QMetrix

Workday Adaptive Planning Health Check

As a market-leading Corporate Performance Management technology, Workday Adaptive Planning has the potential to provide significant strategic benefits for your organisation. However, there may be certain challenges or limitations that have prevented the solution from fully meeting expectations and delivering the desired business value from your Workday Adaptive Planning investment.

Does your Workday Adaptive Planning instance:

- Perform slowly? For example, when loading data from source systems, updating or refreshing data in a model
- Have poor user uptake?
- Have planning models that are no longer fit-for-purpose or don't suit business needs?
- Have limited reporting capability which is confined just to financial information?

Do you and your team lack knowledge of how to use and manage the solution? Do you want to know what can be further achieved with Workday Adaptive Planning?

If you answer yes to any of these, consider a Health Check with QMetrix.

What is a Health Check?

The health check generally focuses on 5 key areas. However, we may limit the scope depending on your preferences and problem areas.

1. Re-evaluating the goals and objectives

QMetrix will consult with you to re-examine the original goals of your Workday Adaptive Planning instance, what the key objectives were and where it is falling short of the key business value drivers you may have submitted as part of the original business case.

2. Best practice methodology and design

QMetrix reviews the overall Workday Adaptive Planning instance and associated models to determine if they have been constructed in alignment with generally accepted best practice methodology and if they conform with well-established design principles.

Having the correct methodology ensures the models are easily supportable, perform in an acceptable manner and are extensible. This ensures the build out of further capability is as cost-effective as possible.

This includes a review of: Core instance / domain configurations, foundation structures (organisational structure, GL accounts, dimensions etc.), naming conventions, rules and formulae, and appropriate use of sheet types.

3. Integration with source systems

QMetrix reviews the integration method used, speed and reliability of refreshes, and extent of manual intervention required to support it.

4. Planning and reporting models

QMetrix reviews the usability and capability of the planning and reporting models, and how well they suit existing business requirements.

We may also identify further planning models that may add value to the budgeting and forecasting process, or additional data sources that can uplift the value of the reporting suite. We will also examine the suitability and use of the 3 available reporting methods within Workday Adaptive Planning.

5. User uptake and security model

QMetrix will seek commentary and feedback from the key user(s) in relation to their views on performance and usability. We will audit current usage and opportunities to grow the usage within current subscription limits.

Training needs and knowledge transfer opportunities will also be identified, as will the suitability of the existing security model.

How does the Health Check process work?

QMetrix will be provided an administrator log in to the Workday Adaptive Planning instance to perform the health check. A mutual Non Disclosure Agreement (NDA) can be arranged before the Health Check is undertaken.

To help QMetrix understand the current configuration and use, areas of concern and potential limitations of the solution, a walk-through of the instance by one of your organisation's team members will be helpful. Having an appropriate non-finance user available for interview as well would be ideal.

This process may require multiple sessions.

What do you get at the end of the Health Check?

A report will outline the findings of the health check and what remediation activities may be required and why. This will include estimated time and cost to remediate, and identification of the risks associated with not addressing the issues.

This may also include a roadmap of potential initiatives that may be undertaken and a guide on time and effort based on priorities.

Why do a Health Check with QMetrix?

QMetrix is a preferred accredited solution implementation partner of Workday Adaptive Planning and one of the few partners in the APJ region to achieve this status.

The Preferred Accreditation level means QMetrix consultants have been trained in the latest software releases and have met stringent certification requirements. It also means that QMetrix has a proven track record of delivering quality implementations with independently validated customer successes.

"QMetrix have worked with so many different clients so they have a lot of knowledge of the solution. They always demonstrate knowledge on the latest product releases and features and know how to use them best. It really does help us adhere to best practice and keep the models clean. This means our Workday Adaptive Planning instance doesn't get complicated and remains easy to use."

– Robert Derman, CFO at Bevilles

Some of QMetrix's clients