



# Qubix

FP&A SOLUTIONS SERIES

# FP&A Maturity Assessment

**Qubix has completed 1,000+ finance systems engagements, and to assist our clients in their continuous improvement, we have created an FP&A Maturity Assessment Framework. Now you can benchmark your current performance against the leading practice and execute a roadmap for change.**

## FP&A MATURITY ASSESSMENT

# Overview

**We have helped hundreds of finance leaders transform their FP&A functions. Benchmark your FP&A process maturity against the best today.**

We have measured a direct correlation between high-performance finance teams and the maturity of their *Plan to Perform* processes and systems. Our finance advisory practice has designed a framework to guide our clients through benchmarking current performance and the design of an intelligent roadmap to transform FP&A function effectiveness.

The FP&A Maturity Assessment was created by a team of ex "Big Four" veterans, qualified accountants, seasoned finance professionals and our systems implementation teams. The approach is appropriate for finance teams of all sizes and complexities.

### FP&A Maturity Assessment Benefits

#### Actionable roadmap

Unlike the deliverables you might expect from the "Big Four", our content is tangible, operational and accessible to a broad audience of stakeholders.

#### Drives positive change

The process brings teams together to explore improvements plans that impact people's development as much as they do finance processes.

#### Tangible business case

Every aspect of our work with finance leaders is focused on producing tangible change that results in evidence-based outcomes.

# Framework



## Assessment Workstreams and Target Vision

### Leadership

Thinking beyond the current period with a willingness to drive change, analytical thinking and innovation.

### People

Skills development plans and roles definitions mapped to the target process and operating model.

### Processes

*A Plan to Perform* framework which connects all planning & forecasting and their impact on ESG initiatives.

### Data & Insights

Predictive and prescriptive analytics is embedded into all core finance processes. The pervasive use of decisions-by-design.

### Systems

Extensive integrated self-service platforms with significant automation and collaboration across the business.

### Controls

Embedded controls, policies and structures underpinned by extensive alerting, validations and audit dashboards.

## FP&A MATURITY ASSESSMENT

# PROCESS

### Benchmarking Rating

Our team will facilitate workshops and interviews to assess sixty-seven different assessment areas to determine a maturity rating:



### Assessment Approach



**Benchmarking** - our assessment tools benchmark your performance in six framework areas to compare and contrast against the leading practices.



Our **Change Roadmap** is tailored to make improvements achievable with an intelligent design that results in one set of enhancements accelerating the next.



Our interactive **Business Case** builder will form the centrepiece of our assessment and analysis of the business case for change.



**Transformation Frameworks** - are the critical assets that detail “how” to transition from the current state to the target future state.

## WHY WORK WITH QUBIX

# New Perspectives. Smarter Deployments.

Qubix is an award-winning global finance systems consultancy with 1,000+ successful ERP, Performance Management and Analytics engagements.



### **New Perspectives**

Our consulting team is comprised of highly experienced and technology-driven change leaders. With 1,000+ engagements across a spectrum of industries and business processes, we bring learned intelligence and techniques to every customer scenario.



### **Smarter Implementations**

Not every client needs a radical transformation of their finance systems, and sometimes what is required is the speedy deployment of a proven approach with minimum fuss. We can help in both scenarios and can grow with you as your needs change.

## HOW WE CAN HELP?

# Business process knowledge and industry specific experience

- Driver-based Planning & Budgeting
- Strategic Workforce Planning
- Capital Expense Planning
- Project Financial Planning
- Financial Close Automation
- Account Reconciliation
- Cash Flow Forecasting
- Franchise / Group Reporting
- Board & Management Reporting
- Regulatory Reporting (GAAP / IFRS)
- Cost Allocations
- Customer Profitability
- KPI & Balance Scorecards
- HR Analytics
- Predictive Modelling
- M&A Modelling
- Debt, Liquidity & Capital Analysis
- Autonomous Data Warehouse
- Data Orchestration
- ESG Reporting



NatWest



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