



Enabling Strategic Workforce Planning with OrgChart Now for a Global Finance Function

Service Area Alignment

- ✓ Consolidating Data for Informed Decision-Making
- ✓ Improving Operational Governance & Visibility
- ✓ Fixing Unstructured or Poorly Documented Processes

Client Overview

The Finance & Accounting (F&A) function of a global business needed to overhaul how they managed **organization structure, manpower planning, and cost visibility**. With workforce data spread across multiple systems and vendors, they lacked a centralized, visual tool to support strategic planning across full-time staff, contractors, and outsourced teams.

The finance leadership—including the CFO, Director of Finance, and senior leadership—required a solution that could consolidate data from tools like Dayforce Ceridian, NetSuite, and vendor systems, enable budgeting vs actual comparisons, and allow **scenario planning for resource and cost optimization**.

Challenges

- **Fragmented Workforce Data** – Employee and contractor information was spread across HR systems, ERP tools, and third-party platforms.
- **No Unified Org Chart or Cost Visibility** – Leadership lacked a centralized view of workforce structure and costs.
- **Inability to Scenario Plan** – During budgeting, there was no way to simulate changes and see cost implications on cash flow and P&L.
- **Visual & Operational Inconsistency** – Org chart visuals and team photos were inconsistently maintained across SharePoint and other sources.

Our Approach & Solution

Step 1: Tool Evaluation & Selection

- Conducted market research to identify the right solution, ultimately selecting OrgChart Now, a SaaS-based workforce planning tool.
- Ensured tool compatibility with Dayforce, NetSuite, and vendor platforms, including support for API-based or manual integrations.

Step 2: Data Consolidation & Process Integration

- Designed processes to collate data from various systems into OrgChart Now—including employees, contractors, and subcontractors.
- Established integrations where possible and manual upload processes where needed.
- Structured the database to enable **budget vs actual headcount and cost comparisons**.



Step 3: Visualization & Scenario Planning Setup

- Created **department-level org chart views with aggregated resource costs**.
- Enabled **scenario planning** to simulate different resourcing models and view their financial impact.
- Designed outputs to suit CFO, Director of Finance, and executive needs—ensuring easy navigation and insights.


Step 4: Strategic Optimization


- Supported leadership in using the tool to conduct **cross-regional workforce planning**.
- Helped identify **supplier overlaps and resource synergies**, leading to improved vendor utilization and cost renegotiation.

Results & Impact

 **Centralized org chart with full workforce visibility**, including internal and outsourced resources.

 **Budget vs actual cost tracking** integrated into visual org structures.

 **Scenario planning capabilities** enabled dynamic decision-making during the annual budgeting cycle.

 Identified **cross-geography synergies** and improved vendor terms through visibility into workforce overlaps.

 **5-star client feedback**, with repeat engagements invited by the CFO's team.

Client Feedback (Implied Impact from Success)

"Rahul helped us unlock true visibility into our workforce—across regions, vendors, and employee types. The planning capabilities he implemented allowed us to optimize supplier usage and confidently project headcount costs during budgeting. Highly recommended!"

Final Takeaways

- ✓ **Consolidated workforce data** empowers finance leaders to plan and optimize better.
 - ✓ **Scenario planning in org design** improves agility during budgeting cycles.
 - ✓ **Strategic tooling + governance** can uncover untapped cost-saving opportunities across global teams.
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About PPS Consulting

PPS Consulting enables structured business scaling through **data integration, process automation, and strategic planning solutions**. We help finance and operations teams drive efficiency, visibility, and growth across global organizations.

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consult@ppsconsulting.biz / www.ppsconsulting.biz