

## Case Study

# Transforming Budgeting and Forecasting for a Global Professional Services Leader

Supporting the planning maturity required of a global, private-equity-backed organisation.



## Background

HKA is a global professional services organisation with offices around the world. Following a second round of private equity

investment in 2022, the business entered a period of rapid growth that placed new pressure on its existing planning processes.

Matthew Ruffley, Global Finance Business Partner at HKA, joined the organisation two-and-a-half years ago to enhance its budgeting model, which at the time was built entirely in Excel. It quickly

became apparent, however, that the global nature of the business made spreadsheet-based planning increasingly difficult. Managing “hundreds and hundreds of files” across regions created challenges with version control, consolidation and collaboration. These were challenges that would only intensify as the business continued to grow.

## A global organisation limited by spreadsheets

Excel had long been the backbone of HKA’s planning activity, but as the organisation expanded, the limitations of a dispersed, manual approach became clear. While the calculations themselves were manageable, the process required constant coordination across different offices and time zones, making it difficult to maintain consistency and accuracy.

The finance team needed a more structured, scalable way of working—one that could support collaboration, provide a single source of truth, and reduce the manual effort involved in producing budgets and forecasts for a global, PE-backed business.

## A cultural shift away from ingrained spreadsheet habits

Like many finance functions, HKA had a deeply embedded spreadsheet culture. Transitioning to Workday Adaptive Planning required a significant mindset shift: moving from the open flexibility of Excel to the controlled environment of a dedicated planning system. Early transition challenges were rooted not in the software, but in the natural adjustment required when adopting a new way of working.

## Selecting Workday Adaptive Planning with ICit

HKA undertook a comprehensive market review before selecting Workday Adaptive Planning as its new planning platform. The decision was strongly influenced by the solution’s reputation as a market leader and by Matthew Ruffley’s positive experience with the tool in a previous role. Workday’s pre-sales team further reinforced this choice through a highly consultative, client-focused approach that helped HKA understand how the platform would meet the needs of a global organisation.

HKA subsequently chose ICit Business Intelligence as an implementation partner, selecting the team for their deep experience in the professional services sector, cultural alignment with HKA, and their collaborative, face-to-face working style. This partnership formally began in March 2024 with ICit commencing implementation in October.



## A Focused Phase One Approach

From the beginning, HKA and ICit agreed to take a tightly scoped approach to Phase One. Rather than immediately redesigning processes, the team focused on replicating the existing Excel-based budgeting model within Workday Adaptive Planning. This provided a familiar starting point for users while laying the technical groundwork for future development.

By keeping the scope narrow, the project delivered value quickly without overwhelming teams during the transition away from spreadsheets. It also gave finance early wins, which were crucial for building confidence in the platform and demonstrating its long-term potential.

## Embedding Adoption and Building User Confidence

Adoption needed to be managed carefully to support this cultural shift. ICit refined key aspects of the model and made it easier for users to work within Workday Adaptive Planning. These adjustments – focused on simplifying workflows and enhancing usability – were instrumental in building user confidence.

The real turning point came during HKA's most recent budget cycle, when the organisation formally moved away from Excel and committed fully to using the planning platform. This step allowed teams to experience the benefits of a centralised, structured planning environment first-hand and greatly accelerated adoption.

## Business benefits

Although HKA is still in the early stages of its journey with Workday Adaptive Planning, the organisation is already seeing clear advantages:

- **Improved collaboration across regions**

Using one centralised system has enabled greater alignment and communication between HKA's global teams.

- **More standardised planning processes**

Workday Adaptive Planning has introduced a consistent and controlled way of working, reducing variability in how different teams approach budgeting and forecasting.

- **Efficiency gains and reduced manual effort**

The move away from highly manual, linked spreadsheets has relieved the finance team of time-consuming consolidation work and reduced the risks associated with version control.

- **A strong foundation for future growth**

The first phase has given HKA the necessary learnings and confidence to begin building more sophisticated models and processes within Workday Adaptive Planning.

## Working with ICit

ICit has played a vital role throughout HKA's planning transformation. Their understanding of the professional services environment, combined with a collaborative and hands-on approach, helped shape a deployment strategy that balanced ambition with practicality. ICit took the time to understand the nuances of HKA's global budgeting process and ensured the early system design reflected the realities of how the finance team worked.

### 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.