CloudSense

CloudSense Brings Speed, Transparency, and Trust to Workforce Planning

CloudSense provides configure-price-quote (CPQ) software solutions to help businesses launch faster, sell more, and fulfill products faultlessly across the entire customer lifecycle. But, with a rash of organizational changes pushing the Office of the CFO to forecast and reforecast with greater speed, its spreadsheet-driven processes kept the team from effectively responding to executive requests. It was time for a dramatic shift in the company's workforce planning process.

Challenges

The combined impact of the pandemic, the Great Resignation, and internal reorganizations stressed CloudSense and its finance team. Constant reiteration of scenario plans, costs restructuring, and people management changes — all managed via spreadsheets — consumed too much time and invited too many errors. Add in increasing insights requests from executives and the board, and CloudSense had to find a better way.

"With our Excel setup, the process was all-consuming and prone to error," recalled Jane Watkins, VP Finance at CloudSense. "We've got manual entry leading to errors and inefficiency. We're exporting from various different systems. We're cutting and pasting data into any number of models, and from there into summaries. It was getting quite messy."

While the spreadsheet-driven process was frustrating for Finance, it was more so for the business. Finance feared an errant click could break a formula or wreck an entire analysis, so the team used separate spreadsheets to share data with managers. But, since the manual process took so long, it was often out-of-date before it was delivered.

"We couldn't have done that in Excel that quickly, just really couldn't. Planful makes it easier and more efficient."

– Jane Watkins, VP Finance at CloudSense

"By the time we actually had it and then disseminated it to the stakeholders, they would say, 'Hang on a minute, that guy's left,' or 'That person's had a pay increase,'" Jane said. "That just led to more frustration from the managers, and it undermined our credibility."

Protecting complex spreadsheet models, worrying about the security of shared data, and spending precious time searching for errors and anomalies highlighted the limitations of the processes at CloudSense. A change had to be made, especially if Finance wanted to collaborate more closely with the business and be more responsive to questions from leadership.

"Finance needed to focus on business partnering, and empowering the business to own their data and be accountable for their performance," added Jane.

Solutions
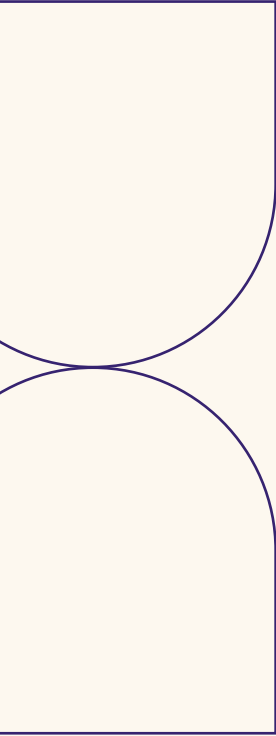
CloudSense was already in the process of updating its accounting system, so chose to add a workforce planning solution at the same time. With data integration, collaboration, reporting, and security as its key requirements, it found a winning solution in [Planful Workforce Planning](#).

"Planful was offering us multisource data integration so we could take information from our accounting, CRM, and HR systems," said Jane. "The cloud-based collaboration was exactly what we wanted to empower people, both within finance and the wider business, to get involved in the planning process. Another big point was ease of reporting, distribution, and transparency that would lead to better decision-making."

CloudSense took the combined accounting system and Planful Workforce Planning implementations to reevaluate its chart of accounts and bring more business-centricity into it. As Finance was in the midst of its 9+3 rolling forecasting cycle, the dual deployments were a daunting task. But, as Jane explained, Planful's streamlined deployment process made it possible.

"Planful made it work," said Jane. "That's indicative of the fact that Planful is actually a pretty easy system to implement. Now we're using Planful Workforce Planning on a daily basis, enhancing our reporting, and doing regional services forecasting, which we weren't doing before. That is directly facilitated by Planful."
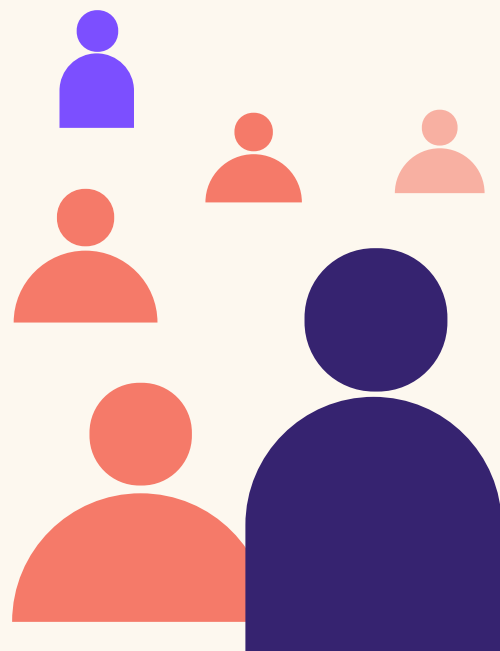
From manually downloading data from multiple systems, manipulating it and disseminating it across multiple spreadsheets, and working to deal with constant changes, CloudSense now has a platform from which it can empower executives with accurate, up-to-date workforce insights. It has taken advantage of this new-found flexibility and power to share more data with the business, expand how it tracks roles and employees, and, based on feedback from the business, generate new insights based on locations and roles.

"Planful helps us make changes and see the impact on our P&L and cash flow," added Jane. "If we look at our assumptions and think we need to amend them, it's literally a few clicks. We couldn't have done that in Excel that quickly, just really couldn't. Planful makes it easier and more efficient."
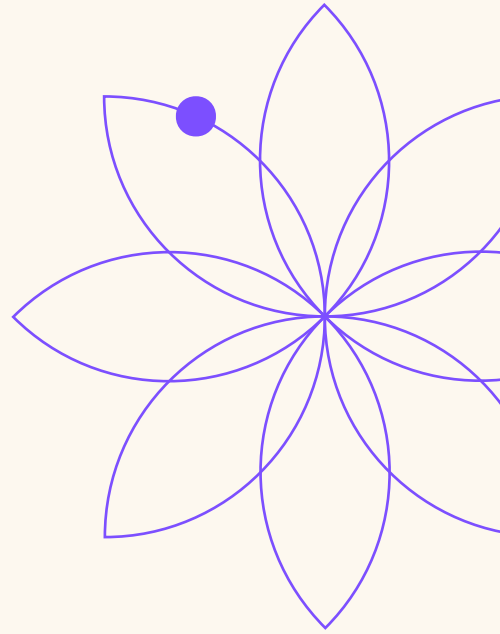
Results

Speed to generate insights in a fraction of the time

Planful Workforce Planning puts CloudSense data quickly into the hands of Finance so they can deliver insights to the business and executives without delay. And, when new what-if scenarios are requested or conditions change, the models can be updated in just a few clicks.

Jane said: "For our bonuses, we might want to forecast the overall payout. We can assume we're going to make a 75% payout or see the impact if we pay out a 100%. It's great to be able to make those quick changes on the fly."

## Transparency to collaborate over shared business insights

Changes come fast for CloudSense, so Finance is always pushed to revise models and forecasts. Planful gives CloudSense an easy-to-use platform where updates can be quickly made and pushed out to stakeholders.

Added Jane: "Our investors and our board love to make last minute changes, always asking, 'What if?' We've also found that we're using Planful Workforce Planning when we're doing our reviews with our execs. With Planful Workforce Planning, we're literally sitting with somebody and making those changes on the fly."

Trust of the business to rely on Finance for guidance

Now that Finance can work more closely with the business, share more insights, and be instantly responsive to questions and scenario requests, the relationship dynamic has changed.

"We need to be very reactive about what's happening, particularly with the fluid situation with people," Jane explained. "Quickly making changes and being interactive with the VPs is something we just couldn't do before. I can't stress enough how much value that gives to the business and how it improves their perception of Finance because they see how much we can help them."
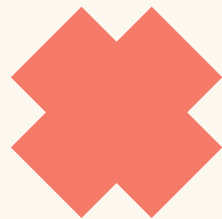
To learn more about Jane's Planful journey and how CloudSense uses Planful Workforce Planning, watch Jane's presentation from Planful Perform 2022.