Workday Adaptive Planning Service Definition

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Workday Adaptive Planning.

Financial planning.

A highly interactive user interface for self-service reporting that lets you visualize the data and see the impact of your changes instantly. Workday Adaptive Planning provides budgeting, forecasting, reporting, and analytics for organizations of all sizes, with industry-leading usability and the security, scalability, and flexibility required for complex planning. We help people do their best work and help teams operate with agility.

Recognizing that the best plans involve the people closest to the day-to-day business, we built a powerful planning technology platform so you and your colleagues can gain deep insights, make more timely decisions, and manage more efficiently with solid, integrated plans. We enable complex financial models without the burden of managing legacy on-premise systems or massive spreadsheets. And we save finance teams the mind-numbing, error-prone task of manually consolidating data.

Workday Adaptive Planning makes it easy to manage, report, and analyze business performance. And our Elastic Hypercube Technology gives you the flexibility to scale without sacrificing ease of use.

Industry-leading usability.

In business, everybody plans. In large corporations, planning processes span a range of finance and operations teams as well as users from a complex ecosystem of departments, business units (BUs), regions, and countries. Workday Adaptive Planning broadens planning with industry-leading ease of use that accelerates adoption and drives engagement across finance teams, operations, and business units. By engaging finance and non-finance users in a collaborative, active planning process, you can create plans aligned with your organizational goals, ultimately delivering better and more timely decisions.

Key Benefits

- Flexible modeling that lets you adjust dimensions as business conditions change, for what-if scenario modeling on the fly
- Enterprise-wide planning capabilities that enable organizations to orchestrate planning and performance at local and corporate levels
- A single data source across the organization for the insights and confidence needed to make better decisions faster

Built for business.

Many systems take a long time to deploy. Once deployed, changes to structures, reports, and analysis typically require dedicated IT resources to support business users' needs, limiting agility and consuming IT resources. With Workday Adaptive Planning, finance and operations teams control their models, processes, dashboards, and reporting with the drag-and-drop functionality that doesn't require coding or scripting—or much support from IT.

Adapts to change.

Businesses need the flexibility to adapt quickly to change, but traditional planning systems aren't that agile. Workday Adaptive Planning is designed for flexible modeling of functional planning and easy scenario planning so models and plans can continuously evolve as markets and the business change. Now companies can bring together workforce planning, operations planning, project-based planning, and financial planning all within a single active environment.

Faster time to value.

Using the intuitive drag-and-drop modeling and reporting interface in Workday Adaptive Planning, organizations can implement their new planning environment quickly and achieve value sooner. Most enterprise-scale customers deploy their first phase within six months. These rapid deployment cycles reduce project risk and free teams to develop more sophisticated models. Our approach includes end-user validation along the way so that user acceptance testing (UAT) is a non-event.

Trusted, scalable technology platform.

Workday Adaptive Planning is an in-memory computing technology platform designed for multidimensional modeling, reporting, and analysis. Supercharged with the patent-pending Elastic Hypercube Technology, it enables granular and complex planning and reporting by any number of critical business dimensions (customer, channel, product, regions, and more), and by day, week, or other time period. The technology platform also enables unlimited what-if analyses to assess the opportunities and impact of potential changes to the business.

Elastic Hypercube Technology enables companies to manage large, data-intensive models without compromise using:

- Extremely large-scale models with quintillions (10^{18}) of cells
- Unlimited dimensions and unlimited dimension values
- Unlimited planning scenarios
- Rapid analysis, comparison, and reporting without cumbersome setup or additional cubes



Dashboard example with expense plan data.

Federated planning domains.

From corporate finance to operating departments and business units, Workday Adaptive Planning enables groups to plan their own domains. Individual plans come together into a holistic, fully linked corporate plan. What's more, each planning domain can have its own comprehensive model based on the planning cadence of its part of the business. This architecture of federated planning domains mirrors the organizational structure of complex enterprises, aligning with how organizations manage data access and control. Federated planning domains enable corporate finance to orchestrate planning and performance at the local and corporate level. This empowers departments and business units to model, plan, and report at levels specific to their needs.

Open technology platform for all your data.

As you plan across your organization, you need data from all your transactional and operational systems. Workday Adaptive Planning is system-agnostic, seamlessly integrating with ERP, CRM, HCM, and BI systems so planners not only see key business metrics to understand how they got here and why, but also use this past performance to drive plans and forecasts for where they're going.

To learn more about Financial Planning, visit: https://www.workday.com/en-us/products/adaptive-planning/financial-planning/overview.html.

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Workforce planning.

Workforce planning has become an essential capability for organizational adaptability, empowering HR leaders to plan for their organization's workforce while staying in sync with financial plans to achieve wider business goals. Yet for most companies, having the right tools for successful workforce planning is still a work in progress. Many organizations currently use outdated, complex, and clunky legacy software, or have settled for error-prone spreadsheet processes that can't keep pace with rapidly changing business. But now there's a better way.

Workday Adaptive Planning offers a promising path forward. You get the flexibility and power to take your workforce planning to the next level, enabling HR to collaborate effectively with finance and key business partners while allowing functional and business unit leaders to plan the way they need to.

Powerful modeling and scenario planning across business units.

With Workday Adaptive Planning, you can create scenarios and standardize workforce plans across complex and diverse business units. Manage a single strategic workforce model that distributes across your entire enterprise while also building specific business and revenue models for individual business units.

With driver-based, what-if scenarios on how to evolve your workforce, you can better align your people with your corporate plan through top-down or bottom-up workforce planning processes, or both. And you get clear visibility into your workforce composition and cost with automated allocation rules. Drill deep into data across dimensions such as job level, department, job family, skills, projects, and locations. Break down FTE counts compared to contract workers and with a single click, factor in key global and local business drivers and assumptions that can impact your workforce needs.



Get a complete view of your workforce.

Key Benefits

- Improved data accuracy, consistency, and completeness, resulting in cost and time savings.
- Enhanced collaboration and data insights between HR and finance teams.
- Single source of truth for HR data.
- Holistic view of workforce planning and workforce driver-based scenario planning including hiring, transfers, retention, salary, and more.
- Quick and agile decision-making among senior leadership teams.
- Ability to identify workforce skills gaps and then model, plan, and execute the fastest way to address those gaps in real time.

"Workday Adaptive Planning will help accelerate our journey from traditional headcount planning to a strategic workforce planning process, enabling us to efficiently manage headcount and align human capital with business needs.

Kenneth Ruch
AVP of HR Committee Governance, People Analytics, and Organization Design, Nationwide Insurance

Make workforce planning a team effort.

Workforce planning should be agile enough to become a team effort among HR and finance, and their business partners. Workday Adaptive Planning provides the framework, shared data, and workflow to enable greater collaboration on dynamic, flexible workforce plans.

For many companies, it's difficult for their HR team to access forward-looking hiring plans because it is often only in the loop when job reqs get opened. Workday Adaptive Planning for the workforce fills this gap with full visibility into hiring plans—both short- and long-term—so all stakeholders can collaborate in real time.

Bridging to finance, you can now easily link workforce plans to financial models with up-to-date headcount plans and related costs. This dramatically reduces the risk of errors and frees up time previously spent on low-value-add data consolidation tasks to focus on workforce strategy. Easily share plans as they develop via dashboards and self-service reports to get feedback and buy-in. And because Workday Adaptive Planning lets users choose between a web interface familiar to spreadsheet users and a Workday Adaptive Planning-connected Excel worksheet, it's much easier to get ongoing adoption from those still clinging to spreadsheets.

Workflow management that keeps everything on track.

Traditionally, planning has been done via email, offering workers little visibility into the overall plan and no easy path to completion. Now you can keep workforce plans and budgets in sync with financial plans in real time. Built-in workflow allows managers to enter, review, and approve plans and budgets. Meanwhile, planning administrators can track tasks, user discussions, and cell notes to monitor changes and issues with a powerful audit trail.

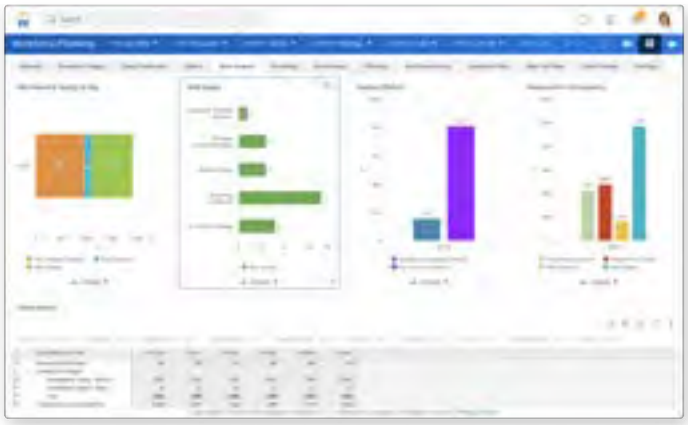
The business agility you need.

Today's evolving business environment requires agility—and Workday Adaptive Planning enables HR business partners and leaders to become more agile during their planning cycles. Quickly course-correct, and use dashboards and dynamic reporting to monitor and analyze costs, view open positions, and break down the geographical mix of your workforce:

- Track plans against actuals so you don't over-hire or end up short-staffed.
- Analyze gaps in achieving your plan; add planned hires, push out hiring dates, change ramp-up time assumptions, plan for attrition, and see capacity impacts in real time.
- Quickly model and analyze the impact of important events, such as M&A, divestitures, or internal restructuring.
- Model skills by location, ramp-up time, cost of workforce, and more to meet current and long-term business goals.

Key Capabilities

- Plan your workforce with flexible, multidimensional models that map to how you run your business—by level, department, job family, skills, projects, location, FTE vs. contingent workers, and more.
- Model hiring, transfers, and retention plans, and instantly see the cost impact to data updates or driver changes—by supervisory organization or cost center.
- Compare multiple driver-based, what-if scenarios in real time to see the impact upstream and downstream to create the optimal plan.
- Perform what-if labor analysis that includes areas such as salary and salary increases, bonuses, and equity compensation pool scenarios across business units.
- Drill down from plan data directly to your Workday human capital management and financial transaction data, and metadata.
- Plan and model the impact of one-time events, such as restructures or M&A.
- Model critical skills capacity, demand, and gaps by location, cost, and ramp-up time.



Match skills supply with demand.

Tightly link planning to execution and analysis.

Bringing your planning, execution, and analysis needs into a single platform drives our vision for planning. To be effective, your workforce plans need trusted ERP and human capital management data for visibility into key people metrics and movements to act as drivers for financial plans and reports. From one platform, analyze critical skills needs, identify gaps and how best to fill them, and then put your plans into motion by leveraging business process frameworks in Workday. Build in succession plans, ramp-up time for new hires, and cost of learning programs for current employees to inform your grow, flex, and hire people decisions.

Workday Adaptive Planning also offers a user-friendly integration platform that reduces the need for IT support. In addition to being tightly linked to your financial and HR data in Workday, you can automatically tap into data from third-party sources, such as salary and benefits benchmarking data, to more accurately drive your workforce planning decisions.

Safeguard your data with enterprise-class protection.

We know how critical it is to protect your data, particularly workforce data. Workday Adaptive Planning provides enterprise-class protection, service, and resilience you can rely on and trust, with SOC 2 Type 2 compliance—the AICPA standard for reporting on controls at service organizations, including SaaS providers. The SOC 2 attestation covers security, confidentiality, processing integrity, and availability trust principles.

To explore how Workday can enhance your workforce planning needs, visit: workday.com/workforce-planning

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