

Integrated Planning for FP&A's

The FP&A Role in Connecting
Strategy, Operations, and Finance
for Success



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Introduction

- In today's fast-paced world, businesses face more complexity than ever. Markets shift rapidly, customer demands evolve, and new risks emerge at a moment's notice. For organizations to thrive, they need a way to stay agile while keeping every part of the business on the same page. This is where integrated planning comes in—and why Financial Planning & Analysis (FP&A) teams are uniquely positioned to make it a reality.
- Integrated planning connects strategic vision, operational execution, and financial performance. It's about breaking down silos and ensuring every decision aligns with a shared goal. While FP&A professionals don't directly own areas like manufacturing or supply chain, their ability to collaborate, guide, and align these functions makes them critical to the process.
- With the right tools, processes, and mindset, FP&A can help organizations achieve a planning approach that is both efficient and adaptable. Let's explore how FP&A teams can lead the charge.



01 *What is Integrated Planning?*



Integrated planning is exactly what it sounds like: a system that unites strategic, operational, and financial planning into one cohesive process. It ensures that every department is working toward the same objectives, using the same data, and contributing to the organization's success.

FP&A professionals are at the heart of this system. Their role is to connect the dots—making sure the strategic plans set by leadership translate into financial and operational realities.



Key Contributions of FP&A to Integrated Planning:

- **Building Collaboration:** FP&A fosters open communication across teams to break down silos.
 - **Providing Insights:** They deliver the data and analysis that operational and strategic teams need to make smart decisions.
 - **Ensuring Alignment:** FP&A serves as a checkpoint to ensure all plans are consistent with the company's goals.
 - **Monitoring Resources:** They track budgets and resource use to ensure every dollar supports the bigger picture.
- Example in Action: Procter & Gamble (P&G)**
P&G's FP&A team worked with operations to align production schedules with financial forecasts. By using integrated planning tools, they improved efficiency by **15%** and cut costs—all while meeting customer demand.



02 *Why Technology Matters: EPM and CPM Systems*

Let's be honest—integrated planning would be nearly impossible without the right technology. Enterprise Performance Management (EPM) and Corporate Performance Management (CPM) systems give FP&A professionals the tools to centralize data, automate workflows, and collaborate more effectively.

How Technology Supports FP&A:

- **Streamlining Processes:** Instead of wasting time on manual tasks, FP&A teams can focus on high-impact analysis.
- **Scenario Planning:** Tools like these make it easy to model different scenarios and prepare for what's next.
- **Collaboration Made Simple:** Everyone—from finance to operations—can access the same real-time data.

Case Study: Gartner Insights

According to Gartner, companies using CPM systems saw a **20%** boost in forecasting accuracy. This shows how technology enables FP&A to deliver better insights and decisions.





03 **Strategic Planning:** **FP&A's Role** **as Advisors**

Strategic planning is where it all begins. This is the big-picture vision for where the organization wants to go. For FP&A teams, the goal is to ensure that vision is backed by sound analysis and realistic plans.

What FP&A Brings to Strategic Planning:

- **Clarity:** FP&A translates high-level goals into clear, measurable targets.
- **Preparation:** By running scenario analyses, they help leadership understand risks and opportunities.
- **Accountability:** FP&A monitors progress against strategic goals, making adjustments when needed.

Example in Action: Boston Consulting Group (BCG)

BCG worked with an FP&A team at a global retailer to align strategic and financial plans. The result? A **12%** revenue increase, driven by smarter decision-making and tighter alignment across teams.



04 **Business Operations Planning:** *FP&A's Collaborative Role*



When it comes to business operations—things like supply chain, manufacturing, and demand planning—the execution falls to the experts in those areas. But FP&A plays a critical supporting role by ensuring operational plans align with financial realities and strategic priorities.

How FP&A Adds Value to Operations Planning:

- **Ensuring Alignment:** FP&A ensures that operational plans support the company's financial goals.
- **Providing Insights:** They analyze trends and forecasts to guide supply chain and production decisions.
- **Fostering Collaboration:** By facilitating discussions between operations and leadership, FP&A helps everyone stay on the same page.

Example in Action: KPMG's Collaborative Approach

KPMG helped an FP&A team guide operational leaders in integrating supply chain and demand plans. This partnership led to a **25%** improvement in production efficiency without sacrificing quality.

05 *Financial Planning: Planning: FP&A's Core Strength*



Financial planning is where FP&A teams shine. This is their chance to translate strategy and operations into budgets, forecasts, and resource plans that drive success.

Core Responsibilities for FP&A in Financial Planning:

- **Budgeting and Forecasting:** FP&A ensures budgets reflect both strategic goals and operational needs.
- **Risk Management:** They identify potential financial risks and develop plans to address them.
- **Performance Monitoring:** FP&A tracks financial results and recommends adjustments to stay on track.

Example in Action: ACCA's Telecom Transformation

A global telecom company worked with its FP&A team to adopt integrated financial planning, reducing costs by **10%** without impacting customer service.

06 *Why Technology is a Game-Changer for FP&A*



Technology isn't just helpful—it's essential for FP&A teams managing integrated planning. Tools powered by AI, automation, and data visualization can transform how teams operate.

Top Tools for FP&A:

- **AI and Predictive Analytics:** Enables smarter forecasting and trend analysis.
- **Real-Time Collaboration Platforms:** Keeps everyone on the same page, even across departments.
- **Data Visualization:** Transforms complex numbers into clear, actionable insights.

Example in Action: Workday's Impact

Using Workday's cloud-based platform, one FP&A team reduced their planning cycles by **30%**, freeing up time for strategic work. impacting customer service.





07 *Benefits of Integrated Planning for FP&A*



Integrated planning is more than a framework—it's a way to elevate FP&A's role in the organization.

The Payoff for FP&A Teams:

- **Better Decision-Making:** Data-driven insights mean smarter, faster decisions.
- **Stronger Collaboration:** FP&A becomes a key partner to all departments.
- **More Efficiency:** Automation frees up time for high-value activities.

By the Numbers:

- **60%** of companies using integrated planning report faster, better decisions.
- Companies with integrated planning see a **20%** improvement in resource efficiency.





08 *How FP&A Can Lead the Transition*



Adopting integrated planning isn't just about processes or tools—it's about culture. FP&A must lead the way by fostering alignment and collaboration.

Steps to Success:

- 1. Audit the Current State:** Identify disconnects between strategy, operations, and finance.
- 2. Build Bridges:** Create forums for cross-departmental collaboration.
- 3. Adopt Technology:** Choose tools that streamline workflows and enhance visibility.

Example in Action: PwC's Framework

PwC guided an FP&A team to integrate planning systems, saving **25%** in costs and building a culture of collaboration.



09 *The Future of Integrated Planning for FP&A*

The future is bright for FP&A teams willing to embrace integrated planning. Trends like sustainability, AI, and global alignment will only increase the importance of this role.

Key Takeaways

- **Integrated Planning is Essential:** It aligns strategy, operations, and finance to drive results.
- **FP&A's Role is Central:** While they don't own execution, FP&A guides alignment, collaboration, and decision-making.
- **Technology is a Must:** EPM, CPM, and AI tools enable smarter, faster planning.
- **The Impact is Real:** Companies using integrated planning see measurable improvements in efficiency and performance.



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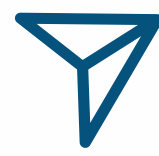
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