

# Global business planning

## Case study

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### Abstract

A global technology supplier wanted to enhance its business planning by interlocking its top-down view with rolled-up plans from the field.

*ChangeBEAT* developed the planning process and supporting materials, then managed the creation of the field plans.

Fifty country and district plans were created worldwide to a standard format and then rolled up to give regional views – a vital prerequisite to executing the company's strategic plans.



## Background

A global technology supplier wanted to strengthen its strategic planning processes by interlocking the corporate view with that of the field units. It would thus move from a completely top-down process to one where the field provided their insight into market requirements, and where the top-down plan better reflected the changing needs of the market.

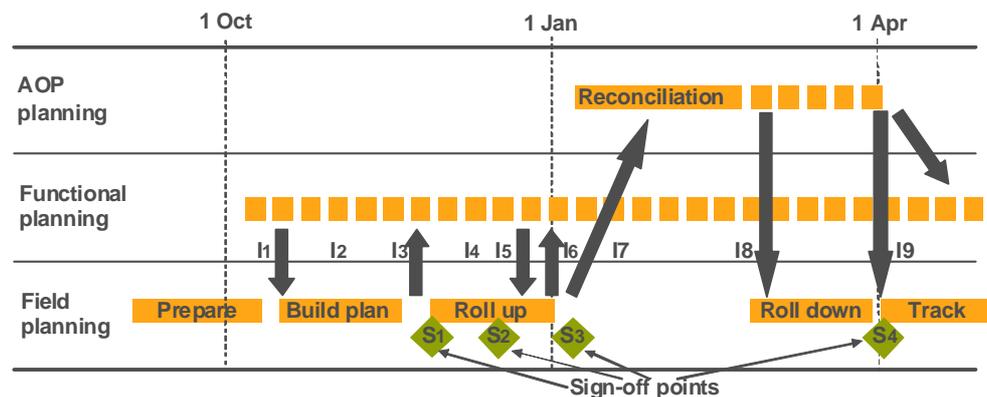


Fig 1: Roll up, roll down timetable

To achieve this goal they needed to enhance and automate their field business planning process and then to roll up the field unit plans at a regional and global level.

## The approach

The technology supplier had worked with *ChangeBEAT* to develop the business planning format for earlier work in EMEA and so the Global Programme Manager called on *ChangeBEAT* again.

The team took the following approach

- Surveyed the major stakeholders to ensure buy-in and gather the business requirements
- Refined and enhanced the business plan templates, which included a document, presentation view and a spreadsheet for numeric input
- Developed automated tools to aggregate financial and market data
- Developed a range of support materials, tools and guides
- Built an information base to support the field in successfully completing the business planning process
- Planned and managed the creation of the business plans and their roll-up into a consolidated report



## How did *ChangeBEAT* help?

*ChangeBEAT* made use of *WingBEAT*<sup>™</sup>, its consulting methodology, to manage stakeholders and develop the requirements, and then its *ExecKIT*<sup>™</sup> business planning materials to carry out the programme effectively and efficiently.

## The results

The programme successfully met tight timescales and achieved the primary objective of feeding the planning and budgeting cycle.

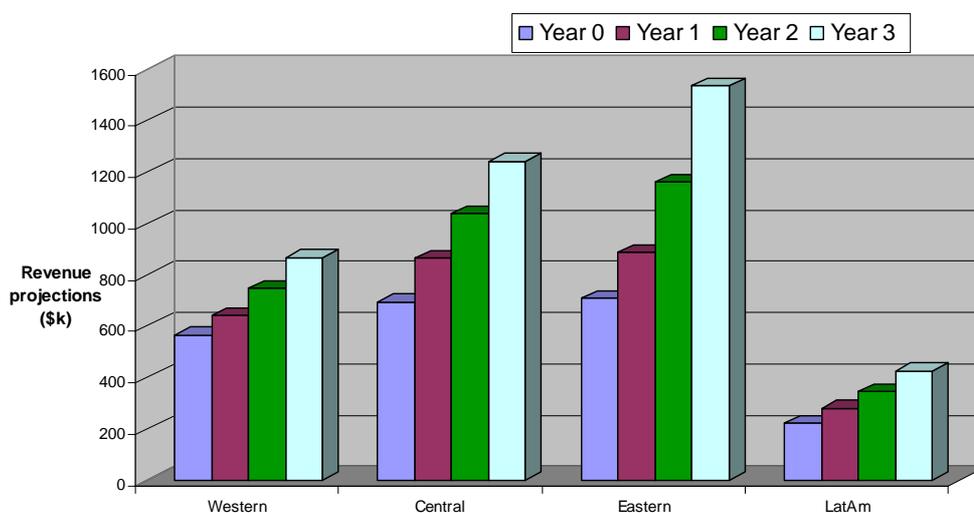


Fig 2: Four year plan by district and geography

Fifty country and district plans were created worldwide to a standard format and then rolled up to give regional views – a vital prerequisite on the company’s journey to increase its professional services and software sales.

## What the customer said

The Global Programme Manager commented, “*ChangeBEAT* are a team of great consultants with a great process. They have a comprehensive suite of business planning tools that they tailored for our programme and they showed commitment and hard work against a tight deadline in bringing the exercise home on time.

“Above all they are team players and a pleasure to work with.”



*ChangeBEAT* defines, develops and executes change programmes that help achieve enduring business benefit rapidly and reliably. Our people have practical field experience, and are equipped with *WingBEAT*, our proven change methodology, and our extensive tools. We are professional, pragmatic and action oriented.

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