

## Case Study

## Citation

Transforming FP&A with  
Workday Adaptive Planning

## Background

The Citation Group is an international provider of tech-enabled compliance and certification solutions to small to medium-sized enterprises (SMEs). Citation supports SMEs in the UK, Canada, and Australia, acting as a critical partner for over 120,000 businesses navigating the complexities of HR, Health and Safety, and Quality Certifications. With a history spanning over 30 years, Citation has expanded rapidly, particularly in the last 10–15 years, through double digit organic growth and an ambitious and strategic acquisition strategy.

David Rylance, Director of FP&A at Citation, leads a three-person FP&A team within a much larger Group finance function. As Citation continued its rapid growth, financial planning and analysis became increasingly complex. Previously, the team relied on spreadsheets to consolidate data from multiple business entities. As the number of acquired companies grew larger, managing financial data became cumbersome and time-consuming. The biggest challenge? A lack of change history tracking in spreadsheets, making it difficult to manage data accuracy and integrity.

Recognising the need for a robust, scalable solution, Citation selected Workday Adaptive Planning as its financial planning tool, with ICit Business Intelligence as its implementation partner.

## Implementation &amp; Partnership with ICit

ICit worked closely with Citation to design and implement a centralised financial planning system that addressed the challenges of rapid acquisitions and multi-entity consolidation. The initial build was complex due to Citation's unique structure. However, since working with Workday Adaptive Planning, the system has been significantly streamlined, providing Citation with an efficient and transparent financial planning solution.

During the implementation, the ICit team ensured a smooth transition by simplifying data structures and enhancing usability. One key benefit of ICit's hands-on consulting was helping Citation uncover the full capabilities of Workday Adaptive Planning – moving beyond simple data consolidation to advanced forecasting and strategic planning.



“ Workday Adaptive Planning has completely transformed how we manage financial data. What used to take days of manual effort is now automated, accurate, and accessible in real-time, giving us the clarity and control we always needed. ”

David Rylance, Director of FP&A, Citation

“ Previously, financial consolidation took a full day each month – one out of 20 working days. ”

## Key Benefits of Workday Adaptive Planning

### 1. A Single Source of Truth

By moving from spreadsheets to Workday Adaptive Planning, Citation now has real-time financial data in one centralised system. The risk of manual errors has been significantly reduced, and data integrity is ensured with a clear audit trail of changes.

### 2. Enhanced Reporting with OfficeConnect

Citation is a private equity-backed business, making accurate and timely reporting crucial. Workday's OfficeConnect has transformed their reporting capabilities, allowing for seamless data integration with Excel, real-time updates, and enhanced financial transparency for its most important stakeholders.

### 3. Time Savings & Efficiency Gains

Previously, financial consolidation took a full day each month—one out of 20 working days. Now, each business entity is responsible for inputting its own data, significantly reducing the FP&A team's workload. The time saved is now being reinvested into more strategic analysis and decision-making.

### 4. Faster, More Accessible Data for Decision-Makers

With Workday Adaptive Planning, Citation's senior leadership can now access real-time financial insights at the click of a button. This improved visibility aims to deliver faster, data-driven decisions that support the company's growth strategy.

### 5. Future-Proofing Financial Planning

The first phase of implementation focused on creating a single source of truth. Moving forward, Citation is working towards leveraging Adaptive Planning's advanced budgeting and forecasting features to improve long-term strategic planning. The team updates forecasts twice a year and aims to refine its budgeting processes for 2026 using Workday's robust modeling capabilities.

## Expanding Workday Adaptive Planning Across the Business

Currently, Workday Adaptive Planning is used primarily by the Group finance team and local finance teams within Citation's 18 business entities. While non-finance departments are not yet utilising the platform, there is potential to expand its use—particularly for Citation's data team, which could benefit from integrating financial and non-financial data for deeper business insights.

### Business Impact & Future Plans

Since implementing Workday Adaptive Planning, Citation has experienced significant time savings, improved data accuracy, and enhanced financial transparency. The centralised system has also improved collaboration across business units, ensuring that data is entered and maintained by those closest to the numbers.

Looking ahead, Citation plans to further optimise its financial planning processes by exploring additional Workday Adaptive Planning capabilities. With ICit's continued support, the company aims to integrate more advanced forecasting and scenario modeling to drive strategic decision-making.

“ Workday Adaptive Planning has not only streamlined financial reporting and budgeting but has also positioned the business for scalable, data-driven growth. ”

As Citation continues to expand, its FP&A team is now empowered with the tools and insights needed to navigate the complexities of a rapidly evolving business landscape.

With a strong foundation in place, Citation is well on its way to unlocking the full potential of Workday Adaptive Planning, ensuring that its financial strategy aligns seamlessly with its ambitious growth trajectory.

## Ready to find out more?

We have helped many businesses around the UK implement a range of Financial Planning & Accounting features, that are offered by **Workday Adaptive Planning**.

Our team of specialist **Workday Consultants** can discuss your exact business needs, advise you on how to implement Workday Adaptive Planning within your finance practices and also offer training to those staff who will be using the software day-to-day.

## Get in touch today

To find out more about the benefits of Workday Adaptive Planning, or ask any specific questions about how it could improve your current financial software options, please get in touch with us today.

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