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Rising Together: A Cross-Company Planning Framework for Growth in Uncertainty

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Kinnari Desai

Vice President, Corporate Finance, Workday

- **Joined Workday in 2018**
- **Lead Workday's corporate finance team**
- **Previously in finance leadership roles at Veeva Systems and Xilinx**

Sarah Griswold **Vice President, FP&A, Kindred at Home**

- **Joined Kindred at Home in 2018**
- **Experience supporting manufacturing, procurement, sales, marketing and FP&A**
- **Previously worked for Kimberly-Clark Corporation in various financial positions including divisional CFO**

Kindred at Home: Why Cross-Company Planning?

- Lack of visibility across teams
- Disconnected data
- Need for central finance team to have better insight into various levels of the budget

Ajay Sabhlok **CIO & Chief Data Officer, Rubrik**

- **Joined Rubrik in 2018**
- **Promotes business partnership and innovation**
- **Previously worked in IT leadership roles at VMware, Logitech, Mercury Interactive, Siebel Systems, and Oracle**

Rubrik: Why Cross-Company Planning?

- Timely and inefficient quarterly reporting
- Needed better insight into planning across 6 continents and multiple teams
- Needed to align with the office of the CFO to meet 3-day close target

Challenges Discussion

What were the biggest challenges in your adoption of this new process?

Best Practices

- Having a single source of data, accessible by all
- Moving from static, annual planning to real-time, continuous planning with the help of automation
- Standardizing terms across the business functions

Single Source of Data

- Streamlines processes and provides complete transparency across teams
- Offers teams the opportunity for data analysis for informed decision making
- Ensures all teams are utilizing the same data when building reports in real-time

Continuous Planning

- Encourages global collaboration
- Accelerates finance and sales planning from a spreadsheet-based culture to a scalable, effective, and automated process, freeing up time
- Enables businesses to be agile in times of disruption

Standardizing Terminology

- Defines planning categories/processes across the company
- Provides transparency for all accounts and teams
- Forces teams to rationalize their planning

Key Takeaways

- Extended Planning & Analysis (xP&A) across sales, workforce, demand, and operations gives finance teams a holistic view of the business to make better decisions
- By establishing company-wide planning, finance can become advisors vs data gatherers able to deliver real-time analysis
- Through xP&A, functions and business units can better align with the office of the CFO

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THANK YOU

**Kinnari Desai,
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