

# HOW A LEADING REAL ESTATE DIGITAL MARKETPLACE **STREAMLINED FINANCIAL PLANNING & ENHANCED FORECASTING** THROUGH MODEL INTEGRATION

## QUANTIFIABLE OUTCOMES



**60% of Expenses**

Streamlined in Adaptive Insights



**75% of Operations**

Integrated from Excel



**50 Hours Weekly**

Team Time Savings

### CLIENT NAME

A Leading Real Estate  
Digital Marketplace

### ROLE FILLED

Director / Sr. Director

### EXPERT OPERATOR

Aniv Nayar

### PROJECT OUTCOMES

#### Payroll & Headcount Planning

Streamlined payroll and headcount expense planning in Workday Adaptive Insights, representing 60% of the company's expenses

#### Revenue Model Integration

Integrated eight consumer revenue models from Excel into Workday Adaptive Insights, representing 75% of the company's operations

#### Forecasting Efficiency

Streamlined forecasting, budgeting, and weekly revenue flash updates with automated models

#### Dynamic Functionality

Incorporated assumptions and drivers that were automated by referencing historical trends as baseline assumptions, with flexibility for business input

## ABOUT THE CLIENT

**Industry:** Real Estate and Technology

**Scope:** The client is a major online real estate marketplace that connects home buyers, sellers, and renters with real estate professionals. The company operates a digital platform that aggregates property listings from multiple sources, offering users data-driven insights, valuation tools, and connections to service providers across the real estate ecosystem.

## CLIENT'S CHALLENGES

- The client had an existing, extremely complex payroll model with unclear drivers and logic that made it impossible to conduct variance analysis and confidently update
- The client had multiple, disconnected revenue models that were tedious to manage in Excel and Google Sheets
- These challenges created issues with providing clear and in-depth variance analysis, resulting in reduced capability to provide and identify actionable insights to the business

## PROJECT OBJECTIVES & BUSINESS NEEDS

### Key Project Objectives

1. Document assumptions, build framework, and streamline payroll models to be transparent with clear drivers and assumptions that could be stress-tested and updated
2. Integrate core revenue and operational models from Excel / Google Sheets documents into Workday Adaptive Insights

### Business Needs

- Understand and simplify the planning drivers, assumptions, and process for headcount and payroll models
- Integrate core revenue and operational models into a centralized platform
- Enhance forecasting and budgeting capabilities
- Improve transparency and consistency in financial planning

## SOLUTION IMPLEMENTATION

### Solution Outline

The project involved rebuilding and streamlining the company's payroll and headcount model, based on transparent and clear assumptions and drivers:

1. **Financial Workflow Automation:** Migrated 8 of the 11 core business models from Excel / Google Sheets to Workday Adaptive Insights
2. **Transparent Models:** Built payroll and headcount models with clear drivers and assumptions that could measure and identify past, current, and future business outcomes
3. **Centralized Planning Platform:** Integrated various Excel / Google Sheets based financial models leveraging Workday Adaptive Insights, providing increased automation and accuracy
4. **Business Layer Separation:** Provided a clearer view of the business by separating baseline (BAU) operations from adjustments and layered initiatives

## KEY PROJECT ELEMENTS & DELIVERABLES

**Systems & Tools Used:** NetSuite for ERP, Adaptive Insights for budgeting and forecasting, and Excel for ad hoc financial analysis

**Timeline:** 3 months to implement the solution with 1 consultant

**Data Integration:** Consolidated data from NetSuite, Ultipro/UKG, Excel dashboards, and internal operational systems into Adaptive Insights for holistic budgeting and forecasting

### Key Deliverables

- Streamlined headcount and payroll financial model
- Integrated core business unit financial models into Adaptive Insights
- Centralized, expedited, and improved accuracy for annual budgets and quarterly forecasts
- Enhanced planning framework with clear drivers and assumptions

## OUTCOMES

### Milestones Achieved

- Integrated 75% of core business operations from Excel-based planning models to Workday Adaptive Insights
- Streamlined payroll and headcount expense planning, representing 60% of the company's expenses
- Integrated eight consumer revenue models, representing 75% of the company's operations
- Established automated models with dynamic functionality to adjust based on business input

### Outcome Details

- 1. Time Savings:** After full adoption, the collective team is estimated to save roughly 50 hours/week from automation of migrating the financial models from Excel into Workday Adaptive Insights
- 2. Improved Data Accuracy:** The automation of budgeting and forecasting models provided more accurate historical trends and forecasts
- 3. System Scalability:** Leveraging Workday Adaptive Insights for financial planning allowed the customer to have increased planning capacity by being able to plan more accurately with different dimensions (platform, geography, user type)
- 4. Enhanced Decision Support:** The centralized platform with integrated models provided more actionable insights for business leaders

## KEY BENEFITS & LESSONS LEARNED



### Consistent and Clear Methodologies

By establishing a standardized framework, the client improved cross-functional alignment, enhanced forecast accuracy, and drove more informed decision-making



### Adaptable Frameworks

Rather than forcing every business unit into a one-size-fits-all approach, adaptable methodologies maintained core financial discipline while allowing for necessary adjustments based on each unit's unique drivers



### Cohesive Financial View

Consistency not only streamlined reporting and analysis but also provided leadership with a more cohesive view of the company's overall financial health, facilitating better long-term planning

### Project Summary

The project delivered significant improvements in financial planning and forecasting through model integration and process standardization. By rebuilding the payroll model with clear drivers and migrating core revenue models to Workday Adaptive Insights, the client achieved more transparent financial planning, better forecasting accuracy, and substantial time savings. These improvements enabled the finance team to provide more actionable insights to business leaders and support better strategic decision-making.

## 8020 CASE STUDY




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