



# Case Study

## The FA scores financial planning goals

■ Bedford Consulting

■ Anaplan Partner



## Achieving streamlined financial planning

The Football Association is an organisation as the name suggests, mainly synonymous with football, but goes far beyond just football. Housed inside the revamped Wembley Stadium, the FA hosts everything from the concerts to sporting occasions and other events that require world-class facilities.

Alongside Wembley Stadium, the FA also takes ownership of St Georges Park based in Burton On Trent, home to the National Football Centre, educating the future generations of coaches at all levels of the game, alongside a leading sports medicine and research centre.

The Finance team based in Wembley, were looking for a solution to enable them to model out complex planning for their revenue and cost bases, whilst streamlining reporting.

### Use Cases

Financial Reporting

Revenue Modelling

Cost Modelling

Staff Management

Group Reporting

### Paying the Penalty (of Excel Spreadsheets)

For an organisation as complex and wide ranging as The FA, the ability to produce consolidated reporting across the group and split by division and segmented levels was the goal. Specific drivers of performance that require technical understanding of underlying processes meant an off the shelf solution was never going to be suitable. Naturally, there was a heavy reliance on Excel, and for remote teams using Google Sheets, there was always a disconnect between the format, methodology and ultimately the output of any forecasting or reporting activities.

With a huge organisation-wide systems transformation already underway, it was the natural time for the Finance team to implement a solution that would align to the new world way of thinking, whilst providing an opportunity to build in specific forecasting methodology into the system.

### It's good to have Goals – Evolving and Improving The World

Within a build time of months, compared to years for conventional EPM implementations, the FP&A team at the FA, led by John Williams Group (FP&A Manager), the team was successfully utilising their Anaplan model to collate budget submissions, create consolidated reporting and modelling out the functional areas.

"We have a much more joined up approach – we have confidence in the underlying basics (i.e. everyone is working off the same version, everyone is working under the same assumptions), the biggest change has been at a very basic level giving us the confidence in the underlying assumptions. Now we are in a position to move to the more complex modelling and reporting areas." shared John.

The goal was to remove the reliance on Excel, and bring everyone together into one ecosystem, where planning and reporting went hand in hand. This meant that obtaining a forward looking view of the business with a comprehensive set of numbers cut by various segments would empower senior management to lead with clarity like never before.

The Anaplan platform helped manage investments in the business by giving more granular control and review over the investment budgets. By modelling out scenarios for different options and in real time seeing the impact on the top line results and KPIs, the teams were better able to positively influence financial performance.

## When Data Reliability and Transparency Became the 12th Player

Data issues such as whether we can consistently rely, trust and reconcile data across systems is a common problem within the Enterprise Planning Software space and in complex organisations provides even larger challenges when multiple systems come into play.

The FA with its myriad of teams, department, divisions and sub divisions, all with their unique data requirements meant that the existing ecosystem had a huge array of reliance and interdependencies, such as to Finance, Sales and Operations systems. This meant the task of bringing together and reconciling data points was difficult, a manual process undertaken every month end.

John added "Historically we had relied a huge amount on excel reporting – consolidating multiple tabs/files/versions across the different business units. The reporting was unreliable and not connected. There were also lots of issues with version control, lack of consistency and data management."

The Anaplan platform with its built in API connectors as standard allowed the implementation team to automate the data feed from various systems into Anaplan with relative ease when compared to other systems and solutions.

A key part of that process is the ability to run and automate processes – a chain of actions that can extract, transform, validate and load the data, with built mechanisms in place to flag and reject any non-compliant data.

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The fundamentals are all there now, it means we are all singing off the same hymn sheet – which gives us confidence in the completeness of the data. Working has now become much more collaborative.



## Expanding the Fan Base

With Connected Planning a core concept for Anaplan's global vision, it was natural that upon learning of the development within Finance of an automated planning tool that was cloud based and automated data links with other models in the Anaplan ecosystem that people would want to know more.

John said, "We've already spoken about using Anaplan within our events business – particularly looking at the forecasting of event day workforce (stewarding/ policing/ security/ catering staff). We also think the forecasting of our Team Camp activity will be a future addition to the model."

## At a glance

### Challenge

Moving away from cumbersome Excel spreadsheets, which duplicated workload far beyond reasonable

Creating a system that automated data feeds from Great Plains finance system to streamline reporting, and remove manual data uploads

Create Group reporting that does not need constant reconciliation

Remove discrepancies and error in spreadsheets filled by remote & field teams

### Solution

Cloud based planning tool enables streamlined collaboration between finance and field teams enabling seamless cost and revenue planning and consolidated reporting

Complex revenue and cost modelling driven by inputs and standardised calculations removed

### Results

Group reporting is now more accurate, more efficient given the automated data feeds into finance systems, and easier to analyse – allowing time to be spent driving insight

### Why Anaplan

Multi user cloud based platform - making collaboration easier

Multi-dimensional modelling and reporting capabilities

Ability to integrate automation for seamless month end closing



## About Bedford Consulting

Bedford Consulting is an **Anaplan** reseller and **2020 Anaplan Partner of the year for EMEA**, specialising in project implementation, software sales and connected planning.

We believe passionately that the software we use should empower organisations to plan in a truly connected way, reducing time spent on data collation and preparation and enabling faster, connected decisions across the organisation.

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