

CASE STUDY

Why business planning predicts partner success

Study by

Deloitte.

qellabi

Introduction

Effective planning is critical to the success of any organization.

It enables companies to set achievable goals, prioritize resources, and monitor progress toward achieving objectives. This case study examines the impact of planning on the bottom line and highlights the importance of having a process in place to ensure plan execution.

Summary

The results of the analysis showed that **plan creation and plan execution have a positive impact on the bottom line.**

Organizations that made a plan and executed it saw an improvement in their bottom line compared to those that did not make a plan or did not execute their plan. Effective planning can help companies achieve their objectives more efficiently and with fewer resources, resulting in cost savings and increased profitability.

Methodology:

Deloitte, a Qollabi partner, conducted an analysis on a Qollabi customer data set to answer two questions:

1. What's the difference between making a plan and not making a plan?
2. What's the difference between executing that plan and not executing that plan?

The analysis aimed to measure the impact of plan creation and plan execution on the bottom line.

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AN ANALOGY

The importance of planning

To better understand what successful plan creation and execution looks like, consider the following analogy.

Do you make a list when you go to the grocery store?

Most people know that when you have a list, you can follow up on it. Not only do you **improve** the chances of getting everything you need, but making a list frees up “head space” to think about **other things** like preparing a delicious dessert for dinner or a nice Sunday brunch for you and your loved ones.



Do you check your shopping list while you're at the store?

If you want to successfully execute your trip to the grocery store, you check off items on your list as you put them in your shopping cart. If you forget to use the list, you may forget one or more essential items.



Do you involve your partner in the process?

For some people, this question may not be funny. Let's say you go to the store and don't tell your spouse or partner beforehand.

Not including your partner in the process, could potentially get you in trouble, right? Not communicating well can often result in an argument when you get home without the items the other person wants or needs.

In other words, problems can arise because you weren't **aligned** with each other's **goals and needs**. A more effective, aligned, and harmonious approach would be to engage in what's called "mutual shopping."



02

What is the impact of plan creation?

Shifting back to the business world. Renowned management consulting company Deloitte recently conducted a study on the correlation between plan creation and target achievement.

The goal of the study was to see if better planning can lead to a significant boost in productivity and revenue.

In the study, Deloitte analyzed **>400 partner plans** in Qollabi and found a significant correlation between **plan creation and target achievement**.

The two concepts plan creation and plan execution are explained in the following visual.

Plan Creation %

Explore the relationship between plan creation and Target Achievement (%).

"Creation of a plan" is defined as creating a reporting period for that week and updating **at least one activity**.



Plan Completion %

Explore the relationship between plan completion and Target Achievement (%).

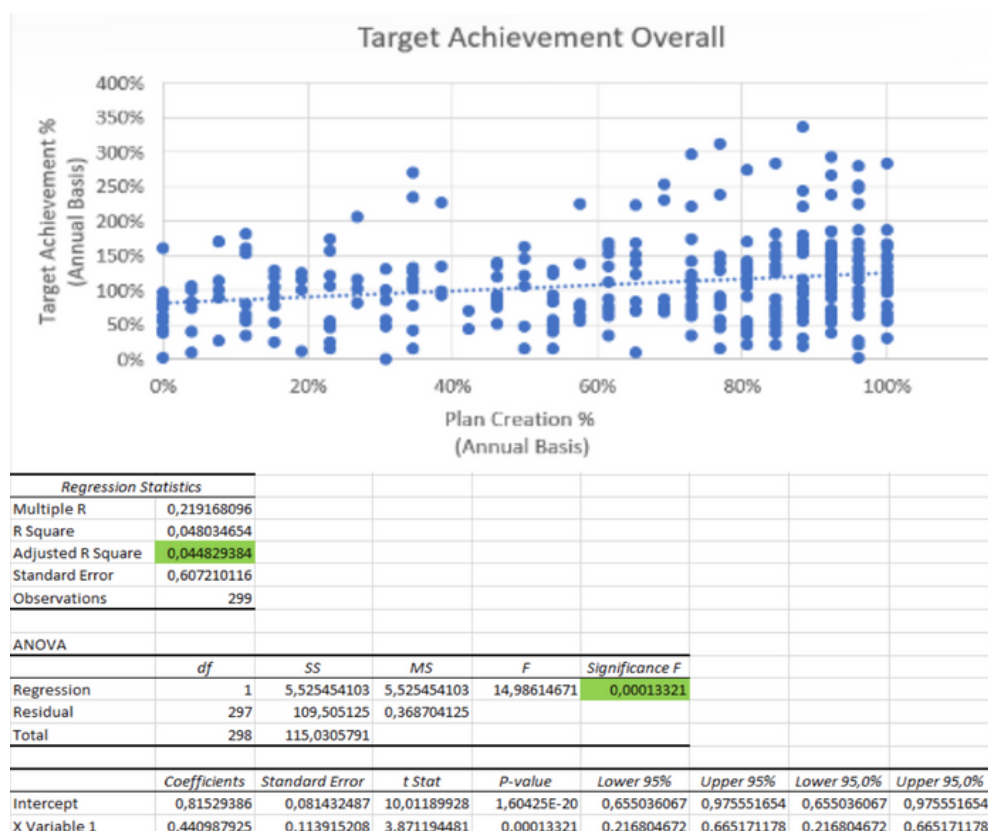
"Completeness of a plan" is defined as a ratio between the **number of activities** that are **manually updated** during the weekly reporting period and the total number of activities.

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According to Deloitte's analysis, the partner manager had to set an objective for each reporting period to **attain** a **100%** plan creation score.

The results showed that those who **achieved** this had a **120%** plan target achievement, while those who did not set any objectives during the analysis only **achieved 80%** of their target.

0% of plan creation leads to an average of **80%** of target achieved
100% of plan creation leads to an average of **120%** of target achieved



Study by Deloitte

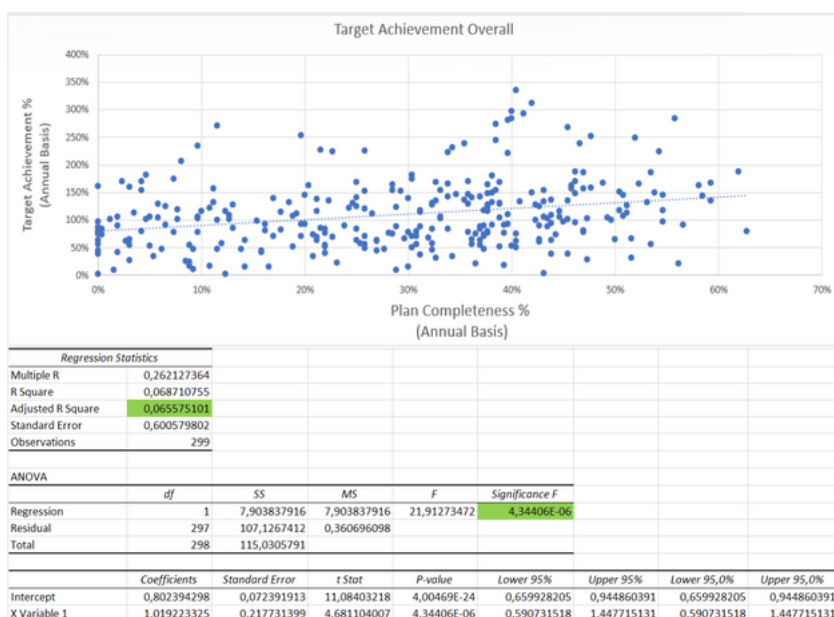
03

What is the impact of plan execution?

In addition to plan creation, Deloitte investigated the significance of plan execution. The study defined plan execution as the number of activities updated by the partner manager during the reporting period. For example, if the manager set **10 activity objectives** at the beginning of the period and updated **6** of them, the plan **execution rate** would be **60%**.

The findings revealed that if the partner manager executed **0%** of the plan, they would only attain **75%** of their target. However, if they executed **60%** of the plan, they would achieve **135%** of the target.

0% of plan completion leads to an average of **75%** of target achieved
60% of plan completion leads to an average of **135%** of target achieved



Study by Deloitte

A plan is useless but planning is essential

This case study demonstrates the importance of **effective planning** and the impact it can have on the bottom line.

Companies that invest in planning and execution processes can achieve their objectives **more efficiently** and with fewer resources, resulting in **cost savings** and **increased profitability**.

To stay competitive in today's fast-paced business environment, companies must adopt **dynamic planning processes** that enable them to adjust quickly to changing market conditions.

As D. Eisenhower once famously said: "**A plan is useless, but planning is essential**".

A SHORT SUMMARY

- Plan creation vs no creation leads to a 40% increase in target achievement
- 60% in plan execution vs 0% in plan execution leads to a 60% increase in target achievement.