



Agility is key to navigate financial complexities and uncertainty

Protiviti's Business Planning & Analysis Solution for Higher Education

protiviti®
Global Business Consulting

In the face of ongoing uncertainty, volatility, and increasing competition, higher education institutions require greater agility and meaningful data-driven insights for more effective decision-making. Protiviti's Business Planning & Analysis solution equips clients with the necessary tools to navigate complex scenarios, adapt to changes, and achieve desired outcomes.

Disruptive challenges require innovative solutions

The future is difficult to predict, and organizations must be strategic and agile to navigate these challenging environments and financial complexities. Enabling faster and more informed data-driven decisions across higher education institutions is a continuous journey and there is no one-size-fits-all solution. Each organization requires an individualized approach aligned with strategy to optimize performance through the power of robust financial planning and analytics.

Protiviti's BP&A practice offers end-to-end customized solutions to help address the most challenging budgeting, planning and analytics issues, delivering results, including:

- More agile, scalable, and integrated finance functions with deep analytical capabilities and a culture of collaboration across the institution.
- Ability to identify risks and opportunities to initiate and support critical decisions.
- Enhanced management reporting providing greater transparency of variance drivers, spend and investments.
- More accurate budgets and financial projections that leverage meaningful analytical insights enabled by technology.

57%

of finance leaders in private organizations rate financial planning and profitability analysis and reporting as a high priority for the coming year*

64%

of public sector organizations that are employing generative AI** are doing so as part of financial forecasting activities*

*Global Finance Trends Survey | Protiviti US

**Our survey indicates that 34% of finance organizations are currently using generative AI

The next generation of financial planning and budgeting in higher education extends collaboration beyond the budgeting office and incorporates data-driven analytics to generate actionable insights that drive strategic decision-making and institutional agility.

How we help our clients with Business Planning & Analysis in Higher Education

Transformation

Challenge: Inability to produce accurate and timely budgets and financial reporting due to limited analytical capabilities and/or ineffective use of data and technology.

We help **transform your Budget Office function** to achieve:

- More timely and accurate financial reporting and budgets
- Strategic financial risk management through insightful analytics and actionable management reporting
- Enhanced organizational design and capabilities; increased focus on strategic partnerships across the institution
- Optimized use of technology to drive process efficiencies and unlock more impactful analytics

Business Intelligence, Reporting & Analytics

Challenge: Inability to produce insightful financial reporting and analytics, providing visibility of performance drivers and supporting more strategic and profitable decisions.

We empower your organization to make more **timely and informed data-driven decisions** based on:

- Quality and governance of data used for planning, reporting, analytics, and business decision support
- The design, build, and scalability of enhanced analytics solutions, platforms, and visualization tools
- Forward-looking advanced analytics, including AI and Machine Learning, to enable strategic financial risk management

Technology Support

Challenge: Inconsistent and/or suboptimal use of technology, as well as highly manual efforts to support planning and analysis practices.

We help **modernize your underlying technology** strategy and support system implementations to:

- Reduce operating costs and technical debt
- Harmonize the way the Budgeting Office supports departments throughout the institution
- Accelerate automation and innovation to drive scale and efficiencies and unlock agility
- Integrate technology platforms and solutions, aligning technology enhancements with process transformation

BP&A as a Service

Challenge: Lack of consistent delivery due to limited team capacity and/or limited expert capabilities among the Budgeting Office.

We provide **subject matter expertise** and **immediate resource support** to perform:

- Traditional planning and analysis - financial modeling, budgeting, forecasting, working capital planning
- Strategic decision support – including scenario planning, strategic cost optimization
- Routine financial reporting - management reporting, cost allocation modeling, analysis of financial results

Ready to Transform your Organization?

Let's create a tailored strategy for your success.

LEARN MORE

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Protiviti is a global business consulting firm and a wholly owned subsidiary of Robert Half, that delivers deep expertise, objective insights, a tailored approach and unparalleled collaboration to help leaders confidently face the future. Together, Robert Half and Protiviti provide an unmatched range of professional services from consulting and project implementation to managed services and staff augmentation.