



What's In, What's Out: Define the Scope of FP&A Support

Results from Gartner's survey
on financial planning and analytics
(FP&A)

Key business decisions FP&A *should* support – but too often *doesn't*

- Business case evaluations
- Capital allocation (day to day spend and ROI)
- Compensation (bonus/incentive)
- Customer analytics
- Distribution channel analytics
- Enterprise reporting
- KPIs definition (financial)
- M&A analysis
- New market entry
- Operational costs
- Portfolio analysis
- Predictive analysis
- Regulatory strategy
- Risk tolerance thresholds
- Sales costs
- Staff planning



Note: Partial list of responses from FP&A directors. Source: 2017 Financial and Business Analytics Benchmarking. n = 78 participating companies, representing varying industries, geographies and sizes.

Why is FP&A not asked to support these requests?

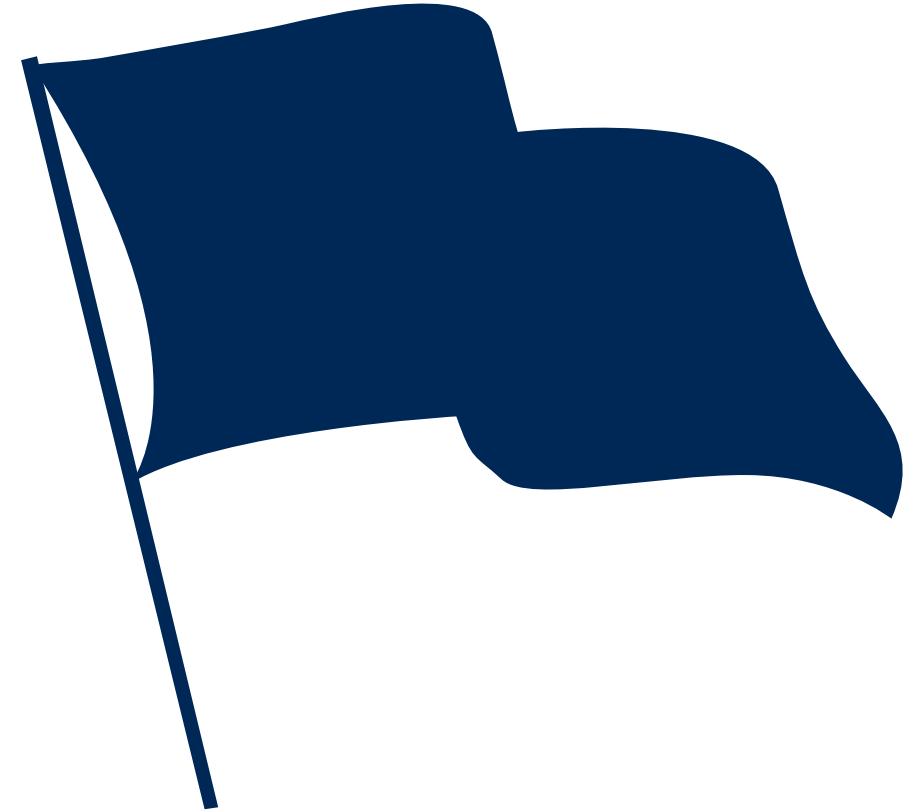
- Business leaders have concerns/trust issues when it comes to sharing confidential information with FP&A
- Business leaders like control/are afraid or not ready to be challenged by FP&A
- Decentralized structures and greater autonomy in the business
- Lack of FP&A resources
- Poor quality of FP&A (outputs and/or staff)/ poor FP&A brand
- Siloed culture from the top of the organization



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Key business decisions FP&A *shouldn't* support – but too often *does*

- Accounting and assistance with the close
- Benefits
- Compensation (base)
- Competitive analysis
- Customer rate and billing issues
- Data pull and analysis from disparate systems
- Headcount analysis
- IT spend (by vendor)
- KPIs definition (non financial)
- M&A valuation
- Macroeconomic forecasts
- Regulatory pricing
- Reporting of historical data and actuals
- Workforce planning (granular)



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Why does FP&A support these “wrong” requests?

- FP&A lacks knowledge about which analytics teams across the organization have the expertise to support various requests
- Business partners send the wrong signals around urgency and/or financial impact of requests
- FP&A fails to effectively screen and prioritize requests
- Business partners don't know how to appropriately translate their needs into analysis requests
- Stakeholders in the business don't understand FP&A's capabilities and strengths
- FP&A doesn't always have the tools or skills to deliver the right caliber of analysis or recommendations for certain types of requests
- Business partners circumvent FP&A managers and ask FP&A analysts directly to help on inappropriate requests



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