2020 Innovation & Transformation Awards

Strategy & budget planning join up the business

See how strategic resource models are evolving and driving continuous improvement, consolidated onto a shared platform with Finance, fast & flexible, with a single trusted source of data.

Summary

Learn how the Planning Team at RSA has developed as a trusted partner, with a place at the top table. It's been a strong period for planning, with 15% efficiencies, rising engagement and hundreds of hours saved in the annual budget planning process. The new, standardised planning models evolved in agile sprints, with stakeholder scrum teams. It's quicker and seamless, with a continuous improvement ethos. This creates flexibility, agility and confidence in the plan – serving 27 business areas, from Sales to Claims, Front to Back Office. Models have been simplified, automated and rebuilt in Anaplan. Savings in analyst time alone yield a compelling ROI, with further flowthrough benefits later in the planning cycle and for the operation. Analysis can be turned around instantly or in hours, not weeks. It's so good because the key data is always there, with a single model framework and robust governance.

Key Initiatives

Connected planning builds confidence in the plan

Over the last three years, workforce resourcing strategy increasingly shapes business plans, as the resource planning team came to be a key player in company-wide business planning at RSA. A critical step has been building strategic resource models using the approach and system (Anaplan) used by Finance and 'baked in' to the corporate process. By stripping down and re-building 30 models into one single framework, planners created visibility at a detailed level for operating model decisions, that wasn't practical before. As a result, the level and speed of planning capability has been honed and linked with function driving people planning grow stronger. In Anaplan, Finance and Planning have separate models, but can share the same data and programme in the same language, with data/assumptions instantly available to each other. Furthermore, people share a mindset about planning and commit to shared outcomes. This helps to connect changes in the operating model with positive impacts on colleagues, customers and business – and the business can tackle challenges or resource shortfalls before they happen. "So quick" "No pain points" "Automated" "Technology does the heavy lifting".

Joined up: benefits flow throughout the planning cycle

Investing in strategic planning, the top end of the planning cycle, also drives downstream benefits in line with The Forum's latest best practice framework. This involves the whole Planning Team, not just those using Anaplan. For instance, the central 'Data Hub' is another key step in delivering end-to-end planning, drawing information from WFM, ACD, CRM etc. This feeds into Anaplan, where the models are set up for evaluation, automatically connecting drivers and impacts. The automation in Anaplan, as well as IEX and EG, has given headspace for more analytical activity by planners in all areas. A huge variety of assumptions are reviewed using interactive models, applying business intelligence and mathematical manipulation, removing outliers and striving to always better understand the true drivers behind workload and behaviours. There are great meeting cycles and review points, meaning that the Planning Team and their stakeholders are aware of changes and data relationships. People can track numbers on their journey from long-term budgeting to on-the-day analysis. "Analysts can analyse" "There's time to really think".





"Never be satisfied with the status quo. We don't say 'can we do this?', we say 'how do we do this?' We're having a different kind of conversation."

Jenny Hayes, Head of Planning

"We're bringing everyone along on this journey, saying to a team: this is your system to use. Don't impose, engage." Gareth Willott,

Technical Best Practice Manager

"We can now turn around inputs so rapidly ... to agree the plan quicker and with far more confidence."

Rhydian Llewelyn, Finance Director, Claims

"It's been an evolution, we've always worked closely with the planning team but now we have greater connectivity between budget and planning teams."

Fiona Green, Home Claims Functional Leader



Raising Standards in Customer Operations

Confident: driving improvements in the operating model

Connected planning at RSA gives visibility to the impacts of different decisions, at a remarkably detailed level. Home Claims is a great example, needing huge resilience given the volatility resulting from climate changes. Previously, there was lots of multi-skilling, always difficult from a people and leakage perspective. Now the operating model has evolved, shaped by the way strategic resource plans have developed. People are more confident of the numbers and can better determine what's needed across the planning cycle. This has freed up time to invest in other systems (like IEX) and review other areas. For instance, shift patterns have improved from an agent perspective and parameters can be set to stagger breaks. And more flexible working requests are being accommodated. "We have just had the worst storms in seven years and our team are all engaged and happily working extra hours" "Attrition is much lower" "I'm so proud of what the planning team have done" "It's reshaped how we work".

Agile: evolving budget plans and continuous improvement

- The team's model is now a key tool in the company-wide planning process, with frequent budget reviews in place: weekly, monthly and quarterly. Furthermore, the team is adept at turning around multiple budget scenarios at an astonishing speed.
- Leaders focus on variance from budget and actions that mitigate this. Planning create understanding of potential impacts, risks, opportunities and financial performance. Part of many change projects, their analysis is built into the wider business plan in a measured way.
- Agile principles drive a continuing development of planning models. A 'minimum viable product' was delivered initially and now a continuous improvement ethos drives development of the strategic plan. 'User stories' show how the model should work and these are developed in Anaplan by 'scrum' teams with SMEs within the planning team.
- Crucially, new lessons were captured and learned every day, a lot of learning for a budget plan. Now the team's remit has expanded beyond traditional planning, with a key role in driving continuous improvement across the business in a data-led manner.

"So much quicker" "Go-to point for key KPIs" "Transforms recruitment speed" "We trust the data" "Really stress tested" "Sometimes, simple is the hardest thing to do"

"Combining effort and methodology enables a fluid and dynamic conversation with stakeholders."

Andrew McIntyre, Forecast & Capacity Consultant

"The intuitive nature of the model was what came out as key in the user feedback."

Ben Clark, Forecast & Capacity Consultant

"We have to balance various areas. Good planning helps navigate those nuances. Plans are accurate, with a more granular approach." Fiona Green,

Home Claims Functional Leader

"We gathered hundreds of user cases. We could refer to each user story and demonstrate how it does what each user had asked for."

Gareth Willott, Technical Best Practice Manager

"We can automatically demonstrate what would happen to staffing in a given scenario with a high accuracy. It can be a decision-making tool."

Helen Goddard, Forecast & Capacity Leader

"We were making sure the wider team understood, linking back so they were engaged, knowing it was going to be what they'd asked for." Hilary Williams,

Service Level Planner

Results

- Colleague engagement up 10% year on year, now 71%
- 100s of hours saved for every quarterly budget forecast
- Effort halved for the Monthly Business Planning Review
- Bridged a 5FTE resource gap in the team

capacity capacity increase

"Three years ago we weren't used to agile. We hadn't anticipated the huge cultural change required. This has been a cultural journey."

Jenny Hayes, Head of Planning

"We find people are often cautious to try new things. This team jumped in with both feet. They have a 'can do' attitude. The culture of continuous improvement has been key to success."

Heidi King, Customer Success Business Partner at Anaplan

"There's much clearer visibility on where time is spent, we can see the impacts quicker and get signoff quicker. We are far more granular at this strategic plan stage."

Rhydian Llewelyn, Finance Director, Claims

RSA is one of the world's longest standing general insurers. Planning support a virtual environment, with front & back office and blending of sales, service & claims. Technologies include Anaplan, IEX for WFM and Eg for the back office.