

Long Range Planning

Epic: Strategic Planning

User Story Title: Create a New Business Unit

Who? Executive Leadership

What? Establish a plan for a new business unit and the related impact of adding the new business unit

Why? To meet the long-term strategic growth target

How? Manually create any number of net new business units throughout the organization

Description:

As an executive leader, I need the ability to create a new business unit and assess the related impact of adding the new business unit to see if it can help me meet the long-term strategic growth target. To be able to do this easily, I want to be able to copy and mimic the existing forecast and assumptions from an existing business unit to seed the baseline impact of a new business unit. I then want to be able to make adjustments (both in terms of underlying drivers or absolute dollar value) to the forecast.

I will know it's achieved when I can easily add, remove, and change business units in my organization and see the financial impact of creating a new business unit in my organization on my long-term plan.

Complexity Estimate: Medium

Level of Effort Estimate: Medium

Sprint Cycle: Sprint 1

Sprint Points Assigned: TBD

Long Range Planning

Epic: Multi-year Target Setting

User Story Title: Add Yearly Growth Assumptions to Drive the Long-term Forecasts

Who? VP of Finance

What? Enter growth rates and view financial impact

Why? To ensure top-down targets are in place to meet the organization's yearly growth aspirations

How? Enter growth rates, either company-wide, by business unit, or by product

Description:

As a VP of Finance, I need the ability to enter growth rates and view the financial impact, so that I can ensure top-down targets are in place to meet the organization's yearly growth aspirations. I also need to be able to perform what-if scenarios to create various versions of my multi-year forecast (target and allocation of target).

I will know it's achieved when I can enter growth rates at any level of my key hierarchies (e.g. company-wide, by business units, or by product, etc.) and compare different scenarios of our financials side by side to see which is the optimal approach for achieving our aspirations.

Complexity Estimate: Medium

Level of Effort Estimate: Medium

Sprint Cycle: Sprint 2

Sprint Points Assigned: TBD

Long Range Planning

Epic: Reporting

User Story Title: KPI Report

Who? CFO or VP of Finance

What? Review the organization's KPIs and how they will be impacted by various assumptions that have been made as a result of long range planning process

Why? To understand implied impact on productivity and operational efficiency to achieve the long range plan

How? View consolidated report that shows side-by-side comparison of different scenarios and the impact on the same set of KPIs

Description:

As a CFO or VP of Finance, I need to be able to review the organization's key KPIs and how they will be impacted by various assumptions that have been made as a result of long range planning process. With this, I can understand the implied impact on productivity and operational efficiency to achieve the long range plan.

KPIs I want to be able to see are the following:

- YoY revenue growth
- Gross margin
- Customer acquisition cost
- Revenue per headcount
- EPS and P/E
- Expense as a percentage of revenue
- FX risk and economic exposure

I will know it's achieved when I can view a report that shows side-by-side growth, YoY as well as version to version.

Complexity Estimate: Low

Level of Effort Estimate: Medium

Sprint Cycle: Sprint 3

Sprint Points Assigned: TBD