planful
perform

Take Your FP&A from 0-100 Real Quick

Billy Leigh, Practice Leader, Embark
Will Fuller, Managing Director, Embark
Zeke Richardson, Senior Manager, Embark

embark.

Speakers

Billy Leigh
Practice Leader
Finance Transformation
Embark

Will Fuller
Managing Director
Finance Transformation
Embark

Zeke Richardson
Senior Manager
Accounting Advisory
Embark

embark.

planful

Meet your speaker

Billy Leigh, Practice Leader, Embark

- Joined Embark in 2021
- Leads the Finance Transformation Practice - a team focusing on Tech Enablement, Data and Analytics, Finance Advisory, Integration Services and Project and Change Management

embark.

planful

Meet your speaker

Will Fuller, Managing Director, Embark

- Joined Embark in 2022
- Enjoys helping CFO's solve their most complex issues to accelerate data-driven actionable insights that enable senior leaders to make informed business decisions

embark.

planful

Meet your speaker

Zeke Richardson, Senior Manager, Embark

- Joined Embark in 2019
- Passionate about financial modeling and process improvement
- Started career at Grant Thorton's Audit practice and Trinity Industry's FP&A team

embark.

planful

Agenda

- Today's FP&A Challenges
- Developing an FP&A Strategy
- Putting the FP&A Pieces Together

planful perform

Today's FP&A Challenges

embark.

90%

Digital transformation projects fail at an alarming rate...
90% fail to deliver measurable ROI.

"3 Main Reasons Why Big Technology Projects Fail"
Forbes March 2021

embark.

planful

By the numbers

75%

of ERP projects fail, Gartner Group

95%

of product innovations fail, Clayton Christensen

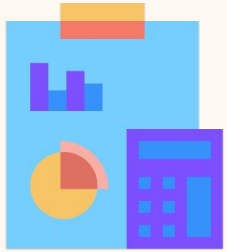
30%

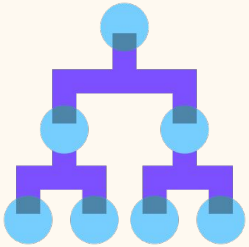
of digital transformation projects result in improved corporate performance, McKinsey

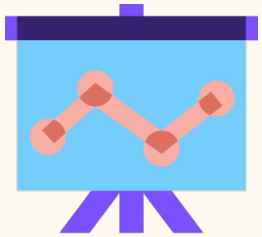
"3 Main Reasons Why Big Technology Projects Fail"
Forbes March 2021

embark.

planful







"3 Main Reasons Why Big Technology Projects Fail"
Forbes March 2021

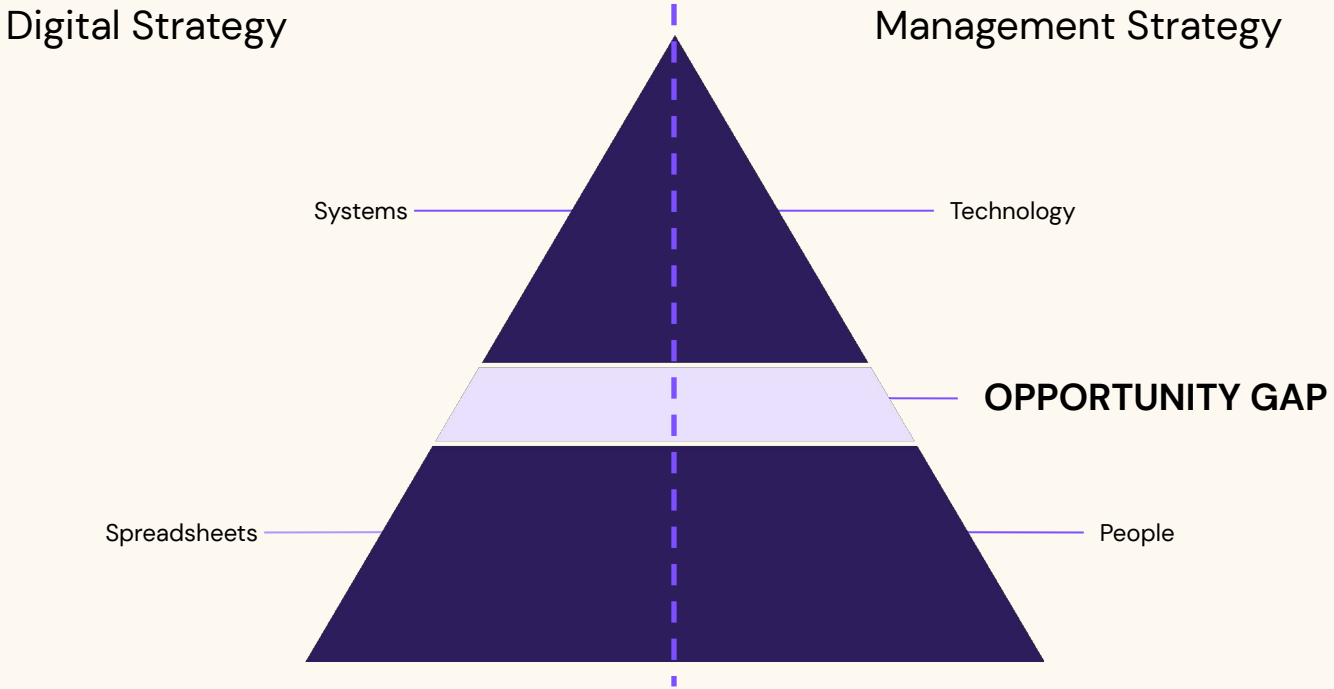
embark.

Why do so many of these big enterprise technology projects fail? 3 main reasons:

1. Companies don't have the deployable talent
2. Executives do not have the bandwidth to support big tech projects, and
3. Most corporate cultures are actually anti-technology (in spite of rhetoric to the contrary)

planful

The Typical Organization



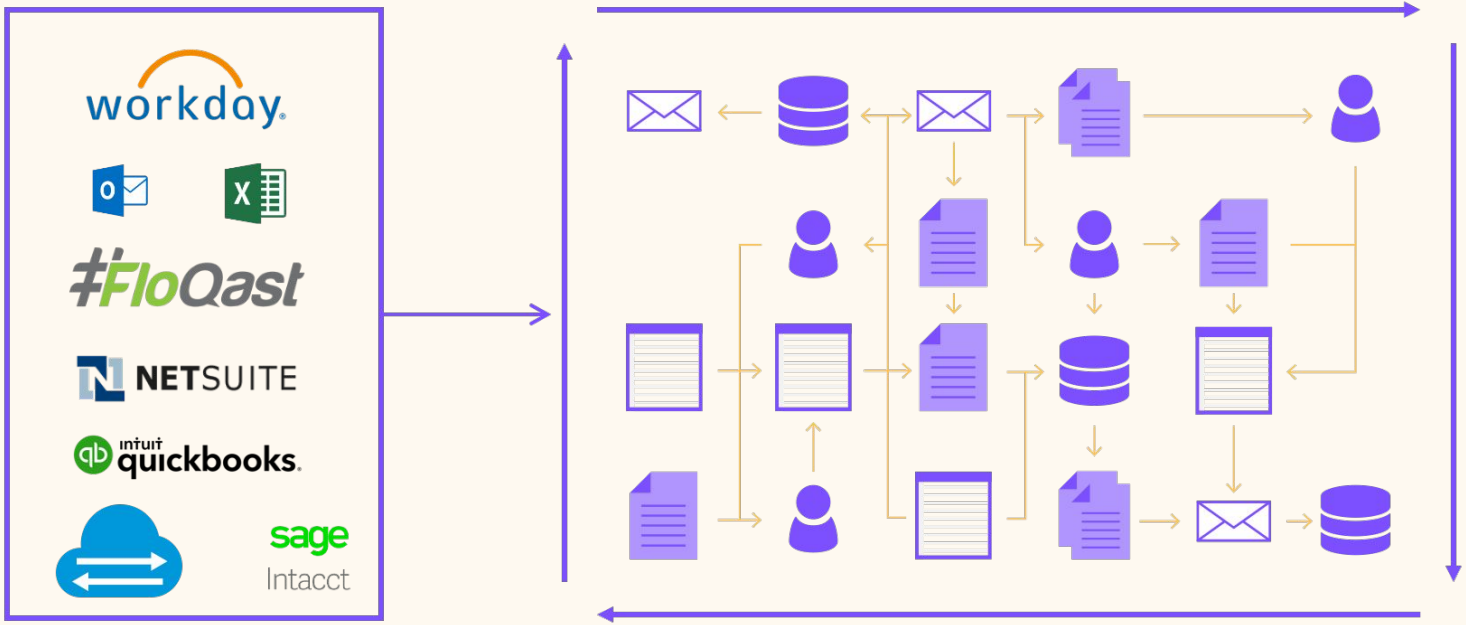
embark.

planful

The Middle Layer

Capture Data (Internal / External)

Transform Data (Blend, Cleanse, Prep) → **?** → **Report**



embark.

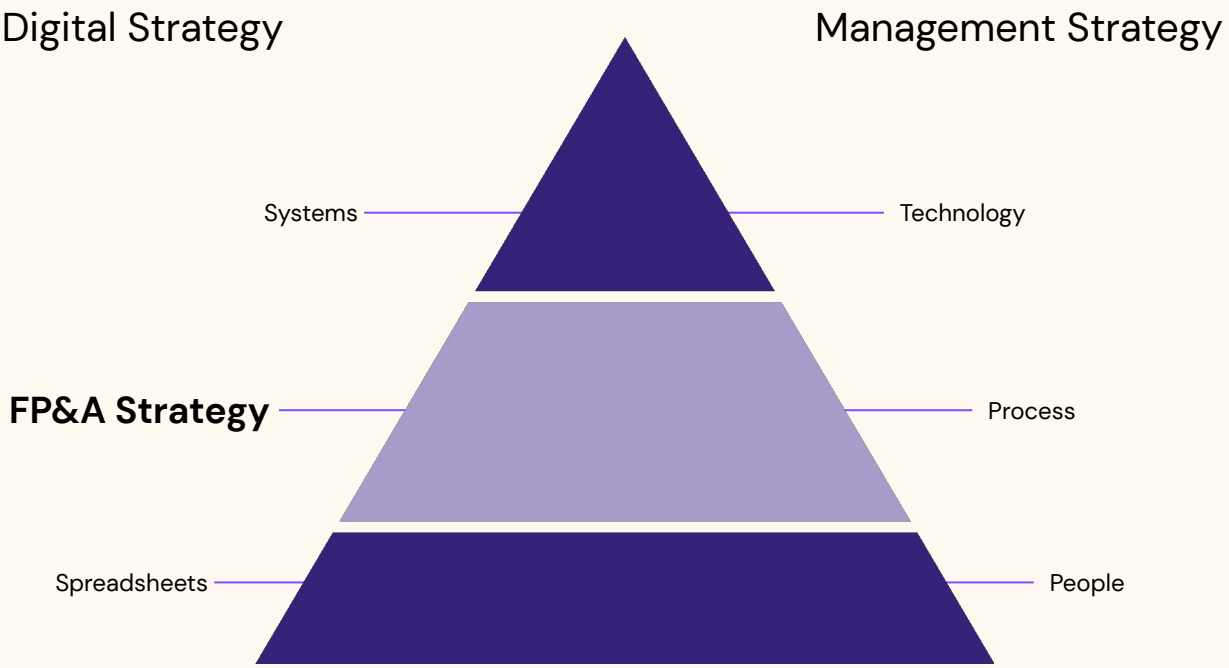
planful

planful perform

Developing an FP&A Strategy

embark.

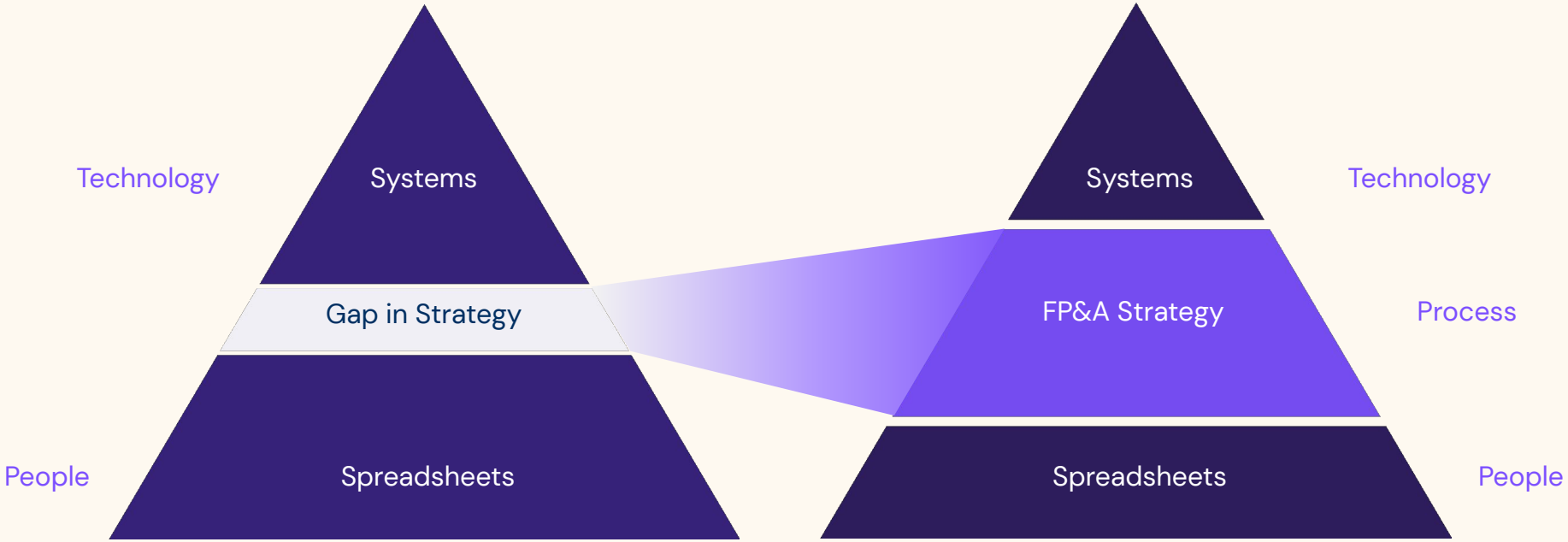
The FP&A Strategy



embark.

planful

Filling the Gap with a Middle Layer Strategy



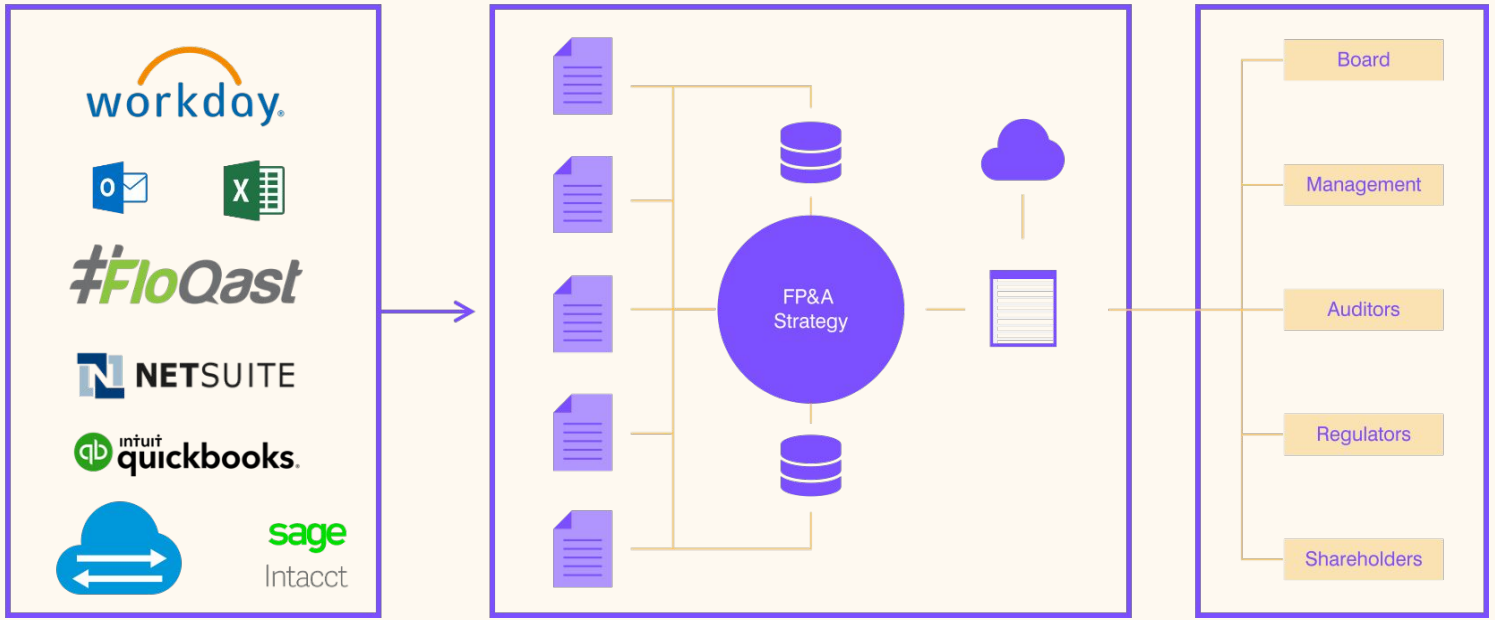
embark.

planful

Automating the Middle Layer

Capture Data
(Internal / External)

Transform Data (Blend, Cleanse, Prep) → **Report**



embark.

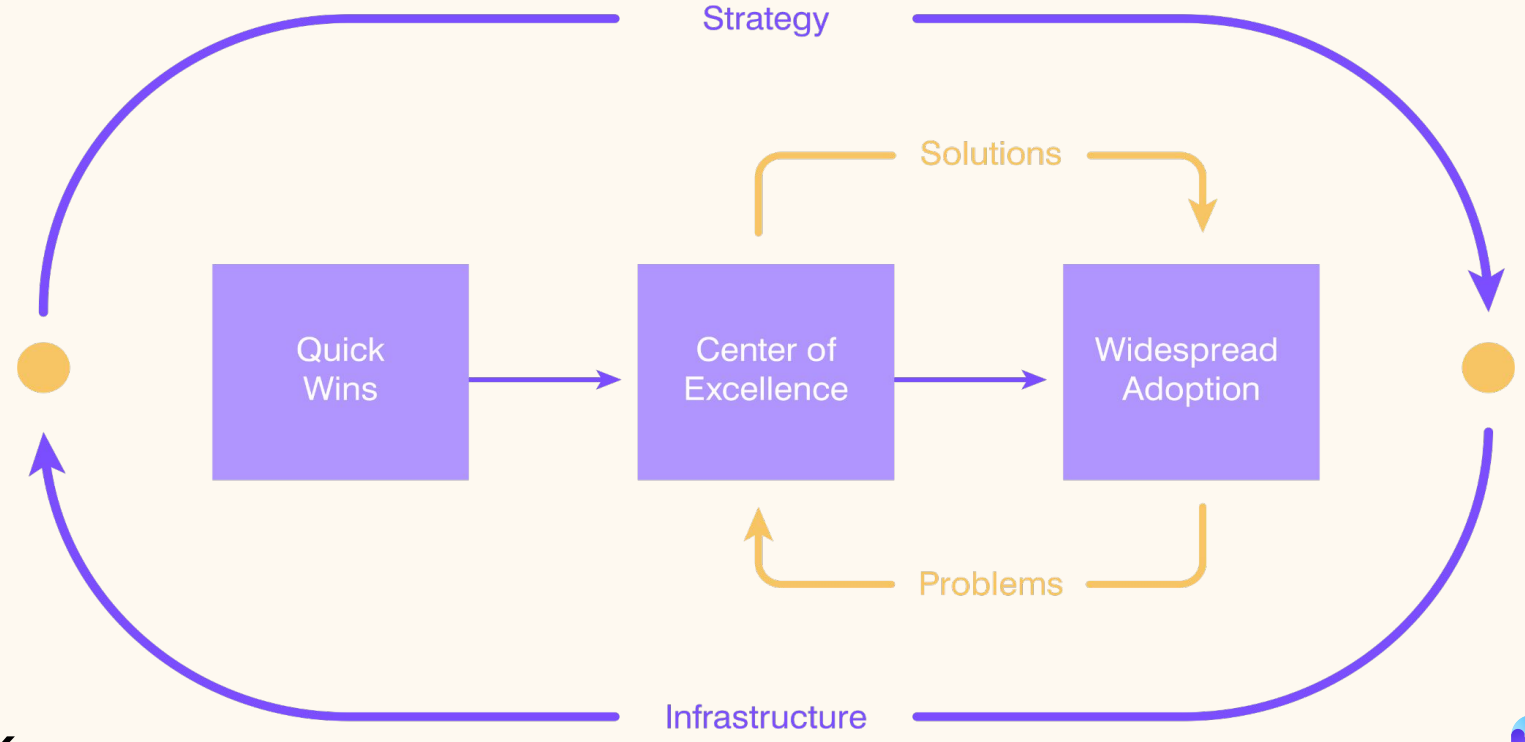
planful

planful perform

Putting the FP&A Pieces Together

embark.

Embark's Transformation Strategy



embark.

planful

Q&As

embark.

planful

Thank you!

Connect with us!

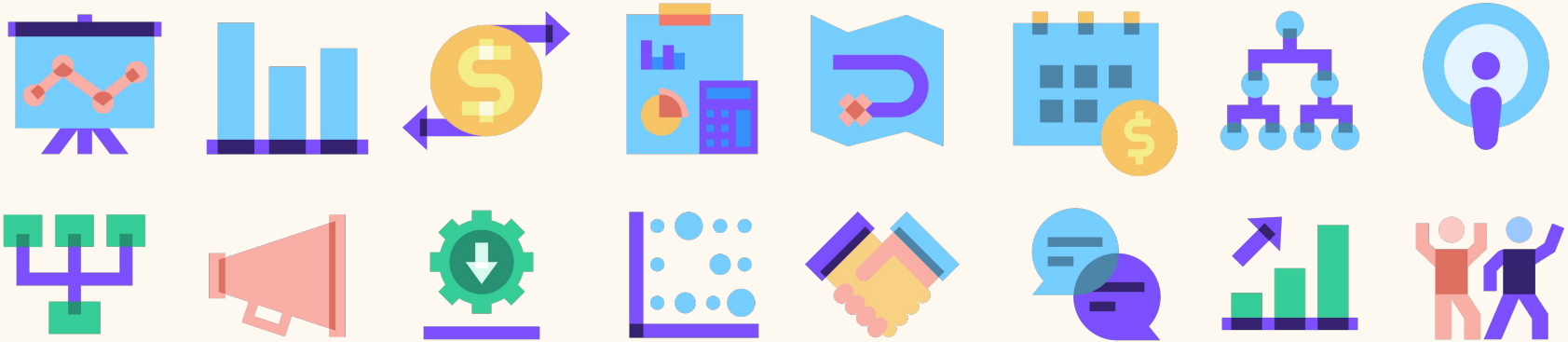
embark.

planful

Design Appendix

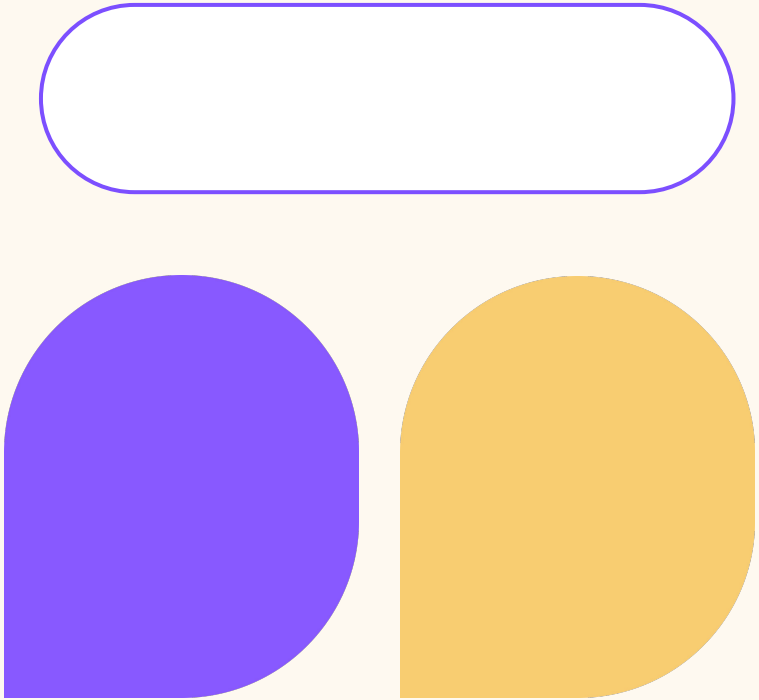
planful

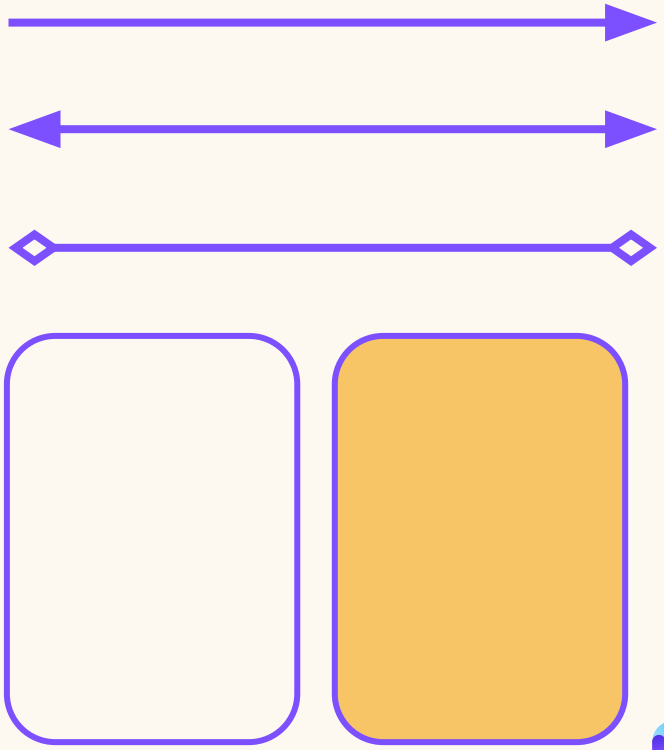
Iconography Bank



planful

Arrows & Shapes





planful