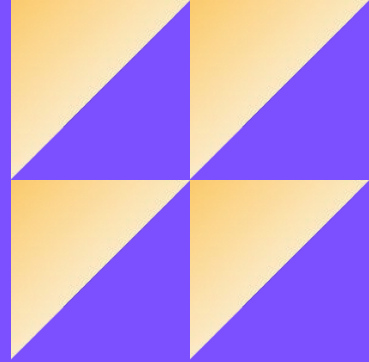




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# How CloudSense Wrote the Book on Workforce Planning 101

Jane Watkins, VP of Finance,  
CloudSense



# Meet your speaker

Jane Watkins, VP of Finance,  
CloudSense

Jane Watkins is VP Finance at CloudSense, a Configure, Price, and Quote (CPQ) platform provider. Prior to joining CloudSense, she led finance teams at various technology, consumer products, and retail firms, including Quip, Tom Davies, StatPro, Bigham's, Pret a Manger, and others.



# About CloudSense

CloudSense is a platform that delivers sales transformation enabling our customers to launch and sell products and services faster.



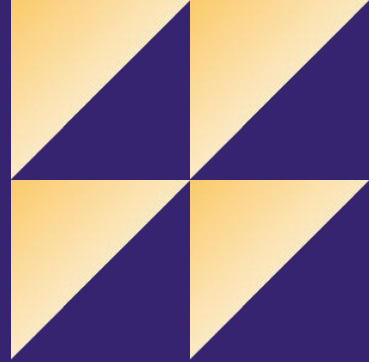
# Agenda

- Business Case
- Implementation
- How we use WFP day to day
- What's next for CloudSense and WFP
- Closing summary

# How CloudSense Wrote the Book on Workforce Planning 101



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# Business Case

Why Planful, why WFP





“Good business  
planning is 9 parts  
execution for every  
1 part strategy”

–Tim Berry

# Business Case: the problem – excel



Current State

- Manual entry – errors / inconsistencies
- Inefficiency – exports from various systems, data manipulation, copy paste
- Disparate models – managed separately no links
- Lack of collaboration – version control
- Security – who has access, overwritten formulas



# Business Case: the problem – forecasting people



Current State

- No link to HR system
- Forecasting starters and leavers
- Modelling assumptions
- Tracking employees vs budget / forecast
- Security





# Business Case: the solution – Planful



Future State



- Multi – source data = integration
- Cloud based = collaboration
- Distribution & interaction = transparency
- Controls and workflows = security

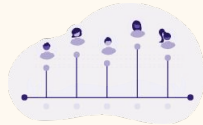
# Business Case: the solution – WFP



Future State



- Data export / import from Bamboo HR = stage 1 (stage 2 integration)



- Complex assumptions = reduces errors and allows scenario planning



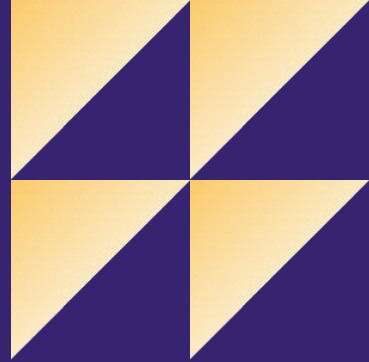
- Distribution & interaction = transparency



- Controls and workflows = security (stage 2 open up to wider business)



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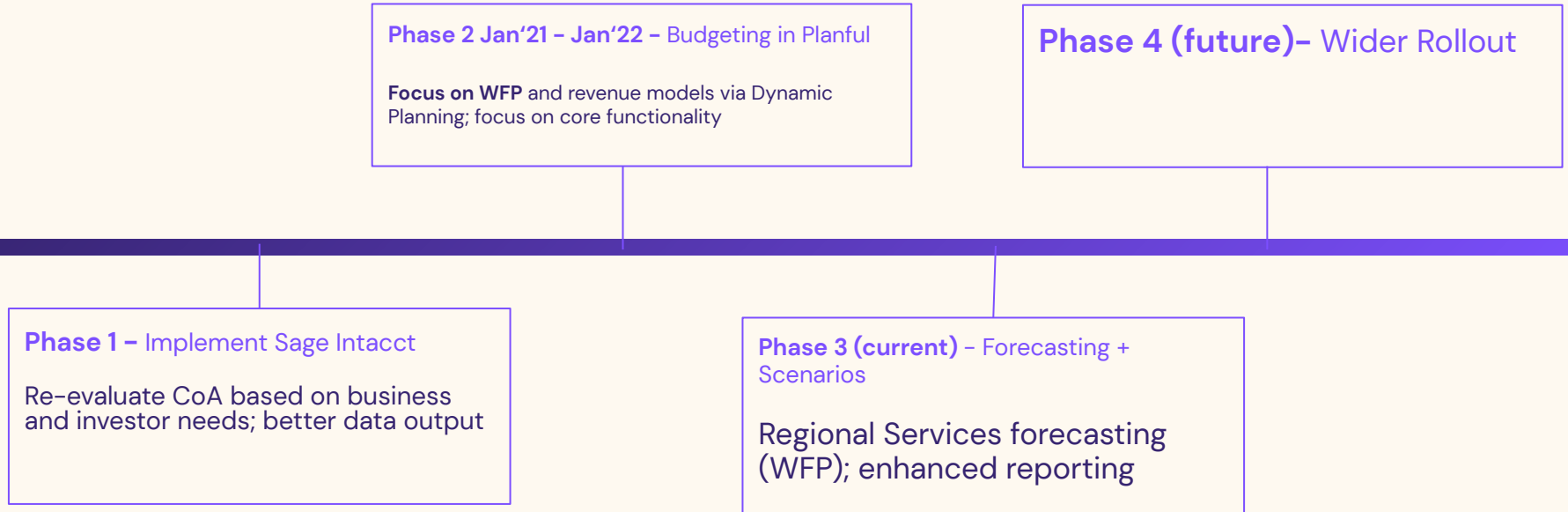
# Implementation

The positives and the learning  
points



# Financial Systems Roadmap

## Phased approach with core finance system implementation



# Implementation: WFP

## Previous Process

1. Download
2. Manipulate
3. Complex formulas
4. Cut and past
5. Updates, validate, re-consolidate
6. Transfer

## Key Issues

- Inefficient process
- Sharing and collaboration
- Data issues and inconsistencies
- Difficult to model scenarios
- Lack of transparency and ownership of data for execs

# Implementation: Key Stages

## Planning and Data Structure

- Engage with stakeholders to understand requirements
- Determine employee types
- Determine compensation items

**Edit Employee Type**

Scenario: FY23 3+9 Forecast

Employee Type Code: Australia

Employee Type Name: \_\_\_\_\_

Update Compensation Items against Employee data

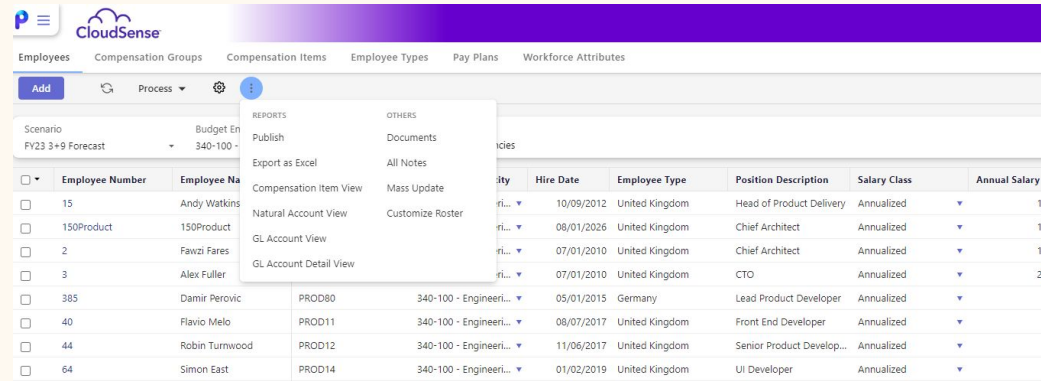
Compensation Items: Salaries, Pension, Medical, Employers Taxes (excl US & Croatia), Bonus 100%, Bonus +2 more..

Compensation Item Code	Compensation Item Name	Basis	Compensation Group
Pension	Pension	Tiers on Employee Attribute - Value in % Wages	Benefits
Medical	Medical	Fixed Amount based on Employee Attribute	Benefits
Employers Taxes (excl US & Croatia)	Employers Taxes (excl US & Croatia)	Tiers on Employee Attribute - Value in % Wages	Payroll Taxes
US Social Security	US Social Security	Tiers on Employee Attribute - Value in % Wages	Payroll Taxes
Croatian Employment Taxes	Croatian Employment Taxes	Tiers on Employee Attribute - Value in % Wages	Payroll Taxes
Salaries	Salaries	Wage Type	Salaries & Wages
Bonus 100%	Bonus 100%	% of Wages	Salaries & Wages
Bonus	Bonus	% of Wages	Salaries & Wages
Contractor Bonus	Contractor Bonus	Direct Data Input	Salaries & Wages
Contractor Salary	Contractor Salary	Wage Type	Salaries & Wages
Students Salary	Students Salary	Wage Type	Salaries & Wages

# Implementation: Key Stages

## Testing and Validating data

- DLR
- Run reports and share data for stakeholder review
- Test how the process works during a budget / forecast cycle



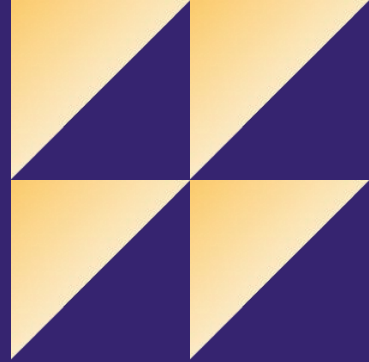
The screenshot displays the CloudSense HR system interface. The top navigation bar includes 'Employees', 'Compensation Groups', 'Compensation Items', 'Employee Types', 'Pay Plans', and 'Workforce Attributes'. A context menu is open over the 'Employees' table, showing options like 'REPORTS', 'Publish', 'Export as Excel', 'Compensation Item View', 'Natural Account View', 'GL Account View', and 'GL Account Detail View'. The table below lists employee details including Employee Number, Employee Name, Compensation Item, Employee Type, Hire Date, Employee Type, Position Description, Salary Class, and Annual Salary.

Employee Number	Employee Name	Compensation Item	Employee Type	Hire Date	Employee Type	Position Description	Salary Class	Annual Salary
15	Andy Watkins			10/09/2012	United Kingdom	Head of Product Delivery	Annualized	1
150Product				08/01/2026	United Kingdom	Chief Architect	Annualized	1
2	Fawzi Fares			07/01/2010	United Kingdom	Chief Architect	Annualized	1
3	Alex Fuller			07/01/2010	United Kingdom	CTO	Annualized	2
385	Damir Perovic	PRODB0	340-100 - Engineeri...	05/01/2015	Germany	Lead Product Developer	Annualized	
40	Flavio Melo	PROD11	340-100 - Engineeri...	08/07/2017	United Kingdom	Front End Developer	Annualized	
44	Robin Turmwood	PROD12	340-100 - Engineeri...	11/06/2017	United Kingdom	Senior Product Develop...	Annualized	
64	Simon East	PROD14	340-100 - Engineeri...	01/02/2019	United Kingdom	UI Developer	Annualized	



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# How CloudSense uses WFP day to day





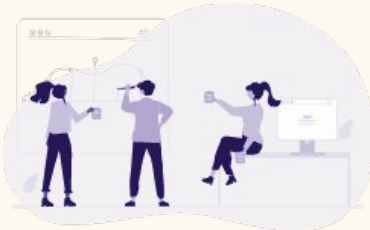
# How CloudSense Uses WFP day to day



- Monthly people trackers by function



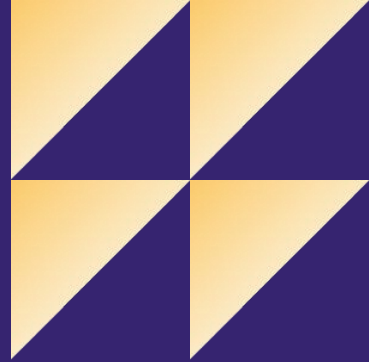
- Regional professional services monthly forecast



- Ad hoc planning and scenarios



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# What's next for CloudSense and Planful

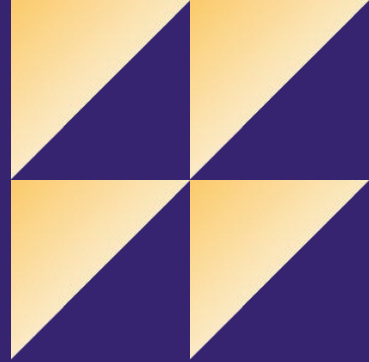


# Phase 4 and beyond: WFP





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# Closing summary



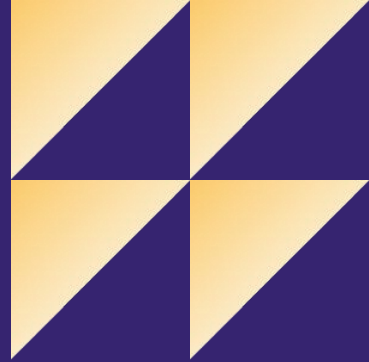
# Closing Summary

- Time – both in planning and in reviewing
- Greater integrity in information
- Transparency and visibility across the business
- Improved decision making
- Winning the trust of stakeholders

What  
CloudSense  
has gained  
from WFP



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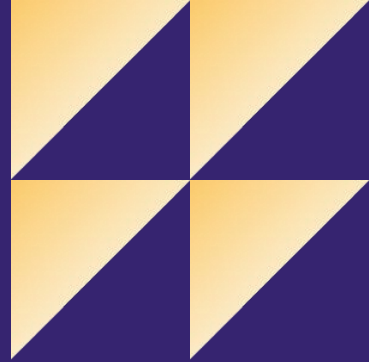


# Q&A





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Thank you!



# By the numbers

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Value,  
Information

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