

# Accelerating the Budgeting and Forecasting Process

Linda Hull

Paul Barnhurst

July 26, 2023



The Association of  
Accountants and  
Financial Professionals  
in Business



# Featured Presenters



**Linda Hull**  
Product Marketing Director  
Workday



**Paul Barnhurst**  
Founder  
The FP&A Guy

# Workday Helps You Plan for a Changing World

Ease of Use | Built-In Analytics | Flexibility | Time to Value | Scalability & Performance

## Continuous Planning

Update plans with ease, with agile planning and flexible modeling.

## Richer, Timely Insights

Deliver self-service analysis, real-time data updates, and machine learning capabilities.

## Company-Wide Planning

Enhance collaboration with integrated and aligned planning.

## Adapt and Perform at Scale

Scale and grow with modern technology that leverages unlimited dimensionality and a purpose-built integration framework.



# Paul Barnhurst (aka The FP&A guy)



- FP&A influencer (Daily LinkedIn Content)
- 15+ years of work experience, primarily FP&A
- Corporate Finance Training (Excel, Data Viz, FP&A, Storytelling, & More)
- Host of 2 Popular Finance Podcasts
  - FP&A Today
  - Financial Modeler's Corner

# Agenda

Introduction

Why Accelerate Planning?

Opportunities to Accelerate

Company-wide Alignment

The Future of FP&A

Open Q&A



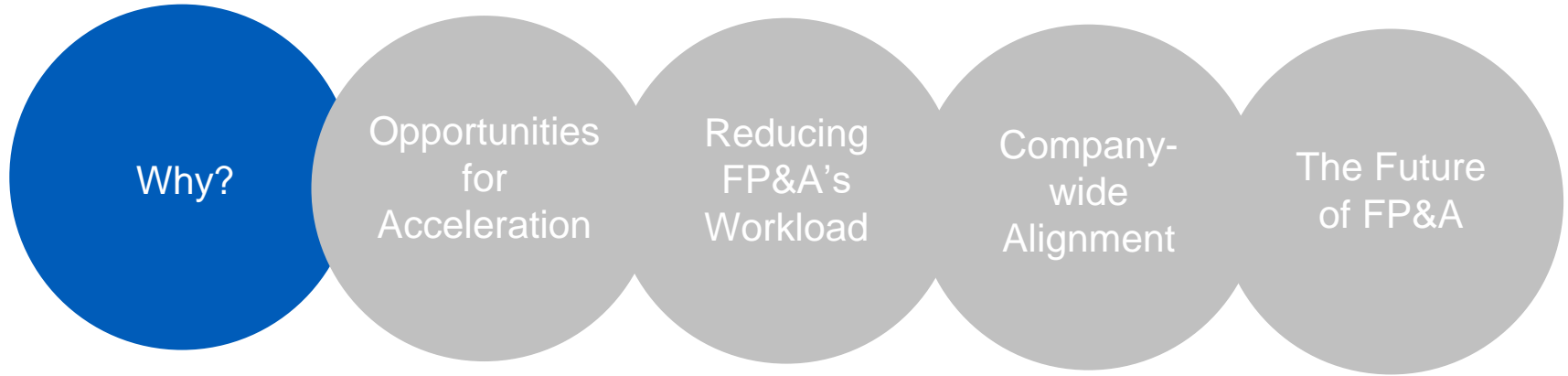
## Poll Question 1:

What makes your Budgeting/Forecasting take so long?

- a. Accessing reliable and 'clean' financial or operational data
- b. Collecting and managing submissions
- c. Version control
- d. Keeping up with the demand for new analysis

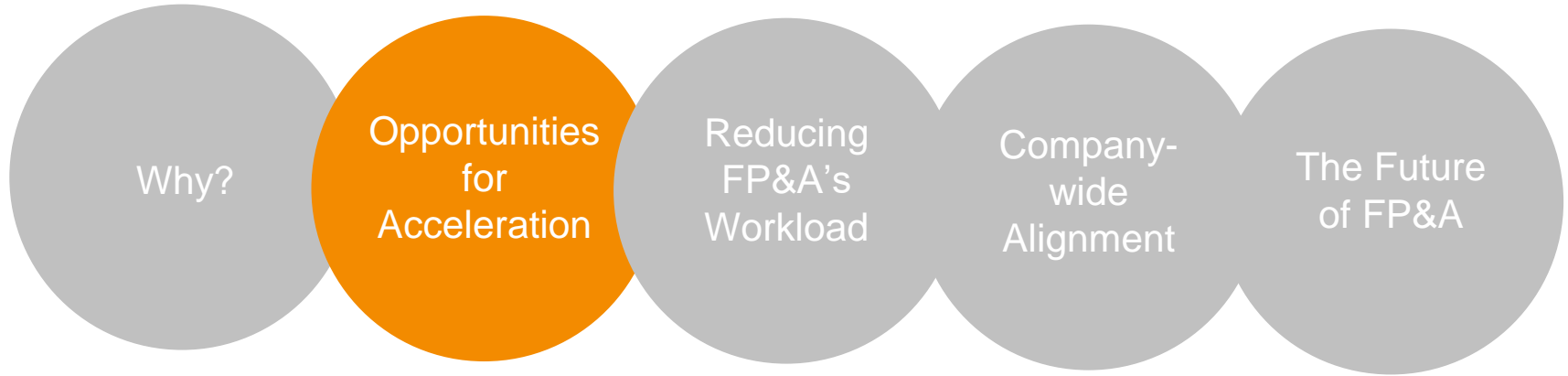
# Poll Question 1 Results: (Placeholder)

# Accelerating the Budget and Forecast Process





# Accelerating the Budget and Forecast Process



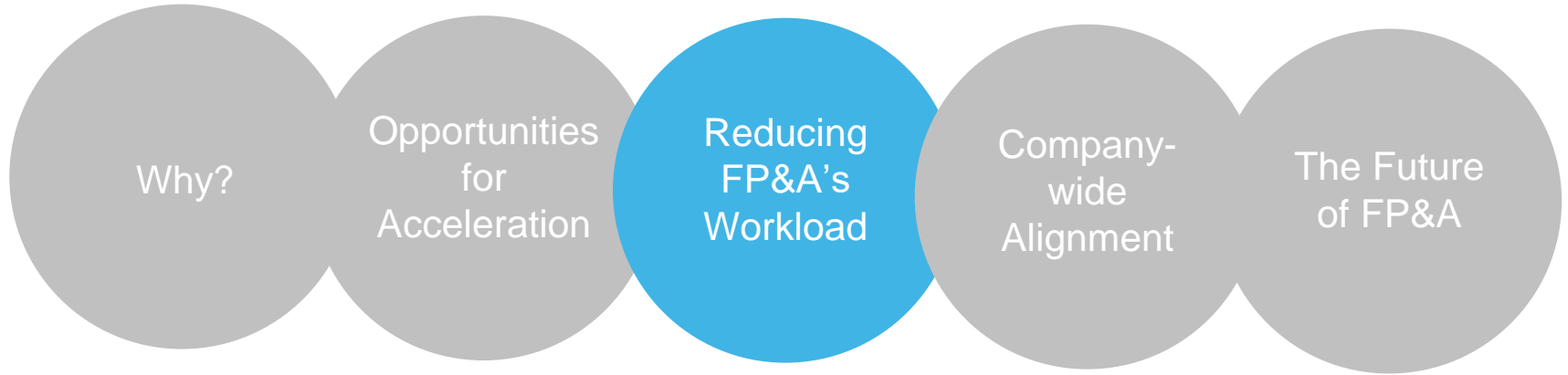
## Poll Question 2:

Where do you see opportunities to accelerate?

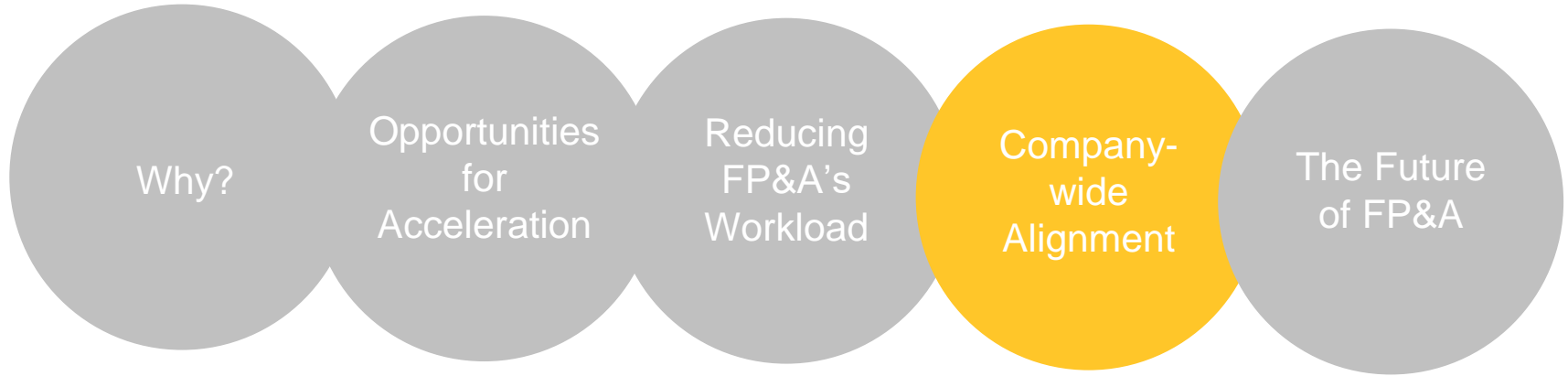
- a. Automating integration
- b. Connect planning across the company
- c. Improve review process
- d. Create better planning models

## Poll Question 2 Results: (Placeholder)

# Accelerating the Budget and Forecast Process



# Accelerating the Budget and Forecast Process



## Poll Question 3:

How often do you forecast?

- a. No forecasting, only budgets
- b. Annual
- c. Semi-annual
- d. Quarterly
- e. Other

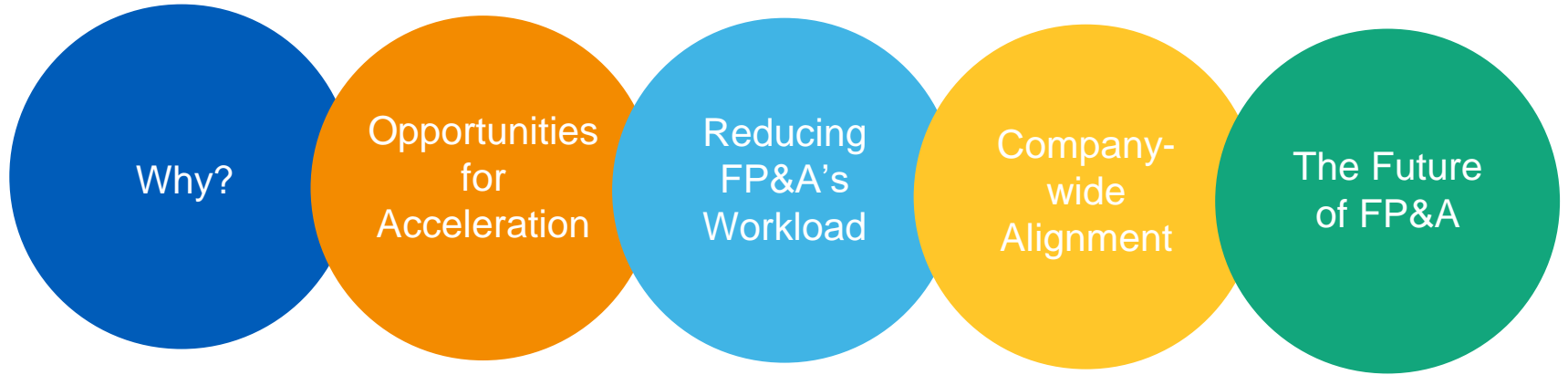
## Poll Question 3 Results: (Placeholder)

# Accelerating the Budget and Forecast Process





# Accelerating the Budget and Forecast Process



## Poll Question 4:

Are you using AI/ML in your forecasting process?

- a. Response Option
- b. Response Option
- c. Yes we are already using it

## Poll Question 4 Results: (Placeholder)

# Questions and Answers



**Linda Hull**  
Product Marketing Director  
Workday



**Paul Barnhurst**  
Founder  
The FP&A Guy

# Thank you!

Workday

[www.workday.com](http://www.workday.com)



The Association of  
Accountants and  
Financial Professionals  
in Business

