



AAA Northeast Leverages Workday Adaptive Planning to Streamline Reporting, Improve Auditability and Manage Workflow



The Challenge:

The financial planning and reporting process at AAA Northeast was labor-intensive and time-consuming. AAA Northeast sought a more flexible, cloud-based financial solution that provided faster, easier, self-service reporting, better audit capabilities and a robust workflow process.

The Solution:

QueBIT collaborated with AAA Northeast to leverage Workday Adaptive Planning and seamlessly integrate the AAA Northeast ERP system, providing the desired efficiencies and transparency to the user base.

The Benefit:

AAA Northeast improved their financial planning and reporting process, consolidating over 200 reports, creating dashboards for easy KPI consumption, and simplifying planning module calculations.



About the Client

For over 100 years, motorists have relied on AAA – a name synonymous with world-class roadside assistance. AAA Northeast is one of the association’s largest clubs, providing a wide range of services including roadside assistance, insurance, loans, travel, discounts and rewards, and more to its 6.2 million members across Rhode Island, Massachusetts, Connecticut, New York, New Jersey and New Hampshire.

Addressing the Problem

AAA Northeast recognized the restricted architecture of their legacy solution as a primary financial planning, analysis and reporting tool was not sustainable to support the growing enterprise. Their goal was to identify a more modern, cloud-based solution, automating the planning process and providing the flexibility needed for better audit capabilities – all while improving workflow and streamlining reporting. AAA Northeast engaged QueBIT Consulting to strategically advise and implement the Workday Adaptive Planning Solution to support their entire FP&A processes, with the enhanced capability to incorporate actual and historical data from AAA Northeast’s ERP system.

The Solution

QueBIT recommended a two-phase project with the goal of delivering a series of quick wins and ultimately providing the necessary knowledge transfer so AAA Northeast could own and administer the system moving forward. Phase 1 focused on building out core structures, automating the actual data load process and the build of key financial reports. Phase 2 built upon the financial foundation results achieved in Phase 1 to support and automate the necessary planning models (personnel, revenue, expense and capital expense), workflow and consolidations for reporting purposes.

“It was very important to me that the implementation project focused on knowledge transfer and that we selected a partner who listened to our input. I felt as though most companies we talked to weren’t listening to us but that wasn’t the case with QueBIT! They listened to our input, and we collectively determined the best implementation approach based on our priorities, involvement and commitment. The results: we ended the project on track to kick off the budget cycle as scheduled and have the knowledge to adjust our budget models allowing for an agile budget process.”

Andrea Bernier, CPA, Director, Financial Systems, Finance & Accounting

Objectives of the Solution:

- Replace the restricted architecture and functionality of the existing system
- Adopt a more modern cloud solution to provide agility to plan, enhanced transparency, improved workflow and efficient reporting to support the business needs
- Enhance data integration between Workday Adaptive Planning and AAA Northeast's ERP System for data load automation
- Achieve real-time and near real-time results with improved system performance for both business users and system administrators
- Deliver a robust report environment by leveraging QueBIT's ReportWORQ solution

ReportWORQ for Workday Adaptive Planning

QueBIT's ReportWORQ is a dependable automation system for generating and distributing professional Workday Adaptive Planning reports on an ongoing basis. ReportWORQ allowed AAA Northeast to simplify the report builds for complex report package needs which included Actual vs. Budget and Trend data for over 20 lines of business. The presentation and ordering of the data was critical to meet the needs of the club, requiring separate report builds for each line of business. With ReportWORQ, AAA Northeast was able to get the number of reports that needed to be built down to two while achieving the same report packages. By leveraging the parameter and collation options in the tool, it allowed AAA Northeast to be more flexibility and agile with reporting changes in the future. Another challenge for AAA Northeast was the time it took to generate the report packages was in excess of an hour with the old reporting tool. With ReportWORQ, the reports now run in minutes, allowing for multiple iterations to be run in a quick time frame when changes are requested.

Leveraging Workday Adaptive Planning Solution and QueBIT's ReportWORQ Product, AAA Northeast Was Able to Achieve the Following Benefits:

- Automated the data load process
- Delivered ease of use and reduced maintenance
- Reduced the total time of reporting and planning processes
- Significantly decreased the number of monthly reports
- Created detailed report packages for Executives and Board members with ReportWORQ
- Enhanced and simplified workforce planning calculations (scaled down to 1 calc per account vs. 4 or 5)
- Improved the audit process, while providing insight and transparency into the planning process
- Created dashboards for easy KPI consumption
- Enabled more efficient data entry by department levels and version via Workflow and Processes





About QueBIT

QueBIT enables organizations to achieve a business-focused integration of Financial and Operational Planning and Analysis, extended with Artificial Intelligence (AI) and Machine Learning (ML). This area of expertise is known as Extended Planning and Analysis (xP&A). QueBIT's collaborative, incremental and business-driven approach is driven by over twenty years of experience in delivering successful xP&A solutions to hundreds of mid-market and large companies across all industry sectors and lines of business. For more information on how your organization can **Analyze, Plan and Achieve** your own xP&A journey, please check us out at www.quebit.com.