

## CASE STUDY: INTERNATIONAL GOVERNMENT CONTRACTOR



### GOVERNMENT CONTRACTOR LEVERAGES RSM FOR WORKDAY ADAPTIVE PLANNING SUCCESS

#### After implementation challenges, RSM steps in to optimize planning and budgeting

Government contracting organizations rely on accurate budgeting, projections and planning to guide projects and maintain effective operations. They constantly seek avenues to gain insight into key activities that can guide more informed and accurate decision making. Organizations commonly lean on technology solutions for this deeper perspective, but in some cases, tools may not be completely aligned with business processes and goals and fail to deliver on expected value.

RSM US LLP recently worked with an international government contractor that implemented Workday Adaptive Planning in an effort to automate planning and budgeting and increase overall organizational efficiency. Unfortunately, the organization began encountering issues within Workday Adaptive Planning, preventing them from taking advantage of the full power of the system and causing end users to revert to manual workarounds and performing functions and creating reports in spreadsheets. These processes were more prone to errors and lacked the desired accuracy and visibility across the business.

#### A problematic start

The challenges originated with the initial implementation firm, which failed to provide effective training or documentation, directly leading to integration issues. In addition, a key goal of the system was the ability to compare Defense Contract Audit Agency (DCAA) provisional rates set by the federal government, target rates that are set internally, and where rates are trending

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RYAN WILSON,  
director at RSM

based on actual data. However, the company had no way to extract data to a single point, and were unable to perform those comparisons.

"They were creating reports and downloading them into Excel," says Ryan Wilson, a director at RSM. "They were doing their own formulas to come up with the rates and then doing their own reporting when the rates should have been calculating automatically."

In addition, the organization faced challenges with several metrics, including estimate at completion (EAC) and estimate to complete (ETC), indirect planning, and rate comparative reporting. With these challenges, the company could not confidently develop accurate project planning and budgeting, which threatened their ongoing success and sustainability.

## Change inspires rapid improvement

The organization determined that a new advisor was necessary and consulted with Workday, which suggested RSM based on the firm's depth of government contracting experience and past project success. The RSM Workday Adaptive Planning team immediately took action, going on-site to document the organization's existing model, identify key pain points and recommend improvements. RSM created a plan to optimize the platform, alleviate current issues, increase automation and ultimately achieve the company's productivity goals.

With a strategy in place, RSM initially provided training and integration support to emphasize change management and adoption of the model. In addition, RSM adjusted the core

model to deliver accurate DCAA rate comparisons, utilizing the organization's actual planning input to determine where the rates are trending in the coming months and years.

Further, RSM quickly alleviated the organization's additional planning and reporting challenges, delivering a new model to allow user entry, as well as forecasting of EAC and ETC for critical projects.

## An effective foundation for future success

With the success of these critical projects, the relationship between the company and RSM has expanded, with plans for additional enhancements moving forward. The planned future initiatives include implementing a new Workday Adaptive Planning solution for the organization's European entities, as well as adding forward pricing projections to their existing model.

Effective reporting and rate comparisons are critical for the ongoing success of government contractors. After RSM delivered enhanced training, documentation, and integration support to automate key functions within Workday Adaptive Planning, the organization now has confidence in the numbers and an ability to accurately forecast and plan their budgets. And, perhaps most importantly, they have a reliable advisor they can implement new solutions and grow with.

"The biggest value is they now have comfort in their own model," says Wilson. "They did not trust that model after the challenges they had with their initial implementation provider. After working with us, and leveraging our industry experience, they now have a trusted advisor they enjoy working with."

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