



BOHLER //

From Day-Long Forecast Updates to Real-Time Planning



Overview

Bohler is a nationally recognized land development, consulting and site design firm that helps developers, owners and other real estate professionals' identify and act on opportunities across the United States. Read on to find out how Bohler transformed their financial planning process by implementing Workday Adaptive Planning with Okorio, moving from manual Excel-based forecasting to a real-time, driver-based planning environment that saves days of work each month.

I went from doing everything in excel with clunky formulas. It was difficult to quickly adjust assumptions. This is going to save us multiple days a month.

The Challenge

Bohler had outgrown Excel. Like many growing professional services firms across architecture, engineering and construction industries, their finance team was trapped in a cycle of manual updates, version control headaches, and forecasts that were outdated the moment they were finished.

The reality they faced every month:

Forecast updates consumed an entire day of work	Running what-if scenarios meant rebuilding spreadsheets
No clear visibility into the workforce metrics that drove revenue: bill rates, utilization, capacity constraints	Formulas broke. Versions multiplied. Strategic analysis took a back seat to spreadsheet maintenance.

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The Transformation

Bohler deployed Workday Adaptive Planning with Okorio as their implementation partner. The results were immediate and measurable.

What Changed

- ✓ **From 8 hours to minutes:** Forecast updates that took a full day now take a simple data refresh and assumption check
- ✓ **Real-time visibility into revenue drivers:** employee-level expected monthly revenue, bill rates, utilization assumptions, vacation impacts, and office-based performance
- ✓ **Scenario analysis became routine** not a special project
- ✓ **The finance team gained full ownership of their planning environment:** reviewing formulas, monitoring data connections, and refreshing forecasts independently

It's so quick to update everything every single month. Now it takes a refresh and checking assumptions and it's good to go."

What Made It Work

Beyond the technology itself, Bohler credits three critical success factors:

True Ownership from Day One

The implementation wasn't just about configuration. It was about enablement. Through weekly working sessions, the Bohler team learned to confidently manage their own system. They're not dependent on outside support for routine updates or formula changes.

Investing in Training Early

Bohler leveraged Workday's on-demand training resources from the start, accelerating adoption and reducing the learning curve. The result: a team that can extend functionality and adapt the platform as business needs evolve.

Partnering for Long-Term Success

Rather than replicating Excel in the cloud, Okorio closely collaborated with the Bohler team through weekly working sessions to design a scalable, best-practice solution, ensuring they could confidently own the platform long-term.

I love that I can have the income statement pulled up and have comparisons of different scenarios all lined up. I love Adaptive...it's wonderful.

Conclusion

Today, Adaptive Planning isn't just a tool. Thanks to Okorio's enablement-focused approach and 10+ years in the Adaptive ecosystem, it's a sustainable, long-term planning solution built on experience, not experimentation. The result wasn't just a successful deployment—it was a foundation that gives Bohler's FP&A team greater agility, deeper insight, stronger control over their planning process, and the independence to evolve the system as their business grows.

Okorio is redefining Workday consulting and services by acting as your performance partner, not just an implementer or traditional AMS. Our advantage is our team of passionate senior experts and former Workday professionals who deliver real outcomes across HCM & Financials, Adaptive Planning, AI & Analytics, and AMS. We design practical solutions grounded in operational reality that empower your team to become truly self-sufficient. By embedding intelligence into every engagement, we turn Workday into a decision-making engine, connecting its data to your broader business story. We don't finish and disappear. We build momentum, independence, and long-term success.

Learn More at
okorio.com | info@okorio.com

