

anaplan

Whiteboard Selling

Focus on the CFO

unleash16

63% #1 = Growth

90% Planning → Top Priority

67% CEOs not happy w/growth

Planning and Growth Strategies Are Crucial to Success

<WRITE "63", "90", "67">

- Challenges & Goals of CFO

<WRITE "% #1 = Growth">

- Gartner: 63% of CFOs say growth top priority for investment
- To ensure growth, strong planning strategy must be in place

<WRITE "% Planning", DRAW arrow, WRITE "Top priority">

- CFO Insights: 90% CFOs placed high priority on growth over past 5 years
- Bain & Co. But, 67% of CEOs not happy with organizations ability to implement growth initiatives.

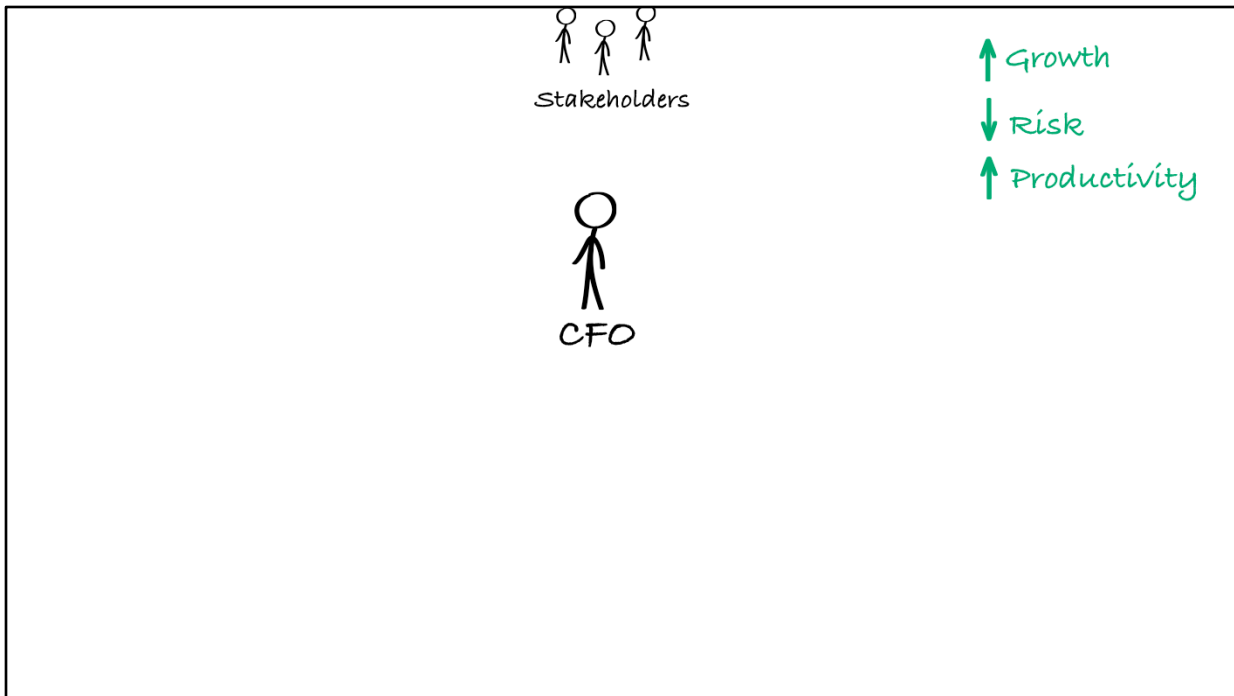
<WRITE "% CEOs not happy w/growth">

- Let's take a look at why that might be.
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¹ 2015 CEO Survey: CFOs Tie Tech to Growth, but Downplay CIOs role, Gartner, 2015

² The Future of Financial Planning & Analysis, CFO Insights, May 2015

³ Strategies for growth, Chris Zook and James Allen, Bain & Company



Evolving role of today's CFO

<DRAW figure, WRITE "CFO">

- As CFO, you are at center of business planning & company performance.
- You are the key executive, along with the CEO, focused on (note: do research on the company and adjust goals based on SEC filings or conversations with staff)
 - Sustainable growth
 - Reducing risk
 - Improving productivity

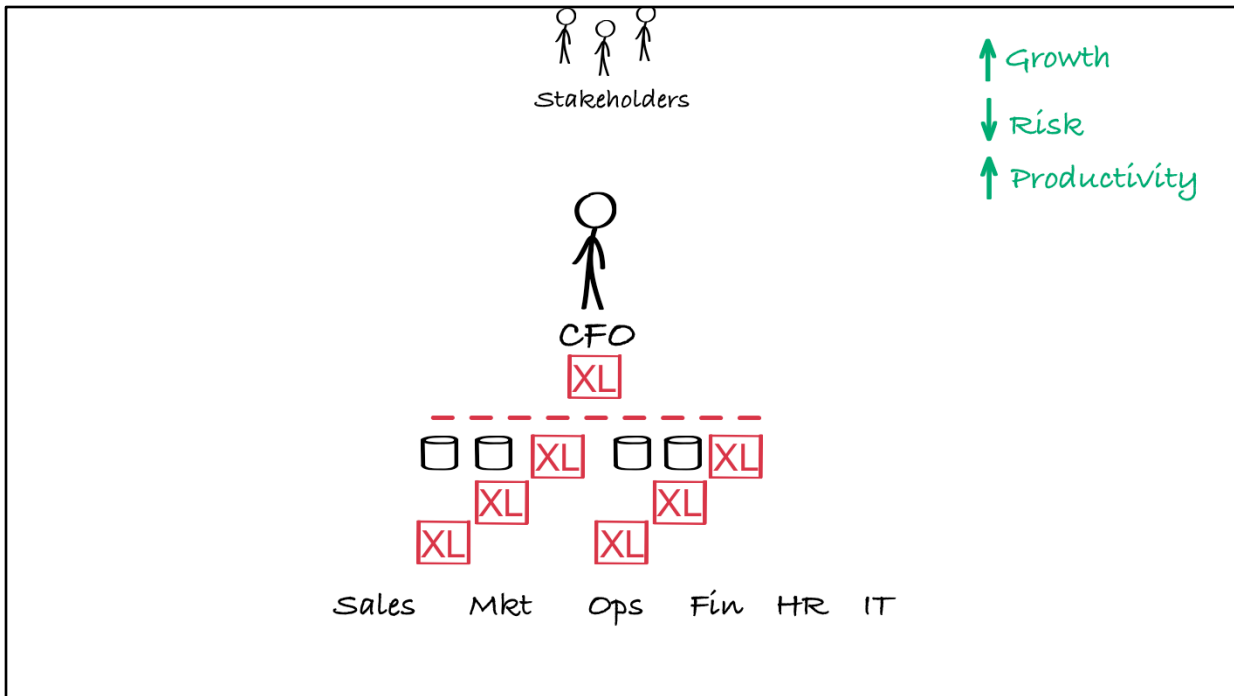
<DRAW up arrow, WRITE "Growth">

<DRAW down arrow, WRITE "Risk">

<DRAW up arrow, WRITE "Productivity">

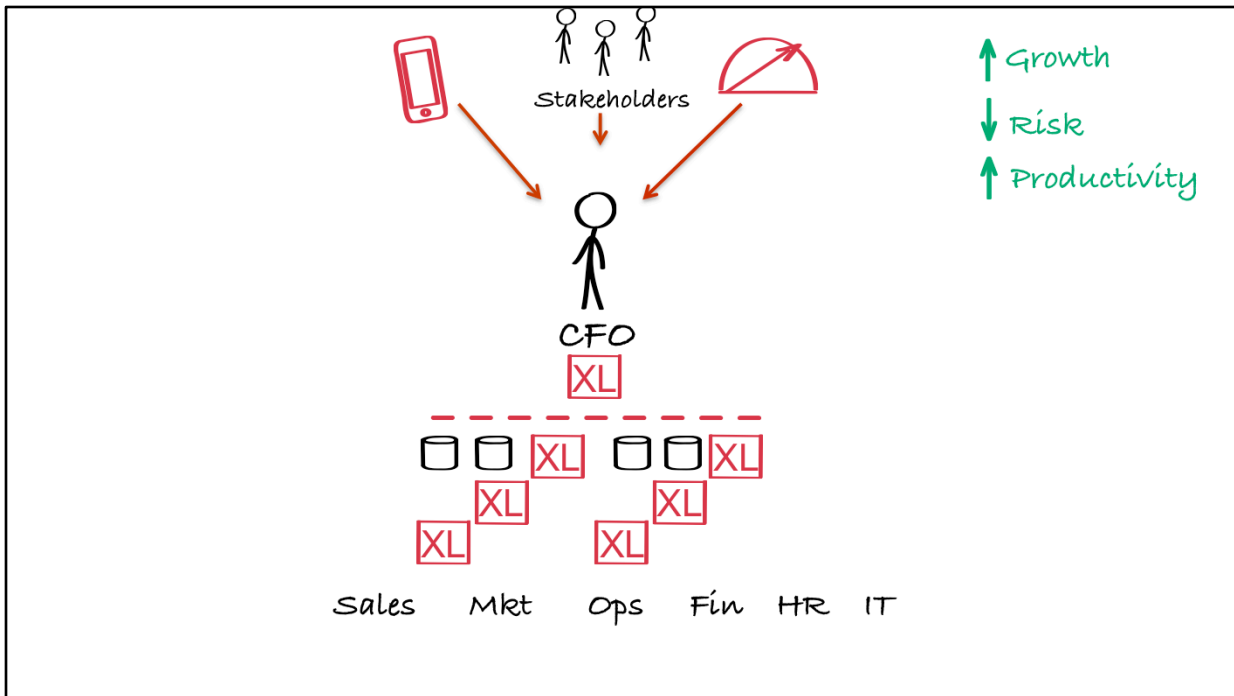
- Your stakeholders: investors, customers, and staff are also invested in these goals
- To meet your goals and the expectations of your shareholders, you need ability to plan effectively and execute on key strategies.

<DRAW people, WRITE "Stakeholders">



Excel Planning = Lack of Visibility and Depth of Detail

- Success means getting accurate info from: Sales, Marketing, Ops, Finance, HR & IT <WRITE “Sales Mkt Ops Fin HR”>
- Many transaction systems in place, and maybe financial planning system. (*note: customize with actual systems of customer – ie: ERP or SAP / CRM or SFDC*)
- <DRAW 4 cylinders>
- Systems process transactions, but they don’t help you make decisions or plan what’s next.
- So, your staff is stuck working with spreadsheets. <DRAW 6 “XL” boxes>
- Excel has become the phantom planning ‘system’.
- Thousands and thousands of spreadsheets that fill information and planning gaps for each department
- Since spreadsheets aren’t connected, collaboration is next to impossible. <DRAW top “XL” box>
- Aggregating all those spreadsheets is slow, painful manual task
- A level of granularity gets lost
- Almost always hidden errors
- Results? Difficult to plan for the future
- Also, you can’t connect your overall plans down to where actual business drivers occur <DRAW dotted line>
- The plans ends up being at too high of a level
- Impossible to see impacts on the operating functions or the business
- You can’t see the best place to make adjustments



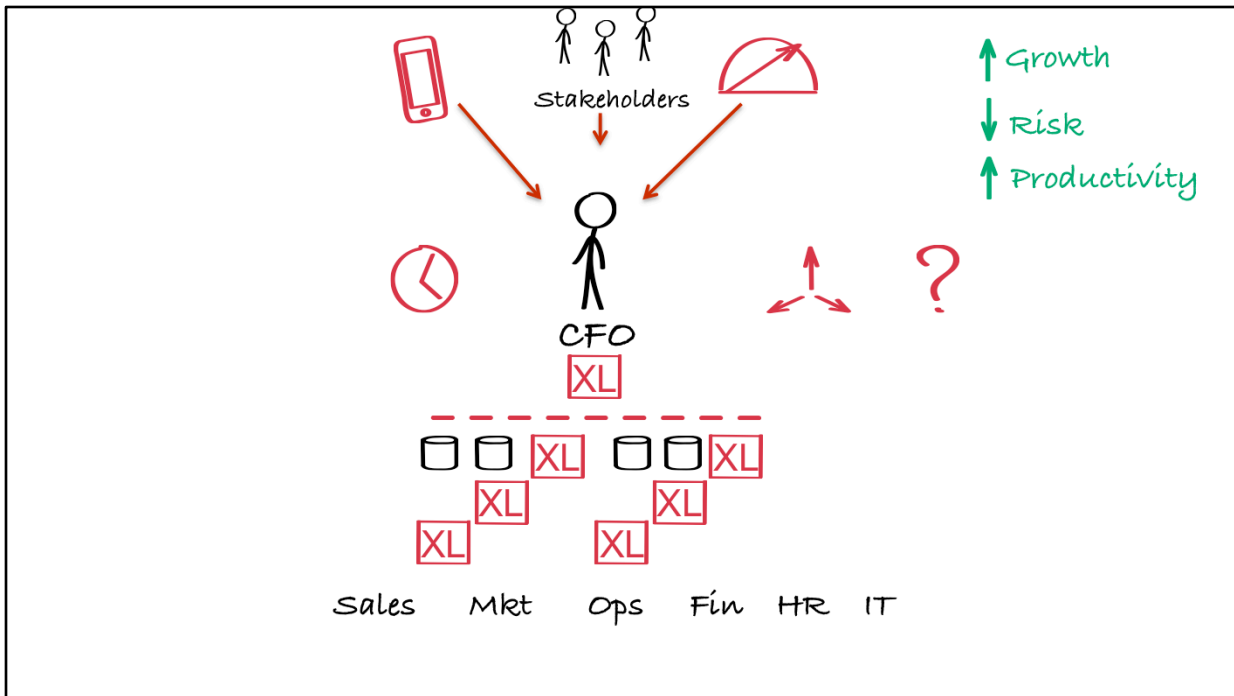
Meanwhile, the world is changing fast

Pressure from every direction

- Technology allows everyone to share info about your company in real-time **<DRAW phone, draw arrow>**
- For this reason, customers & investors are more informed and demanding than ever . **<DRAW arrow from "Stakeholders">**
- The pace of change is faster. Business models are changing and in the globally connected marketplace, there's more volatility **<Draw speedometer and arrow>**

All these external pressures can radically disturb even your best plans and strategies.

You need a way to rapidly respond to changing dynamics and react to potential impacts on the fly.

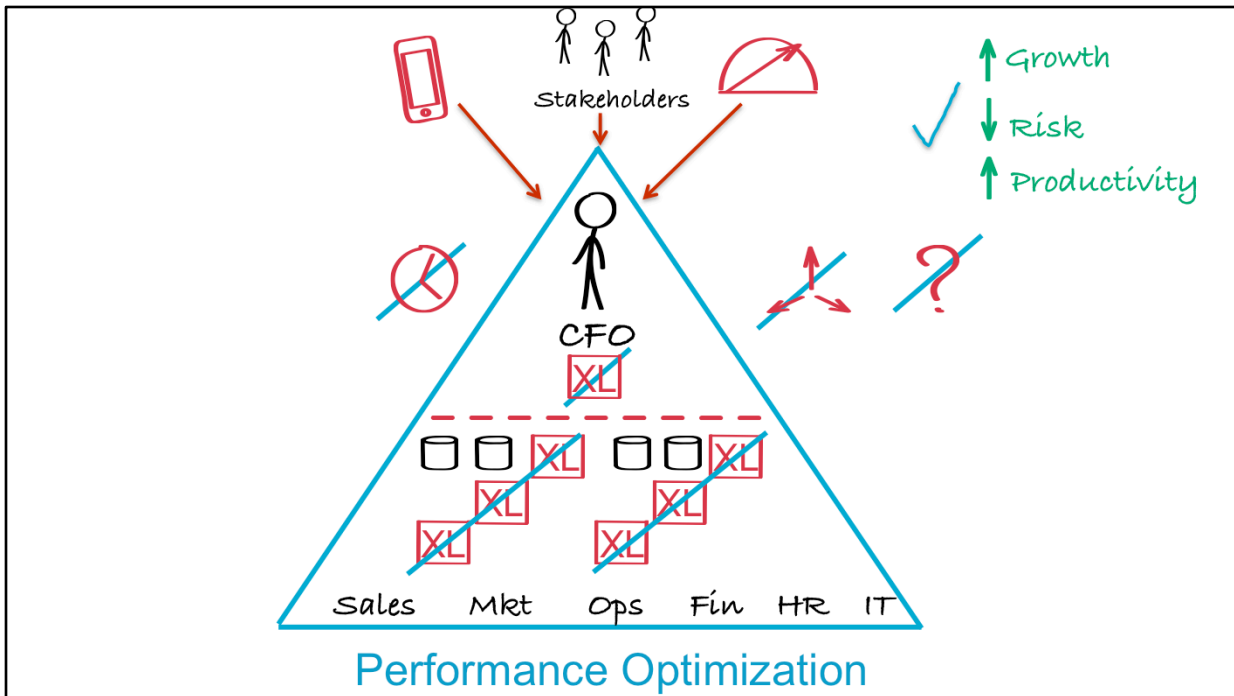


Situational Risk Is Around Every Corner

So, maintaining the status quo is risky.

- You risk not having enough time **<DRAW clock>** to advise the business.
- Your ability to swiftly capitalize on opportunities and pull all levers at your disposal is limited.
- And since you're planning in silos, you risk organizational focus to achieve goals. **<DRAW 3 arrows>**
- **When all departments in the company are not pushing towards the same goals, you get inconsistent performance.**
- The biggest risk is the unknown. **<WRITE "?">** With this disconnected approach, you might get a big surprise you didn't see coming.

But it doesn't have to be this way.



Adopt a Strategy of Performance Optimization

- To meet demands, re-think traditional planning and adopt a *performance optimization* culture. **<WRITE "Performance Optimization">**
- Connect plans down to where the drivers and signals of the organization live, **<DRAW line above "Performance Optimization">**,
- **<DRAW lines to form triangle>** without having to rely on Excel.
- **<DRAW slashes through XL boxes>** Only in this way can you see and pull the right levers to take immediate action at every level of your company.

To foster high performance, your planning approach should be:

- agile
- disciplined
- inspire confidence.
- The core is a granularity of insight to understand the 'what' and 'why' behind the numbers. **<DRAW slash through "?" >**
- You need a way to quickly model change, to course correct on the fly. **<DRAW slash through clock and arrows>**

By connecting plans and engaging with the business owners, you can:

- *continuously* optimize performance
- achieve your goals.

<DRAW check>

And that's what I'd like to talk to you about today.