Operational Planning Team: One View, One Language, One Plane



A fragmented landscape

Retail Operations operated across three divisions, each with its own financial plans, project roadmaps and capacity models. Meetings were structured differently. Metrics were defined locally. Financial views were largely retrospective and often adjusted quarterly.

This fragmentation created friction. Reports conflicted. Calculations varied. Shrinkage allowances and performance measures were not aligned. Cross-divisional performance was difficult to compare and consistent targets were hard to set. Time was absorbed in reconciling spreadsheets rather than shaping decisions. The absence of a single, consistent view meant that even routine conversations required interpretation. Debates often centred on whether numbers were green or red, rather than what action should follow.

Establishing the foundations

The Operational Planning Team brought together Project, Finance, Operations and Planning colleagues to create a unified approach across Retail Operations. Shrinkage allowances and performance metrics were standardised across all business plans. Definitions and calculations were aligned so that measures carried the same meaning in every division. A single data source combined operational, financial and project metrics, creating consistent visibility from individual team cost codes through to entity level. Formal governance and agreed timelines for decision-making were embedded, providing clarity on how changes flowed into plans and when decisions were taken.

Embedding ROKIT

At the centre of the programme sat ROKIT, connecting Resource, Outcomes, KPIs, Investment and Transformation into one structured framework. ROKIT created a direct link between change initiatives and the benefits they were expected to deliver. Transformation activity was mapped to measurable outcomes, enabling prioritisation based on impact, capacity and financial return.

Benefits were built into workforce and financial plans in a controlled way, ensuring that projected gains were reflected in future resource models without introducing additional delivery risk. This allowed investment and transformation decisions to be considered alongside operational performance, rather than separately. The framework strengthened collaboration between Planning, Finance and Transformation teams, grounding conversations in shared data and aligned assumptions.

Moving to forward-looking planning

Hierarchical roll-up and drill-down reporting provided visibility from executive level through to individual teams. Monthly expense reporting became more transparent, and leaders were able to model scenarios before committing to delivery.

Real-time re-budgeting supported strategic decision-making at pace. Recruitment decisions aligned with financial forecasts and agreed transformation priorities. End-to-end visibility of cost and resource created a clear line of sight from investment through to operational impact.

Shadow spreadsheets and manual reconciliation reduced significantly as reporting was generated from a common foundation.

Through standardisation of shrinkage, effectiveness and occupancy measures, the team identified projected efficiency gains of 41.1 FTE, including 23.6 FTE from shrinkage alignment and 19.39 FTE from effectiveness and occupancy consistency.

A common language for change

Conflicting reports and inconsistent definitions were replaced with one consistent narrative across directorates. Visibility across divisions improved, enabling more informed strategic choices.

ROKIT strengthened the organisation's ability to connect benefits to delivery, embed change into plans with confidence and prioritise transformation activity with clarity.

For frontline colleagues, consistent measures created fairness and parity in performance and respite treatment. For leaders, the framework provided the structure required to balance cost, capacity and change. The Operational Planning Team has created a shared operating language across Retail Operations, enabling confident decision-making and sustained transformation at scale



