

Crafting Value: How Data/ Digital is Reshaping FP&A

FPAC™

CERTIFIED CORPORATE
**FINANCIAL PLANNING &
ANALYSIS** PROFESSIONAL

STAND OUT FROM THE CROWD

with the Certified Corporate Financial
Planning and Analysis Professional Credential

“Earning my **FPAC** played a
critical role in this promotion.”

Natalie Morrison, CTP, FPAC

Manager of Financial Planning &
Analysis, *WaterOne*



LEARN MORE AT WWW.FPACERT.ORG

Crafting Value: How Data/ Digital is Reshaping FP&A

Andrew Codd



Founder & President
AV Worldwide

Betsy MacLean



Board Member, Chair, Audit Committee
mCloud Technologies Corp.
Phoenix



A Virtual Event for Finance Professionals

Crafting Value: How Data & Digital are Reshaping FP&A

ANDREW Codd

Premier Sponsor 

Micro-FP&A \$5B BU

- ✓ One source of truth
- ✓ More self-service analytics
- ✗ -100 eNPS
- ✗ CFO deemed Team as expensive
- ✗ 50% Voluntary Staff Turnover
- ✗ Unhappy Business Partners
- ✗ BU partner results slipping

#5177

STRENGTH
IN THE NUMBERS



65%

of

BUSINESS
PARTNERS RATING
FINANCE

AS **INEFFECTIVE**

GARTNER 2021

29%

of

FINANCE
TEAM MEMBERS
ENGAGED

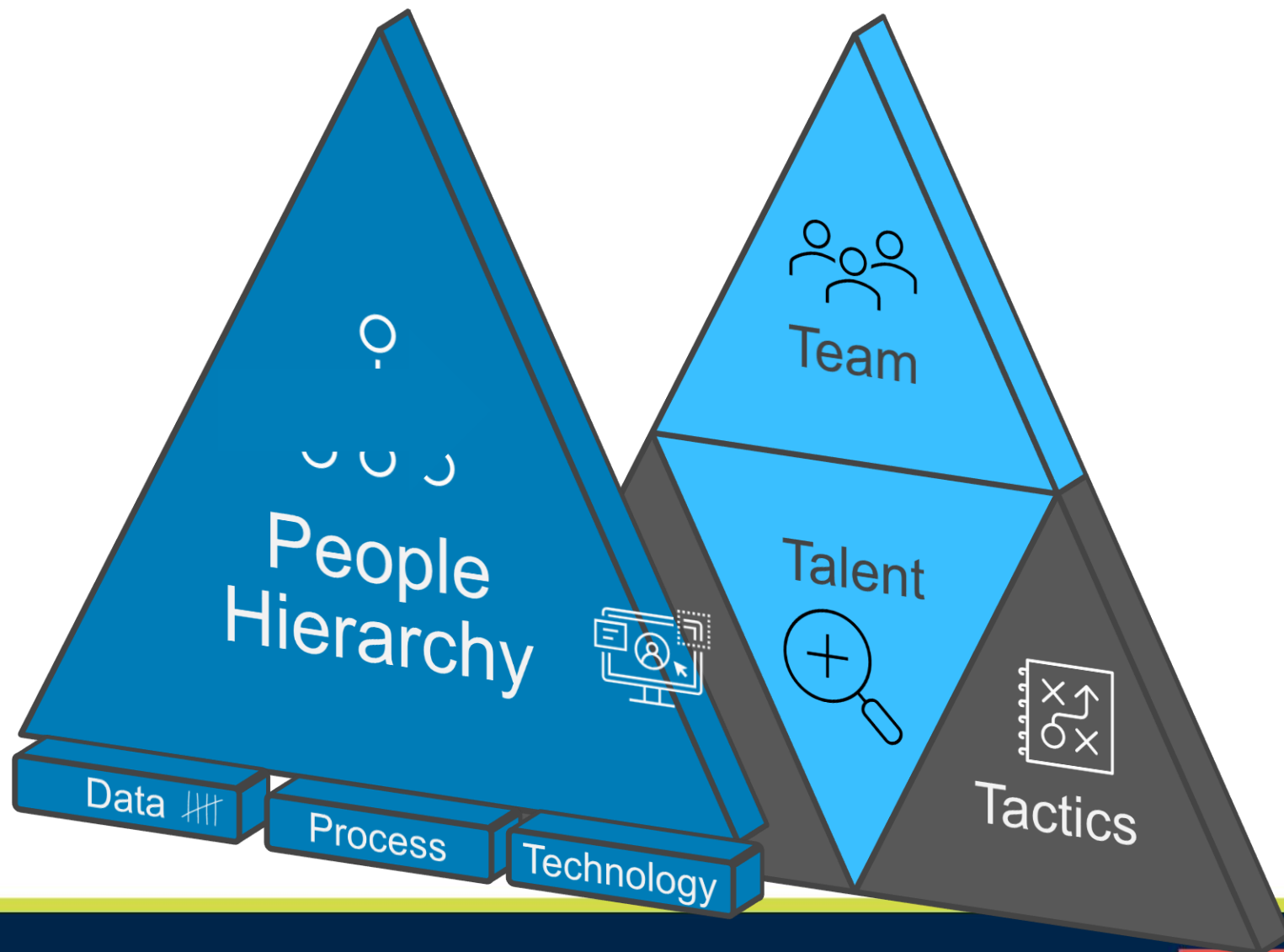
IN THEIR WORK

BLIND 2021

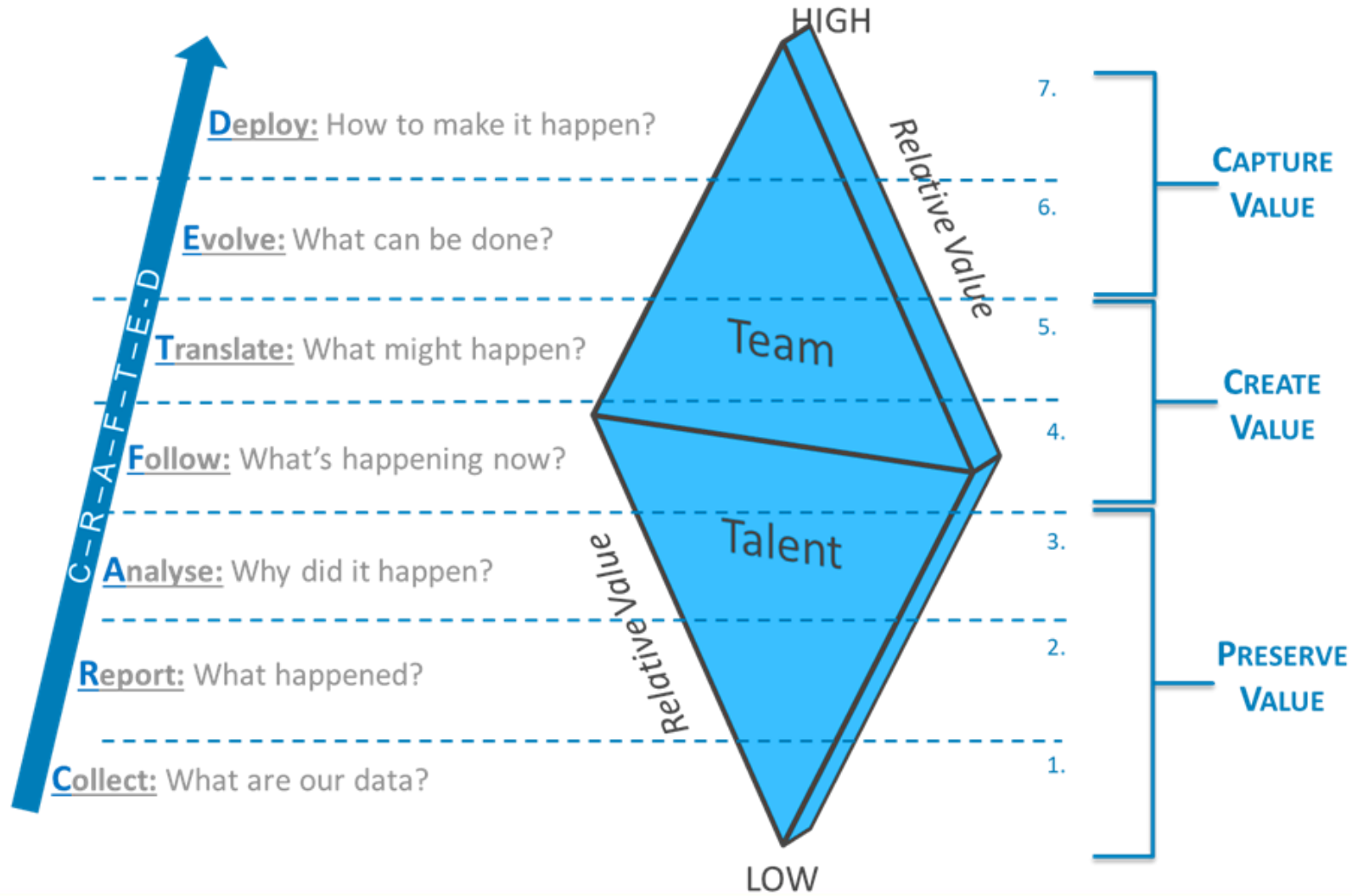
Back To Trouble

DIGITALIZE OR DIE

3 Steps to **Crafting** Value



IN THE DIGITAL AGE FP&A VALUE IS C-R-A-F-T-E-D FROM THE BOTTOM UP



2



TEAM &
TALENT



BUSINESS
STAKEHOLDERS

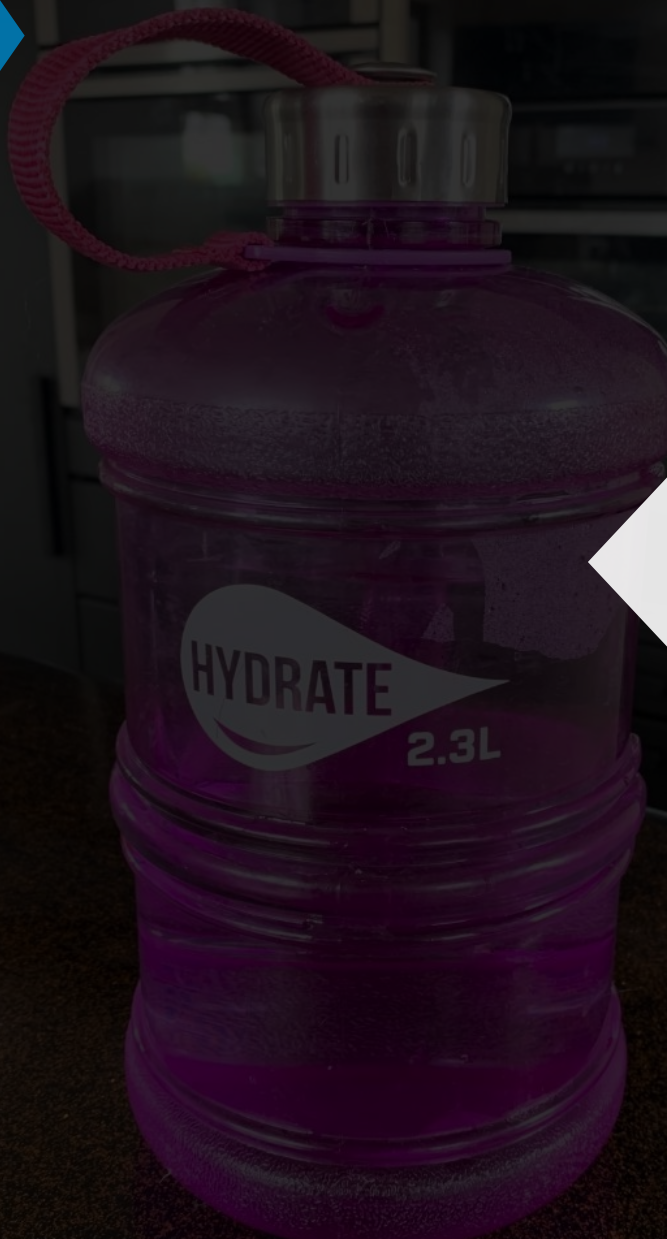
Stakeholder Alignment Template

	KSF1		KSF2		KSF3	
Stakeholder	Have	Want	Have	Want	Have	Want

Stakeholder Alignment Example

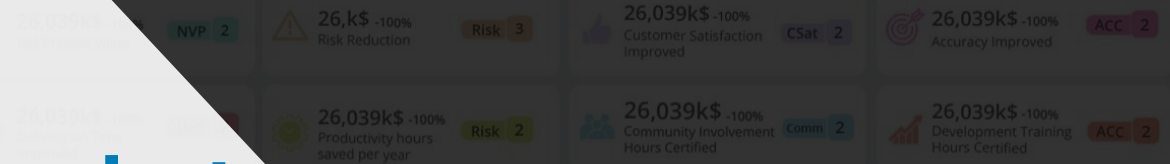
	KSF1		KSF2		KSF3	
Stakeholder	Have	Want	Have	Want	Have	Want
FP&A Director	Forecast inaccuracy up to 8% points in some quarters	Loves predictive forecasting, how can we get more accurate quarterly submissions	Basic Long Range Models with no scenario analysis for various what-ifs	Data-driven quick to update scenario plans for next 12 quarters		
Finance VP	Lacking confidence in assumptions used in revenue adjustment journals	Provide pre- & post-paid discounts to help with revenue journals	Difficult to explain post-paid performance to CFO	Post paid story should be easier to consume [One-pager for each Geo]	Not sure data is all joined up across front and back office teams	More joined up partnerships with other information providers [interlocks]
Sales President	Deck with multiple pages not sure all is relevant to running the business	Consolidated view of the numbers, Ideally something able to carry around in pocket				

3



Measure what matters

Dashboard Analysis For Latest 365 Days



Outcomes & Benefits Analysis (OBA) Ranking

Category	Value	Percentage
Ramez, Gina	33.7%	100.0%
Holland, Tadhg	3,940.6%	92.0%
Authers, Michale	20%	85.0%
Ramez, Gina	1.1%	77.0%
Holland, Tadhg	3,940.6%	92.0%



Outcomes & Benefits Analysis

Start Date	Create Date	level	Type	Description	OBA Score	Credit	Testimonials Received
Wed, Apr 21, 2021	Wed, Apr 21, 2021	Deploy	Direct	The mobile app for Koel, which provides a complete mobile app experience and doesn't have the limitations of the mobile web version.	25 finnetics	100%	0
Wed, Apr 21, 2021	Wed, Apr 21, 2021	Deploy	Direct	The mobile app for Koel, which provides a complete mobile app experience and doesn't have the limitations of the mobile web version.	25 finnetics	100%	0
Wed, Apr 21, 2021	Wed, Apr 21, 2021	Deploy	Direct	The mobile app for Koel, which provides a complete mobile app experience and doesn't have the limitations of the mobile web version.	25 finnetics	100%	0
Wed, Apr 21, 2021	Wed, Apr 21, 2021	Deploy	Direct	The mobile app for Koel, which provides a complete mobile app experience and doesn't have the limitations of the mobile web version.	25 finnetics	100%	0

Before

- ✓ One source of truth
- ✓ More self-service analytics
- ✗ -100 eNPS
- ✗ CFO deemed Team as expensive
- ✗ 50% Voluntary Staff Turnover
- ✗ Unhappy Business Partners
- ✗ BU partner results slipping

After

- ✓ \$3B+ value logs; 4M OBA points
- ✓ BUSales up +36%
- ✓ +56 eNPS
- ✓ 70% best cost / opex cut in half
- ✓ Two-thirds of team promoted
- ✓ 30% of team funded by business
- ✓ Hybrid model & Feedback loops



IN SUMMARY: 3 STEPS

1. Shine Bright Like a Diamond
2. Carrots help see in the Dark
3. Measure What Matters

Feedback to Avoid Roadblocks

READ



CONNECT



SUBSCRIBE



Available Now on Amazon
Category Bestsellers in
IRL/UK, FR, DE & USA

Connect on LinkedIn
<https://www.linkedin.com/in/andrewcodd/>
Email: andrew@avfww.com

**Listeners in
171 countries**