



# Shearwater Group

**Beyond the Spreadsheet: Transforming Finance Operations with  
Adaptive Planning**





**Sandy Feng**

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Account Manager

Shearwater Group



**Nidhi Balu**

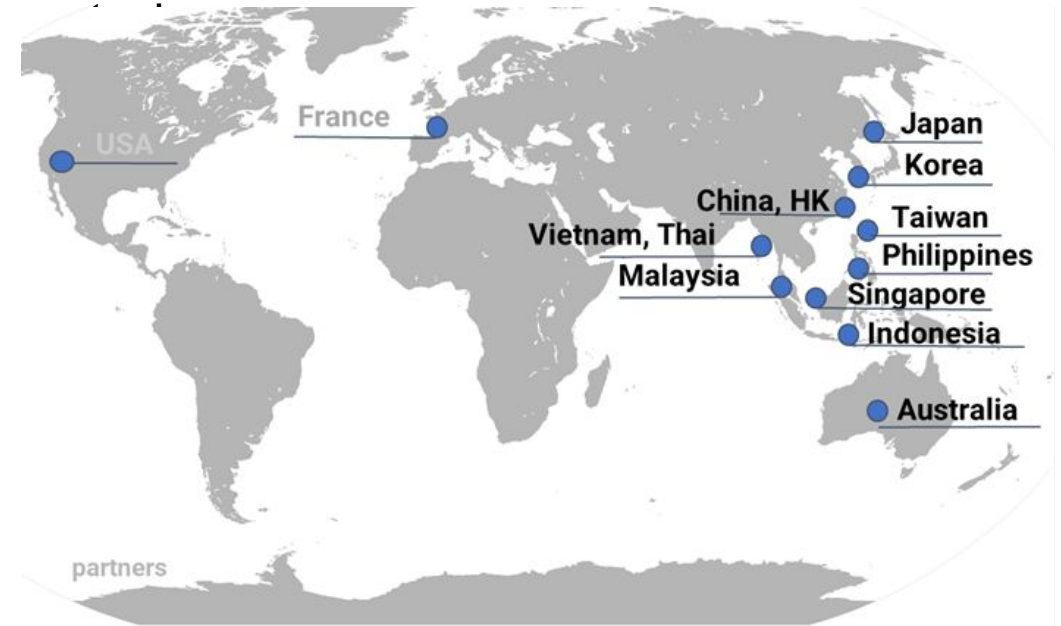
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FP&A Consultant

Shearwater Group

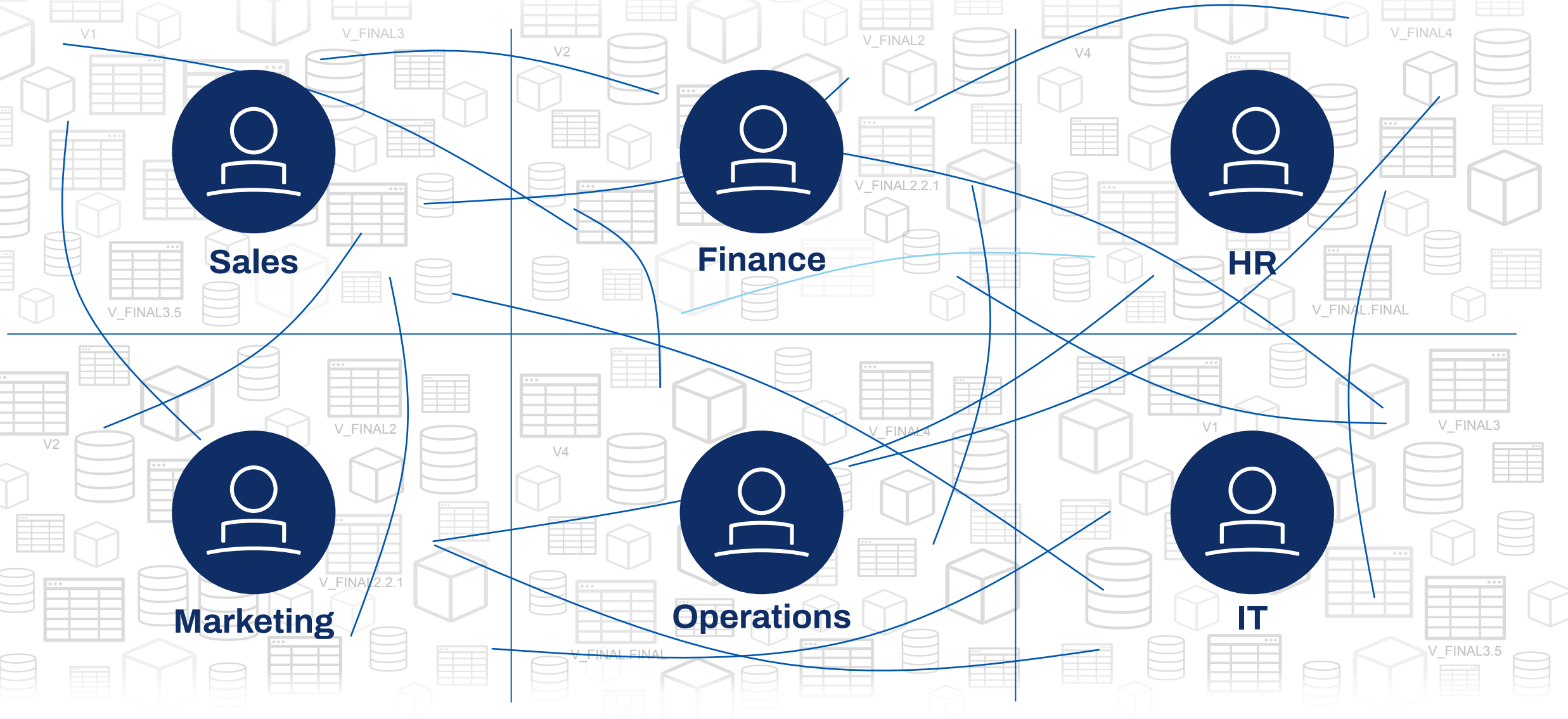
- Established since 2007 in Singapore
- **Largest Partner in Asia**: leading platinum and 5-star cloud consulting partners with Workday Adaptive Planning and Oracle NetSuite.
- 250+ employees globally with local consultants (English + Local Language)
- Solution advisor for FP&A Transformation
- **95%** customer satisfaction, high referral rate
- Long-term partnership model

- Founded in 2005, **Workday, Inc.**, (NYSE: **WDAY**) is an American cloud-based software



- A Leader in the 2024 Gartner® Financial Planning report

# Today's Reality: **NOT** Adaptable Planning



## The Haunted Spreadsheets

Every time you open them up, a new error pulls you in deeper

## The Month-End Balancing

No one leaves until the books are balanced .....

## Disaster: Manual Entry

Just one typo, and the whole quarterly report is thrown into chaos

## No Single Source of Truth

Individual spreadsheets need to be consolidated into a master plan, with no audit trails to track or understand change





# Trend 1: Company Wide Planning

- Stop using siloed datasets stored in siloed systems
- FP&A team to facilitate & empower departments to participate in a single, collaborative planning process
- Finance as a strategic advisor to the team & advocate scenario planning to model different versions of the future



# Trend 2: Cloud Based

- Cloud-based platform to drive single source of truth
- FP&A team to drive process automation and move away from using different data sets (i.e. multiple versions of MS Excel)
- Use updated data to drive continuous interaction, which in turn drives actionable insights and near-real-time course correction.



# Trend 3: Look for Scalable & Adaptive Solution

- Rapid deployment through point-and-click configuration (**no coding**).
- Pre-built applications available so you do not 'reinvent the wheel'.
- Continual software update to avoid disruption from on-premise software upgrade
- Minimize deployment cost: Hardware/Servers (CapEx) & Administrative overheads



*Changes*





**To stay competitive and  
be successful,  
organizations must be  
highly adaptive**

# Workday Adaptive Planning (EPM)

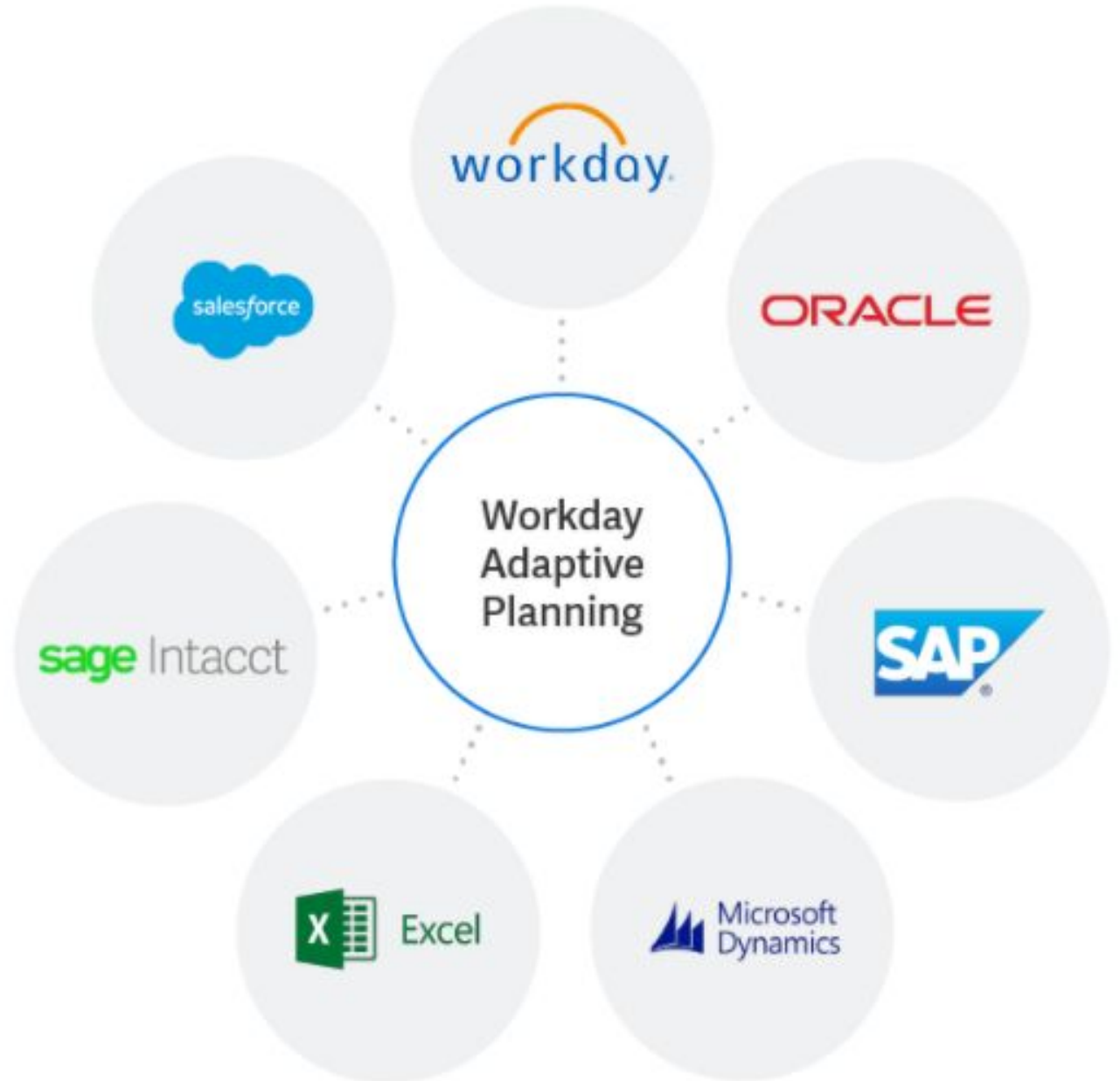
Achieve Continuous,  
Company-Wide Planning

- Easy to use, no coding is required
- Built-In AIML Analytics
- Faster data-driven decisions
- Gets you up and running fast
- Scalability & Performance
- Unlimited Storage+1000 view only user



Integrate with core business systems (Accounting, ERP, CRM, HCM, operational system, Database)

## Cloud and On-Premises Applications



# Introduction



## Nidhi Balu

### Functional Consultant Shearwater Asia

3+ of Industry/Consulting experience in Workday Adaptive Implementations

- **Certifications:** Workday Adaptive Planning Certified
- **Industries:** Retail, FMCG, Logistics, Fintech, Pharmaceuticals
- **Functional Expertise:** FP&A, Revenue Planning, Consolidation



# Agenda

#	Item	Description	Who
1	Demo Background	<ul style="list-style-type: none"><li>• Background &amp; Value</li></ul>	Nidhi
2	Dashboards performance overview	<ul style="list-style-type: none"><li>• Input budgeting assumptions directly in Dashboards and get real time analytics</li><li>• Drill, slice &amp; dice data.</li></ul>	Nidhi
3	Collaborative Planning	<ul style="list-style-type: none"><li>• Processes Manager overview</li><li>• Set and track budgeting tasks for budget contributors</li><li>• In-sheet functionality</li><li>• Data entry</li><li>• Anomaly detection</li><li>• Formula creation</li></ul>	Nidhi
4	What-if Scenarios	<ul style="list-style-type: none"><li>• Assumption driven planning, data drill &amp; Audit Trail</li><li>• What-if reporting based on Assumptions</li></ul>	Nidhi
6	Reporting & Office Connect	<ul style="list-style-type: none"><li>• Drag and drop report creation, conditional formatting &amp; data drill (Act vs Bud variance report)</li><li>• Board Packs &amp; Office Connect (MS suite live outputs)</li></ul>	Nidhi
7	Round-Off / Q&A		General Audience

# Demo Personas



Angela Bianchi

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Budget User



Patrick O'Brien

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Finance Team – Admin

# Implementation Track Record

