

Financial Planning & Performance Assessment

Understanding Planning Capability, Closing Performance Gaps and Building the Foundation for Faster, more Confident Financial Decisions

A structured assessment to help organisations understand how effective their financial planning, budgeting, forecasting and reporting processes truly are — and what must be strengthened before committing to investment, transformation or technology decisions.

When This Assessment is Most Relevant

This assessment is designed for organisations that are:



Running budgeting and forecasting cycles that take too long, consume too much resource and produce results that are unreliable or already out of date



Bridging gaps between systems with spreadsheets — creating version control issues, error risk and limited auditability



Unable to get a single, trusted view of actuals, forecasts and variances without significant manual effort



Seeking an objective view of planning capability before committing to a platform selection or implementation programme

The Questions This Assessment Answers

- How mature and effective is our financial planning and performance management capability — really?
- Where are the biggest process, data and governance gaps today?
- What is preventing our reporting from being faster, more trusted and more actionable?
- What must be addressed first to reduce risk and accelerate value from any future investment?
- What is the most realistic, sequenced path to better financial performance?

What We Assess

- Budgeting, forecasting and planning cycle efficiency, accuracy and consistency
- Financial close and consolidation speed, data quality and integrity of reported numbers
- Management reporting timeliness, variance analysis and self-service capability
- Volume of manual workarounds, integration gaps and governance of financial data

How the Assessment Works

Facilitated working sessions with Finance, FP&A and business stakeholders, benchmarked against industry experience and AI-enabled analysis.

Hitachi Digital Services brings practitioner-led finance transformation expertise across industries and geographies from mid-market to global enterprise.

Practical, time-boxed and technology-agnostic — run at any stage, whether or not a platform decision has been made.

Key Outputs

- 01** Executive summary of planning capability, gaps and risk areas
- 02** Maturity heatmap and prioritised gap analysis across planning, consolidation, reporting and governance
- 03** Early, high-impact improvement actions (30–90 days)
- 04** Recommendations to strengthen foundations before platform selection or implementation
- 05** A sequenced roadmap toward faster, more reliable financial performance management



Why Organisations Start Here

Finance transformation fails on capability gaps, not technology choices, slow budgets, unreliable consolidations, reporting nobody trusts. Assess first, invest with confidence. This assessment creates the clarity needed to move forward with confidence — **before** those gaps become costly problems.

Next Step

A short, no-obligation conversation to understand your organisation's context and confirm whether this assessment is the right starting point.

Register interest via the [Financial Planning & Performance Foundations landing page](#)