



Optimizely

Okorio + Workday Adaptive Planning *Case Study*

OKORIO
AN ACTIVE CYBER COMPANY


workday[®]

sales@okorio.com | www.okorio.com

Optimizely's Digital Transformation with Okorio

Case Study

Optimizely's leading digital experience platform (DXP) enables companies worldwide to manage their content lifecycle, monetize digital experiences, and experiment across customer touchpoints.

Optimizely supports more than 10,000 businesses, including H&M, PayPal, Zoom, Toyota, and Vodafone, in enhancing customer lifetime value, increasing revenue, and growing their brands.



OVERVIEW OF OKORIO AND WORKDAY ADAPTIVE PLANNING

Okorio is a Workday consultancy specializing in HCM, Financials, and Adaptive Planning. Built on Active Cyber's expertise since 2016, Okorio delivers strategic, high-impact Workday solutions—from seamless implementations to ongoing optimization and support.

We help businesses streamline HR, enhance financial management, and drive smarter planning, ensuring they maximize their Workday investment for long-term success.

PROJECT OVERVIEW

Optimizely, a leading digital experience platform provider, empowers marketing and product teams to create and optimize customer experiences across all channels. In late 2021, the company implemented Workday Adaptive Planning to streamline financial processes and went live in early 2022—aiming to support faster, more informed decision-making across the business.

ISSUES FACED

The foundational issues Optimizely encountered:

1

Complex Entity Structure

The initial setup included an overly complicated entity structure, which made overall navigation and data retrieval cumbersome.

2

Inadequate FX Reporting

The system was not optimized for foreign exchange (FX) reporting, limiting Optimizely's ability to manage and report on their global financial operations effectively.

3

Non-functional System

Overall, the system did not meet Optimizely's needs, resulting in a lack of user adoption and reliance on alternative methods.

Optimizely's Digital Transformation with Okorio

Case Study

RESOLUTION OF ISSUES

Okorio transformed Optimizely's Workday Adaptive Planning instance by taking the following key measures:

- **Skilled and Communicative Team:** Okorio kicked off the engagement by bringing in their well-skilled and highly communicative team. They worked closely with Optimizely to understand their specific needs and provided ongoing support and recommendations based on industry best practices.
- **Simplifying the Entity Structure:** Okorio re-built the foundational framework, making the level structure more intuitive and easier to manage, which resulted in streamlined data access and reporting processes.
- **Enhancing FX Reporting:** Okorio implemented best practices and tailored solutions to optimize FX reporting capabilities, ensuring accurate and comprehensive financial reports.

THE SOLUTION

Through these efforts, Okorio transformed Optimizely's Workday Adaptive Planning system from an inefficient and overly complicated tool into a robust and effective component of their financial planning infrastructure.

Optimizely immediately followed their reimplementation with a Managed Services Support agreement, where they are constantly adding new projects to overall functionality of Adaptive.

By leveraging Okorio for a reimplementation followed by Managed Services Support, this not only resolved their previous issues but also empowered Optimizely to undertake more significant and impactful financial projects moving forward, such as rolling out Balance Sheet and Cash Flow Statement planning.

"It has been highly beneficial to have this framework, as we have the flexibility on how to prioritize our projects and can continually work on overall Adaptive functionality and enablement on our end." – **Michelle Williams (Vice President of FP&A)**

Tired of outdated HR processes? Let's fix that!

Reach out to sales@okorio.com to get started with us today.

