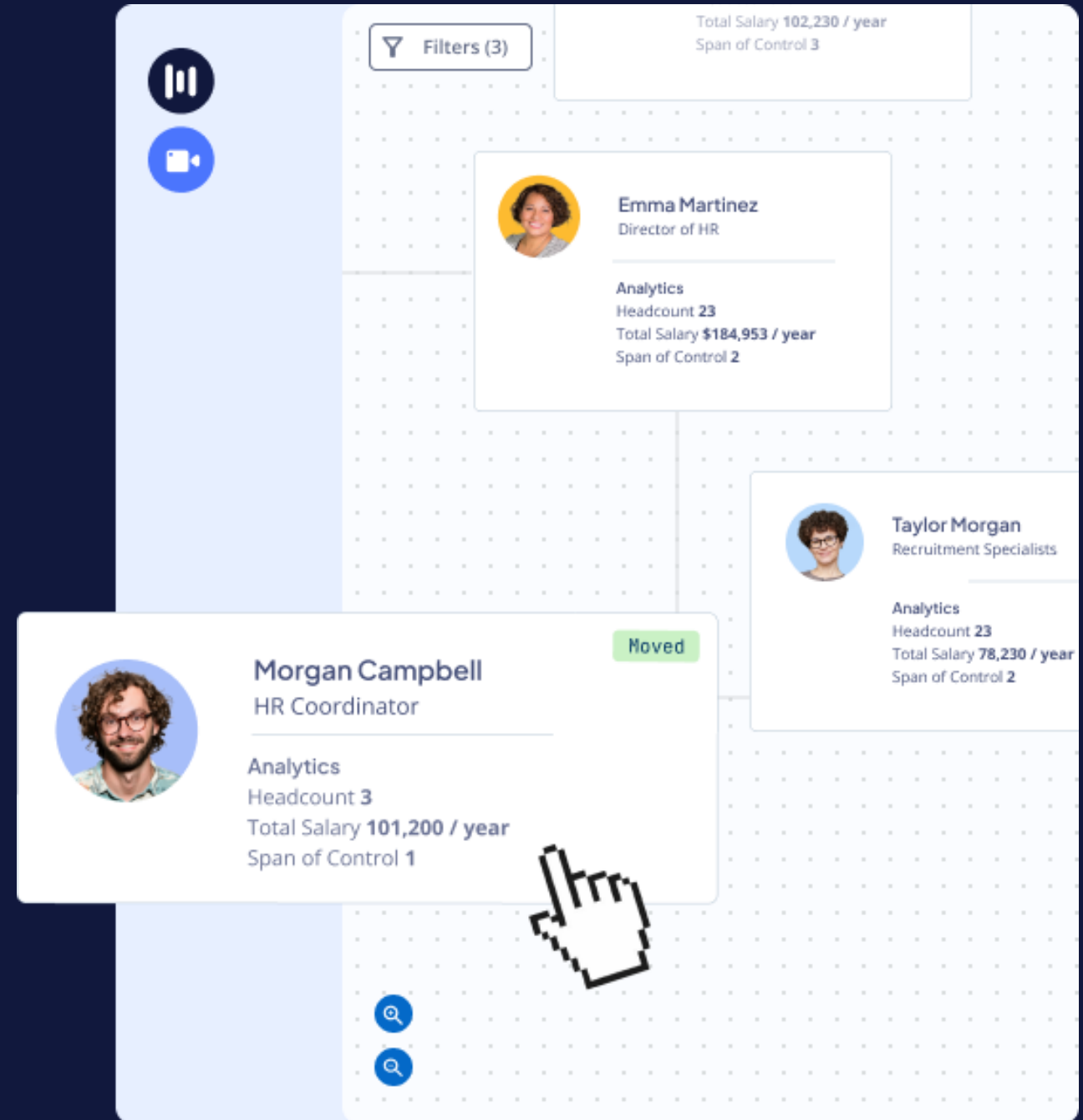


October 1, 2024

Nakisa X ODF Tech Talk

Driving dynamic org design with next-gen tools



Agenda



Who is Nakisa? | **p4**

What does next-gen organization design software look like? | **p8**

Org design case/software demo | **p14**

Benefits of using an org design solution | **p21**

Q&A | **p24**

Learning objectives

We hope **you gain** the following from this session:

1. Better understanding of how tech can supercharge your OD/WFP initiatives
2. Augmented business case

Meet your speakers



Philip Hofton

Director, Business
Development & Strategy



Sebastiaan Bos

Director, HR Product



Driving dynamic org design with next-gen tools

01

Who is
Nakisa?

About us

Fortune 1000's software choice for solving complex finance, real estate, and HR use cases

- ✓ A [product-led company](#), founded by [Babak Varjavandi](#), Nakisa's current CEO
- ✓ Builds innovative SaaS solutions for large enterprises, leveraging a solid cloud-native architecture
- ✓ Offers native bidirectional integration with enterprise ERPs incl. SAP, Workday, and Oracle Financial cloud
- ✓ Ensures security and privacy for large enterprise data: GDPR, ITGC, SOC I Type 2 & SOC II Type 2, FIPS 140-2 compliant
- ✓ Nakisa grows through building innovative solutions and the acquisition of complementary products



200+
Large Enterprise Clients



300+
Staff in 4 offices



3 Lines of Business
RE, HR, and Finance



20+
Years of Domain Expertise

[Learn more about Nakisa at nakisa.com](https://www.nakisa.com)

Our product portfolios

Three lines of business: Real estate, finance, and HR

NAKISA
WF Planning Product Portfolio

Organization design and
workforce planning for large
enterprises

NAKISA
IWMS Product Portfolio

IWMS for large enterprises

NAKISA
Accounting Product Portfolio

Cloud-native accounting for
global large enterprises

NAKISA
HR Core

NAKISA
Finance Core

NAKISA
Open Cloud Platform

The **trusted platform partner** of our clients, their IT and developers.

Our client snapshot

Global deployments at Fortune 1000 companies in multiple industries

Retail and F&B



Transportation and Telco



Oil, Gas, and Energy



Pharma and Health



Banking and Financial Services



Other



Driving dynamic org design with next-gen tools

02

What does next-gen organization design software look like?

Org design/WFP solution supporting processes

Achieving organizational design & strategic workforce planning objectives

Any workforce planning and organizational design solution *must* have the following integrated capabilities:

- Access to baseline data
- Easy-to-use data analysis tools
- Support for scenario planning and 'what-if' analysis
- Seamless integration into strategic planning
- Scenario structuring based on various themes such as jobs, positions, talent, and teams
- Collaboration features for stakeholder engagement
- Structured, flexible governance and workflow management



Workforce planning – A spectrum of solutions

Workforce planning can involve anything from **managing schedules, capacity, daily activities** to **strategic long-term planning**. These processes help organizations have the **right skills** and **capacity** to achieve its **goal** and **mission**.

Nakisa org design and workforce planning focus areas

Workforce optimization:

Optimize assignment and distribution of tasks to improve business outcomes

Workforce scheduling optimization:

Optimize workers schedule to ensure fairness

Nakisa org design and workforce planning solutions

Operational workforce planning:

Plan for right number and types of workforce resources to meet projected business targets

Org modeling & transformation mgmt:

Align resources with new organizational structures after significant transformations

Strategic workforce planning:

Ensure workforce skills and resources align with short- and long-term strategies

◀ Focus on tactical activity

Operational

Focus on strategic investment ▶

Source: Workforce Planning - how to use technology to support planning process by Helen Poitevin, Gartner, 2020

Nakisa Workforce Planning Portfolio

Operational workforce planning + Modeling and transformation management + **Strategic** workforce planning

NAKISA® Org Chart Suite

- Org Chart
- Agile Org Chart
- Compliance Reporting

NAKISA® Org Design Suite

- Strategic Org Design
- Operational Org Design

NAKISA® Strategic Workforce Planning Suite

- Headcount Planning
- Skill Gap Analysis

NAKISA® HR Core


Organization Structure Data
(Legal Entity, Business Units, Cost Centers, Orgs)


HR Master Data and Financial Master Data
(Jobs, Positions, Employees, Skills, Capabilities)
(Budgets, Compensations, Costs)


NAKISA® Open Cloud Platform


- API Services
- Event Services
- SSO/Security & Compliance
- Analytics Micro-Frontends
- ERP Integrations
- Third-Party Integrations


Who uses organization design and workforce planning tools?

	Oscar Organization Design Center of Excellence	Primary product suites: <ul style="list-style-type: none"> Nakisa Org Chart Suite Nakisa Org Design Suite (Strategic) Nakisa Strategic Workforce Planning Suite


	Hilda HR General	Primary product suites: <ul style="list-style-type: none"> Nakisa Org Chart Suite Nakisa Org Design Suite Nakisa Headcount Planning Suite
	User persona also applies to: <ul style="list-style-type: none"> HR Business Partner (HRBP) HR Shared Service Center (HR SSC) HR Generalist 	


	Annabelle The HRIS Analyst	Primary product suites: <ul style="list-style-type: none"> Nakisa Org Chart Suite
	User persona also applies to: <ul style="list-style-type: none"> HRIS Integration Specialist 	

	Patricia The People Manager	Primary product suites: <ul style="list-style-type: none"> Nakisa Org Chart Suite Nakisa Org Design Suite (Operational) Nakisa Strategic Workforce Planning Suite
	User persona applies to anyone who manages a team of subordinates.	

	Evan The Employee	Primary product suites: <ul style="list-style-type: none"> Nakisa Org Chart Suite
	User persona applies to anyone who works in an organization.	

	Carla The Executive	Primary product: <ul style="list-style-type: none"> All WF Planning product portfolio All IWMS product portfolio All Accounting product portfolio
	User persona also applies to: <ul style="list-style-type: none"> HR, Finance, Real Estate, Facilities, and IT leader Treasurer, Controller 	

	Simon The System Administrator	Primary product: <ul style="list-style-type: none"> All WF Planning product portfolio All IWMS product portfolio All Accounting product portfolio All Nakisa Open Cloud Platform
	User persona also applies to: <ul style="list-style-type: none"> IT Administrator HRIS, IWMS, or ERP Product Owner 	

	Dylan The Developer	Primary products: <ul style="list-style-type: none"> All WF Planning product portfolio All IWMS product portfolio All Accounting product portfolio All Nakisa Open Cloud Platform

Note: These are **end-user** personas. They should not be conflated or confused with buyer personas.

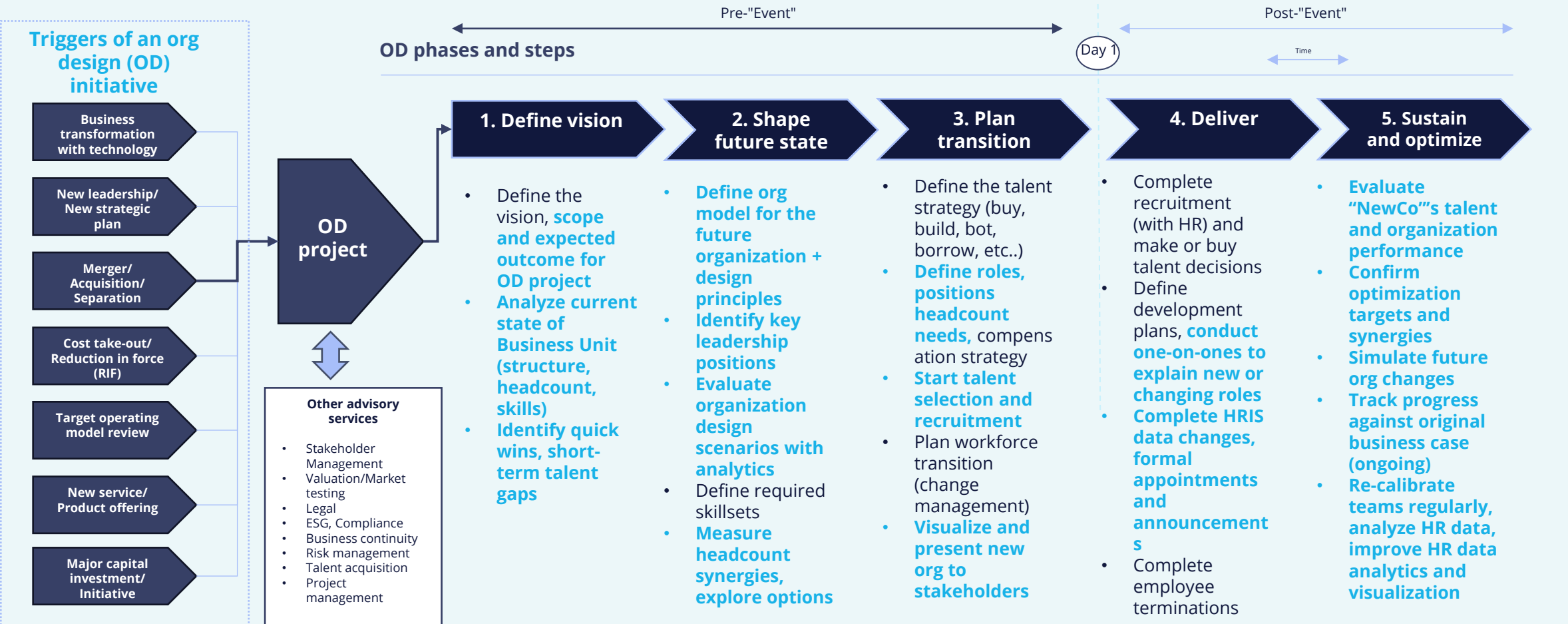
Driving dynamic org design with next-gen tools

03

Demo!

Organization design augmented by tech

Tech greatly facilitates and accelerates key steps in organization integration process during acquisitions



Main use cases for org design software



Cloud Native SaaS

Organization visualization



Org charts

- Simplify visualization of large data structures
- Multiple display options/Summary views
- Real-time decision support
- Provide timely, informative insights
- Gain holistic overview

Organization design



Operational Org Design

- Empower managers to manage team structure
- Foster collaboration
- Simulate organizational changes
- Streamline change approval and execution

Strategic Org Design

- Follow structured process and delegation of responsibility for building future organization
- Foster collaboration and document changes
- Help with organizational restructuring, reduction in force, M&A, organizational efficiency
- Understand impact of changes through analytics and dashboards

Strategic workforce planning



Headcount Planning

- Launch and manage headcount planning process
- Empower management team with bottom-up planning
- Consolidate in final headcount plan
- Analytics & reports to show plan results

Nakisa org design solution demo

● Live Demo



NAKISA® Strategic Workforce Planning Suite

- Headcount Planning

Carla manages headcount planning process:

- Reviews global plan
- Delegates sub-plan to Patricia

1

Patricia creates her HC Plan:

- Adds/removes headcount based on needs
- Collaborates with HR
- Submits plan for approval once she receives feedback from Hilda

3

Hilda reviews the plan

- Hilda reviews plan
- Hilda provides feedback

4

NAKISA® Org Chart Suite

- Org Chart

Patricia reviews her current organization:

- Understands current structure and key metrics

2

NAKISA® Org Design Suite

- Strategic Org Design
- Operational Org Design

Patricia creates her future organization:

- Creates positions (new HC)
- Adjusts current workforce
- Collaborates with Hilda to make changes

5

Real-time organization visualization



- Simplified visualization of large data structures
- Multiple display options and summary views
- Real-time decision support
- Holistic overview and informative insights

Position Reporting Structure

Org Chart Options

- Standard
- Position fields
 - Expand employee names
 - Portrait
 - Employee ID
 - Business Unit
 - City
 - Country
 - Region
 - Cost Center
 - Controlling Area
 - Division
 - Department
 - Department ID
 - Employee Group
 - Employee SubGroup
 - Job
 - Job Code
 - Legal Entity
 - Personnel Area
 - Personnel SubArea
 - Group & Level
 - Linguistic Profile
 - City

Position Directory

Display Name	Department ID	Position Name	Department	Job	Job Code	Vacant
Johanne Dorchester	CO	Analyst	Corp Services	Configuration Analyst	50054567	No
Ruth Awalt	CO	Analyst	Corp Services	Configuration Analyst	50054567	No
Saeika Arayakul	CO	Analyst	Corp Services	Configuration Analyst	50054567	No
Sanna Gibson	CO	Business Analyst	Corp Services	Configuration Analyst	50054567	No
Janetta McCreery	CO	Business Analyst	Corp Services	Configuration Analyst	50054567	No
Alexandra Kinsman	CO	Business Analyst	Corp Services	Configuration Analyst	50054567	No
Salma Sund	CO	Business Analyst	Corp Services	Configuration Analyst	50054567	No
Robin Cordie	CO	Business Analyst	Corp Services	Configuration Analyst	50054567	No
Carrick Kintz	CO	Business Analyst	Corp Services	Configuration Analyst	50054567	No
Erwin Carr	CO	Business Analyst	Corp Services	Configuration Analyst	50054567	No
Ilya Vaskiko	CO	Business Analyst	Corp Services	Configuration Analyst	50054567	No
Sonya Carolina	CO	Project Manager	Corp Services	Specialist	50054572	No

Summary View: CEO Marc Johnson (70819)

Position	Headcount	Span of Control
CEO	1477	9
Director, Corporate Services	70358	77
VP, Finance	71557	185
Director, Manufacturing	72299	292
Sr. Manager, CSO	71326	149
PR Sr. Manager	71049	15
SVP, Global Human Resources	70904	229
VP Legal	71329	24
VP, Information Technology	72368	267
Sr. VP, R&D		
Sr VP, Sales		

Average Salary: \$38,258.89

Total Managers: 113

Headcount by Functional Area

Functional Area	Headcount
Information Technology	~267
Marketing	~15
Corp Human Resources	~15
HR	~15
Engineering	~15
Manufacturing	~292
Production	~15
Administration	~15
Finance	~15
Sales	~15
Research and Development	~15

Management Count By Functional Area

Functional Area	Management Count
Finance	~20
Engineering	~15
Marketing	~10
Production	~5
Information Technology	~5

Top-down and bottom-up org design

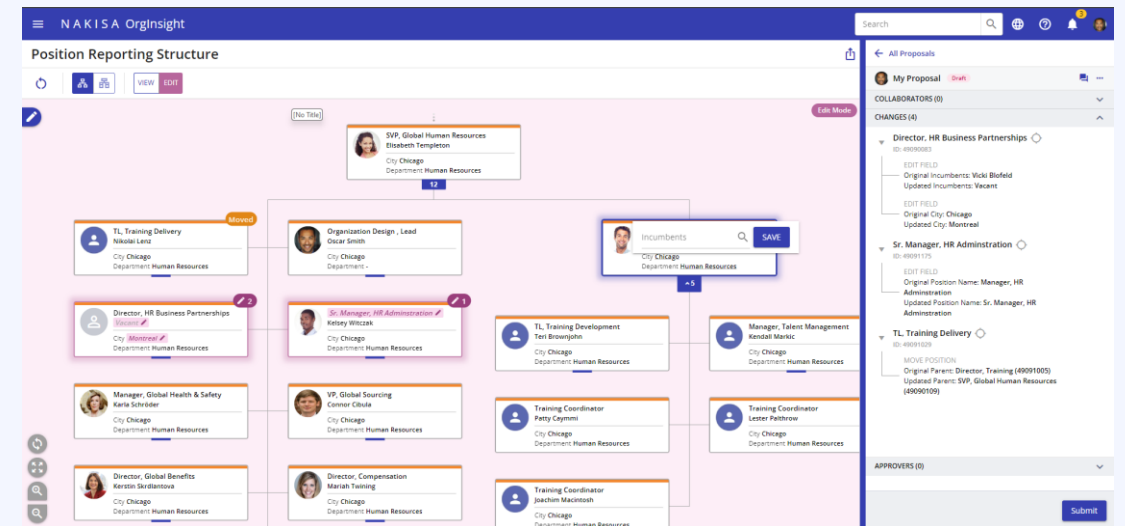
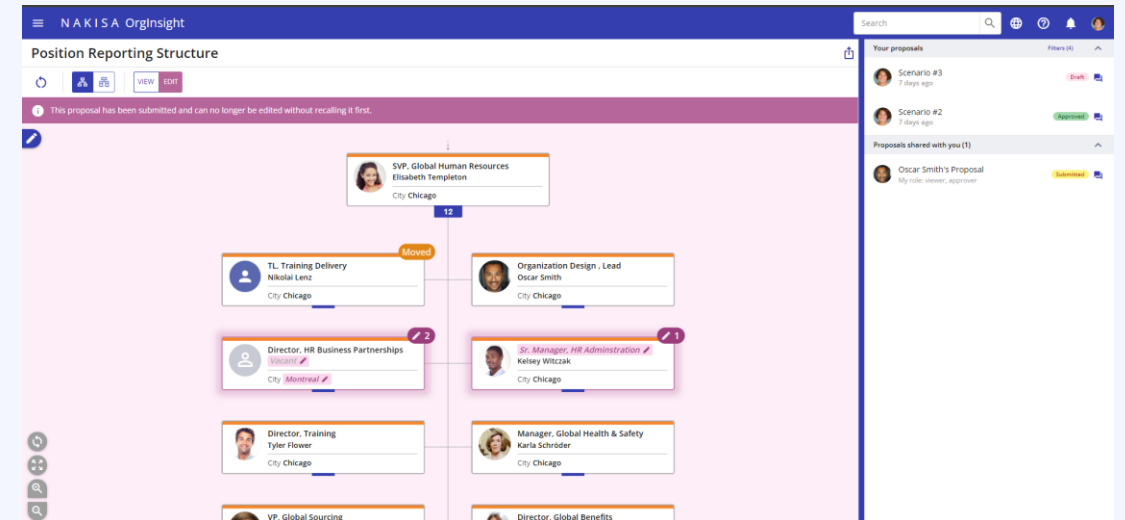


Operational org design

- Empower managers to manage team structure
- Foster collaboration
- Simulate organizational changes
- Streamline approval and execution of org changes

Strategic org design

- Organizational restructuring, reduction in force, M&A, organizational efficiency.



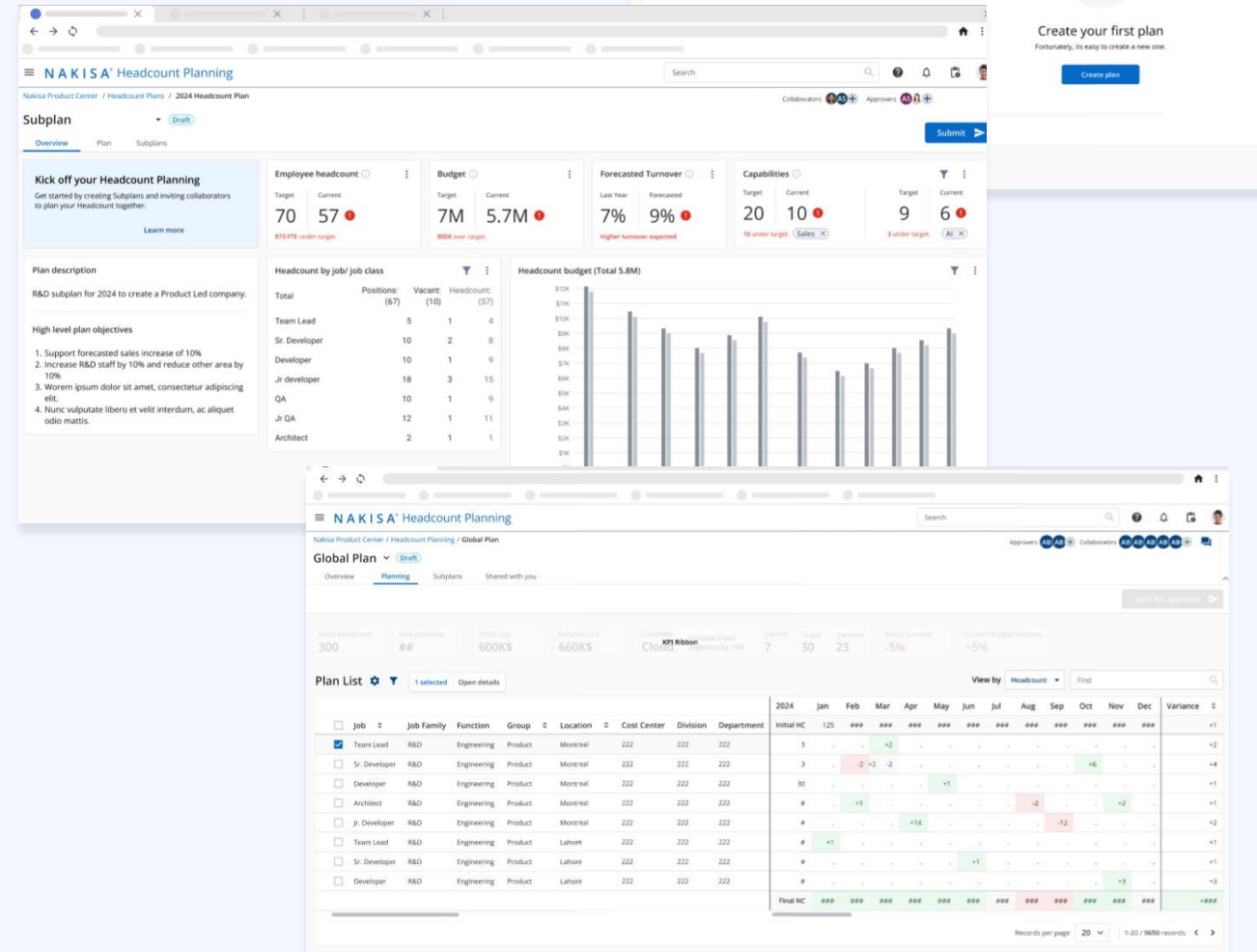
Strategic workforce planning

Headcount planning / Modelling

- Budgeting and financial planning
- Workforce expansion or reduction

Skills gap analysis

- Workforce capability assessment
- Forecast future skill needs
- Identify skill gaps



Driving dynamic org design with next-gen tools

04

Benefits of using
an org design
solution

Who needs next-gen org design tools?

User personas

Employee

Executive ●

HR General ●

HRIS Analyst

People Manager ●

System Administrator



Meet your users



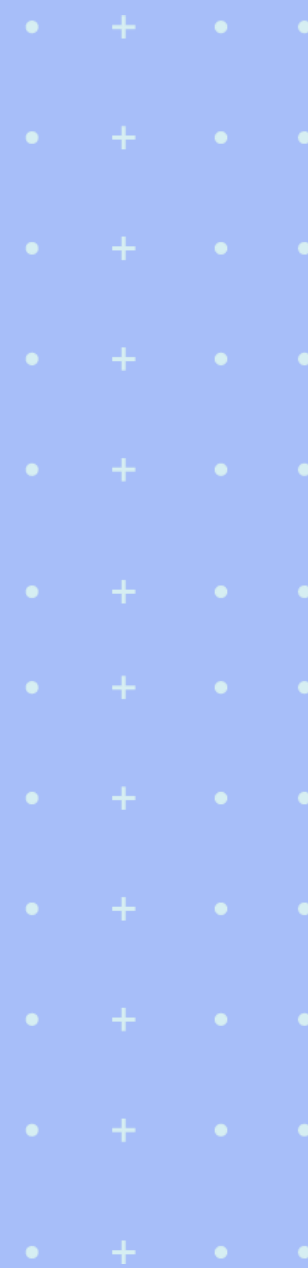
Carla
Executive



Patricia
People Manager

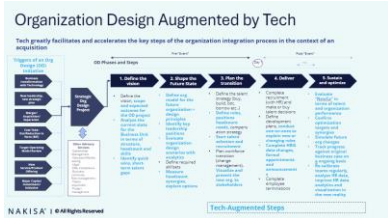


Hilda
HR

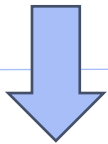


Establishing ROI of tech-assisted org design

What are the business benefits? How do you make the case?



OD project
Short-term
CAPEX



Benefits for
business
Long-term
OPEX

Tangible benefits

- Quicker/better/faster more agile project management
- Reduced reliance on and \$ for external OD expertise
- Fewer FTEs crunching data/less manual work by humans
- Quicker achievement of synergies/talent optimization targets
- Reduced business risks on HR data governance, privacy regulations, and cybersecurity
- More demonstrable ROI of the HRIS systems landscape

Intangible benefits

- Better stakeholder engagement across HR, Finance and the business
- Quicker decision making for all
- Increased transparency and credibility of the project, for steercos, exec committees, boards
- More efficient permanent OD/HR processes
- Better employee experience for users/HR practitioners/Leaders
- Better dialogue with Finance dept on ROI for talent/OD projects

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Q&A

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