

# Planning for Success

A FTSE 100 global packaging business was seeking to transform the performance of its Financial Planning and Analysis (FP&A) capability. The corporate team had identified the key objectives for the transformation and had clearly identified the current state. However the finance team felt it needed external advice to assist with the development of a visionary end state that would support its objectives and a roadmap to design and implement the required changes to achieve those objectives.

## Challenges

The client faced a number of challenges to developing an end state and roadmap that could be socialised with and accepted by a global and geographically dispersed business. The client team also had limited experience with developing:

- Appropriate workstream structures to achieve the desired objectives
- Messaging for key stakeholders and executives to ensure support and funding for the desired business changes
- Programme and project management systems and processes to support a global change programme
- Governance systems to support the desired end state

## pmX Proposition and Solution

pmX professionals worked with the client's team to develop a change plan that focused on the development of capabilities required to achieve the FP&A strategic objectives. This included:

- Designing workstream structures and resourcing for the project
- Developing a high level pre-implementation roadmap
- Identifying critical success factors and constraints
- Developing detailed stakeholder communications to solicit support and funding

## Impact

The benefits to the client from working with pmX included:

- Successful adoption of the high level roadmap by the finance leadership team
- Key stakeholder support and approval for further funding to move to implementation
- A more effective approach to the development and resourcing of workstreams
- A governance framework to support the transformation, including required programme and project management capabilities

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## Contact the pmX Team

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