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POSSIBLE (RE)DEFINED

Where does your Company's FP&A Maturity Stand going into 2024?

Elevate Your Financial Planning & Analysis: The Path to Success

Certified B Corporation

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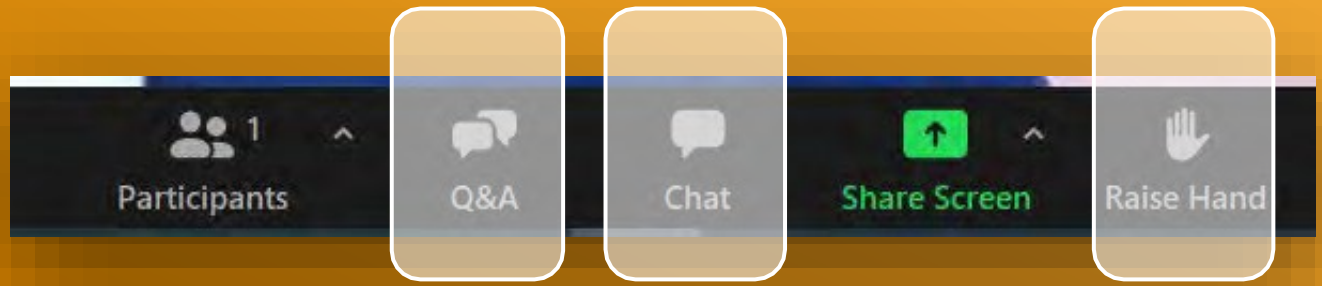
QUICK TIPS

Zoom Webinars



Ask Questions in Q&A Box

- Click the Q&A button to open the window
- Type your response in the text field
- Click Send

Chat

- Click the Chat button to open the chat panel
- Type your message in the Text box at the bottom of the panel
- Press Enter to send your message

Raise Your Hand

- Click the Raise Hand button at any time to indicate to the host know that you have a question or need assistance
- To lower your hand, click the Lower Hand button

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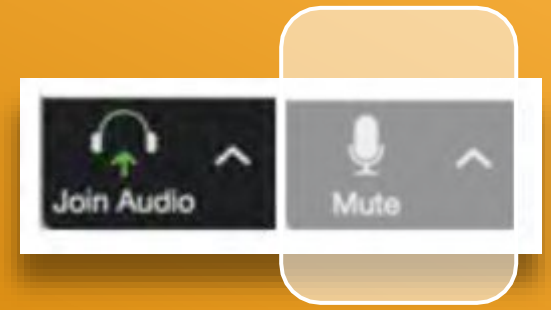
QUICK TIPS

Adjust Audio Speakers

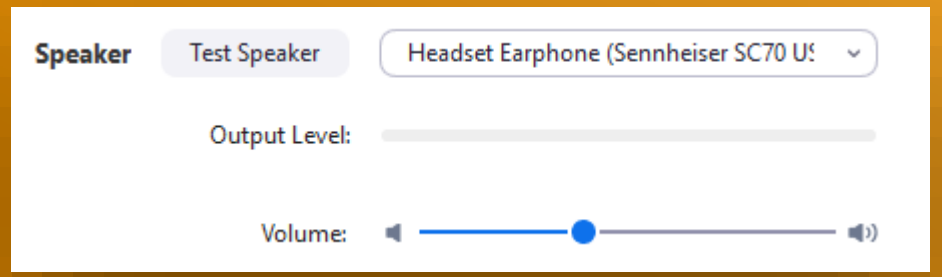


Mute | Unmute

- In the meeting controls, click the arrow next to Mute | Unmute in lower left corner

Audio Options

- Click Audio Options - this will open your audio settings
- Click Test Speaker to play a test tone
- If you cannot hear it, select a different speaker from the menu
- Try adjusting the Volume



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WHAT WE'LL DISCUSS

Today's Agenda

- Learning Objectives & Introductions
- Overview of FP&A Maturity Curve
- Solution Architecture and Functionality Overview
- Presentation of an FP&A Solution
- Closing and Q&A

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WEBINAR OVERVIEW

Learning Objectives

- Identify where your business is on the FP&A Maturity Ranking
- Review the importance of robust financial reporting, dashboarding and planning
- Determine how you can use data and analytics to improve your financial forecasting

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WELCOME

Today's Presenters

Mike Bergines

Senior Director,
Armanino Advisory LLC

Todd Bowlsby

Senior Manager,
Armanino
Advisory LLC

Mark Bennett

Senior Partner
Development Manager

Solver

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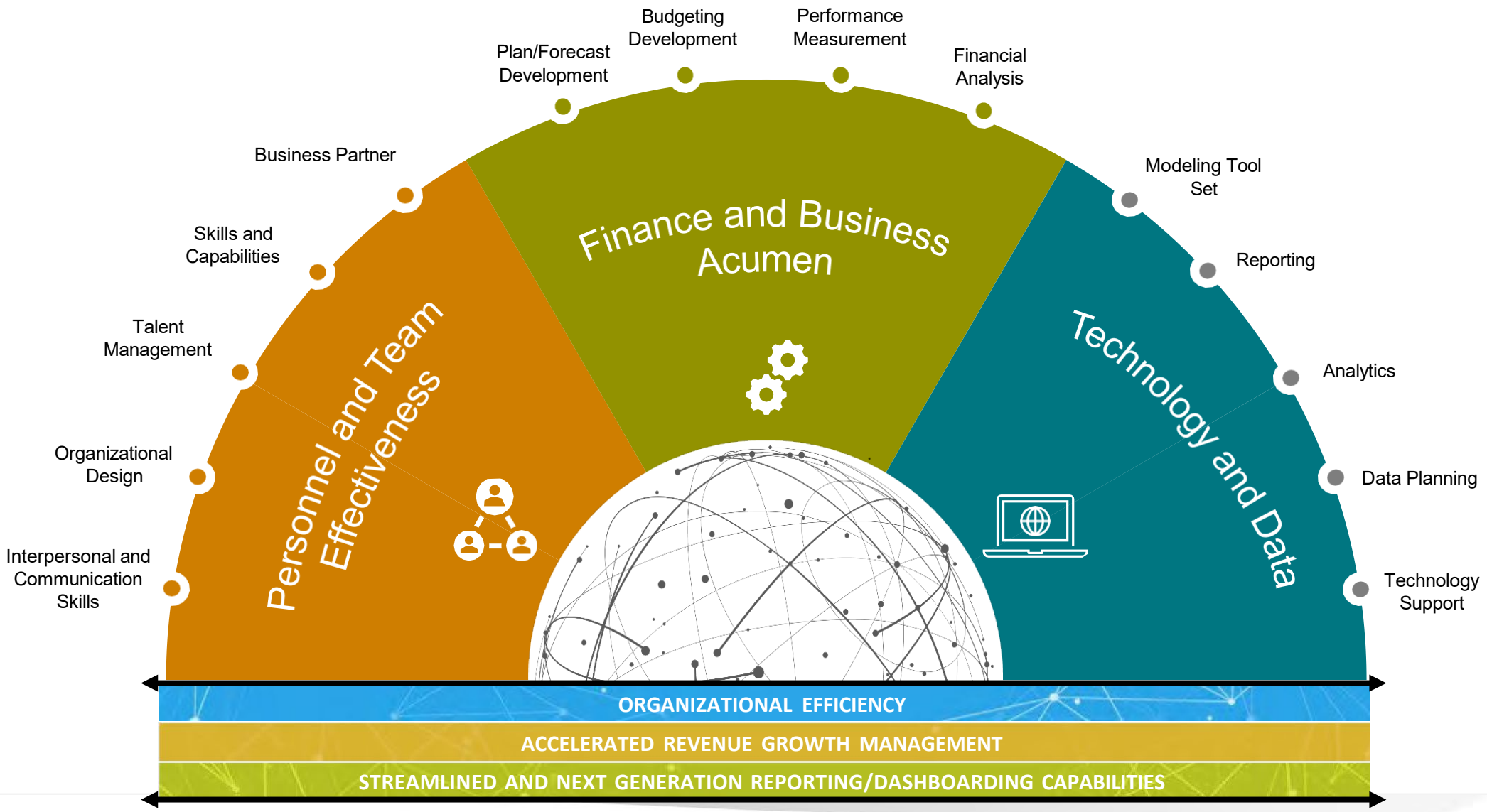
Armanino FP&A Strategy



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FP&A Maturity Self Ranking – Tech & Data

What is your maturity? What do you want it to be? What does in need to be?

	ACTIVITIES/TOOLS	FOUNDATIONAL →	EMERGENT →	LEADING PRACTICES
Technology and Data	Modeling Tool Set	Model is on an island, out of the flow of company data	Standardized planning platforms, widely distributed but Finance controlled	Networked and connected
	Reporting	Manual - time consuming to create	Repeatable – less time creating, more time analyzing	Automated and online – easy to generate accessible for functional managers
	Analytics	Descriptive analytics – what is happening?	Diagnostic analytics – why is it happening?	Predictive and prescriptive analysis – what will happen next?
	Data Management	Siloed, with duplicative data and no definitive “Source of Truth”	Data that creates confidence – shared across systems	Universal data source that addresses multiple, holistic corporate needs

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FP&A

Technology & Data

Why is it so important?

Financial Planning & Analysis (FP&A) is about making investment decisions in a business

- “the art of allocating capital”

Making decisions with data is infinitely better than making decisions with intuition

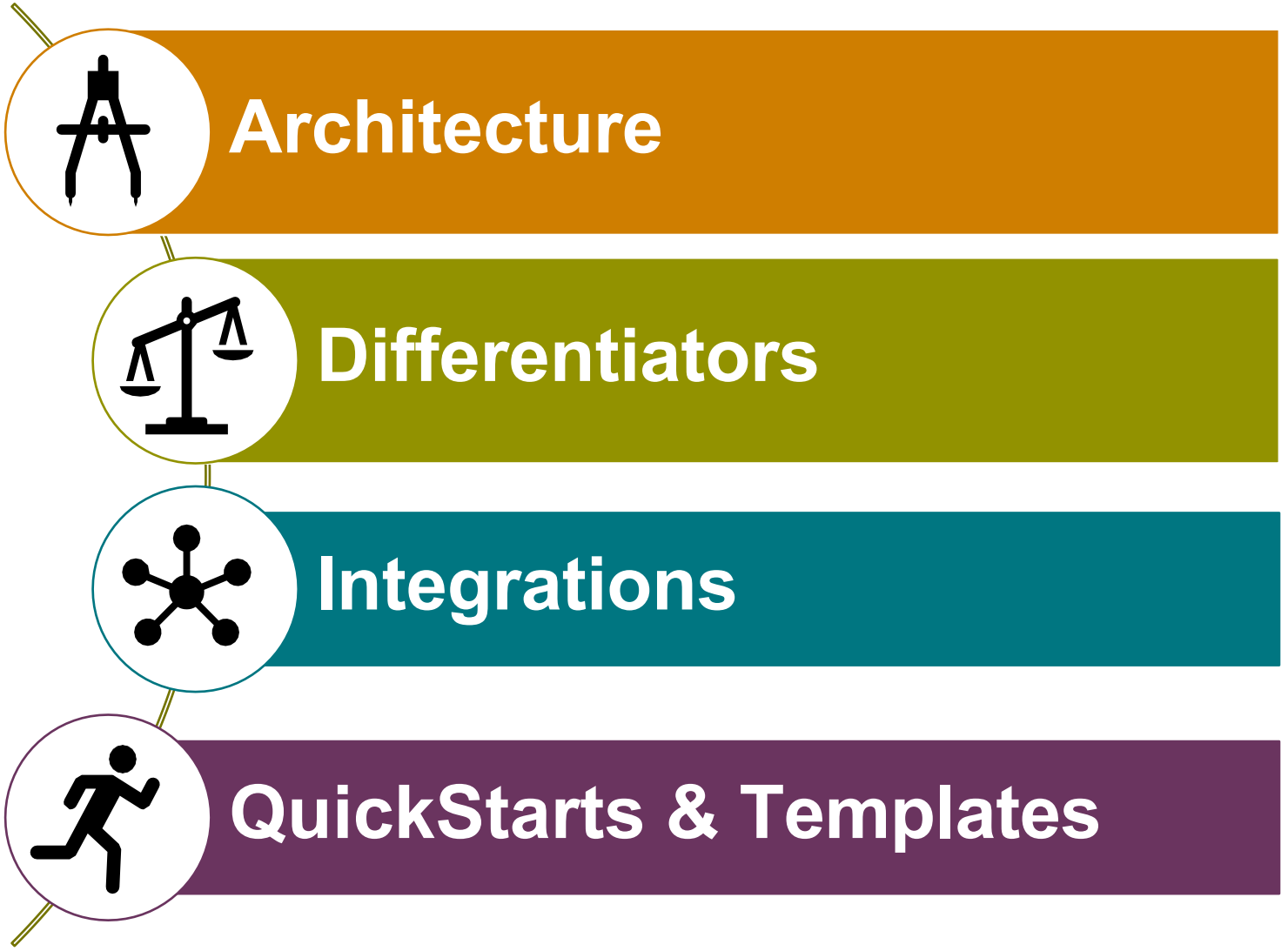
Technology, when deployed correctly, makes the art of data-based decision making faster and easier

- Customizing the technology (software) is the key to creating value
- Customized scenarios and analysis creates focus
- Asking the right questions is also important – an outside-in perspective can be invaluable

CFOs appreciate more than functionality in FP&A software

- Layout, UI, Structure and Logic
- Ease of deployment, learning and retention

Architecture & Functionality Overview



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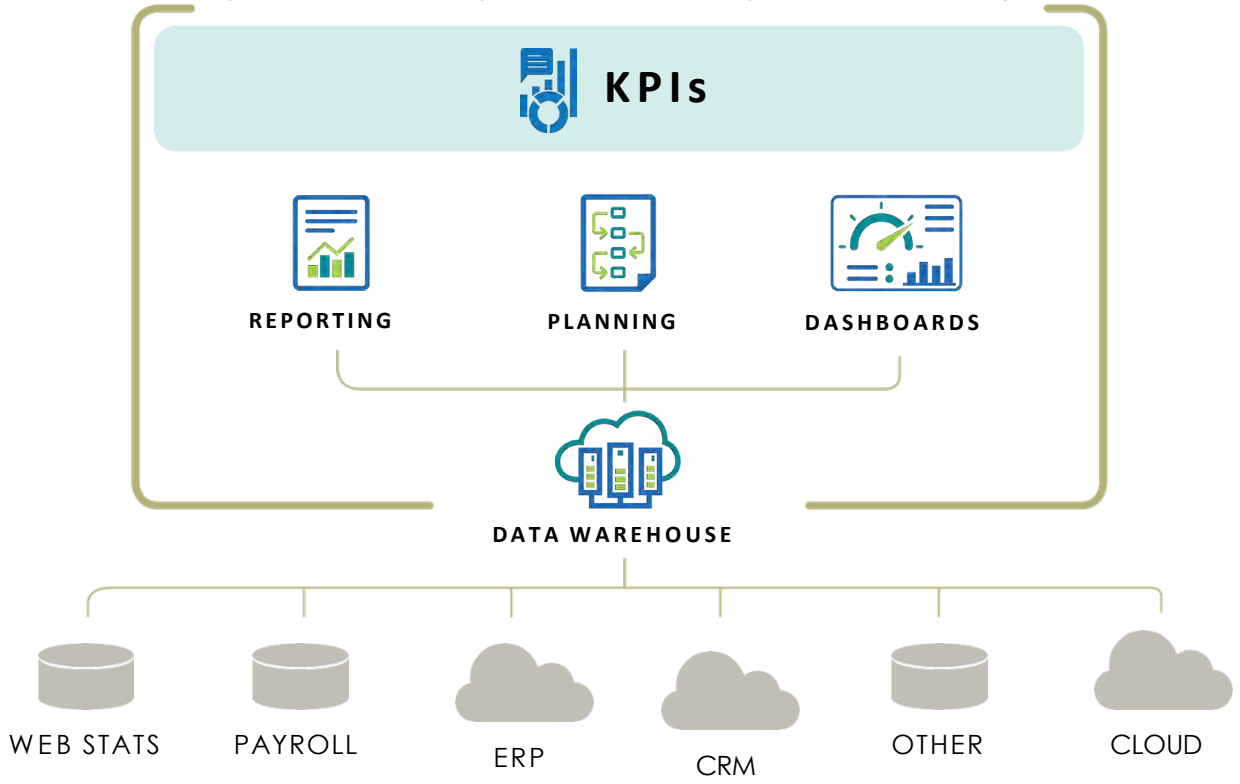

Complete Insight…

Faster, Better Decisions

Key Benefits

- Single cloud portal and database
- Rapid configuration with Templates
- Quick time to value
- Combines the best of CPM and BI

Solver Apps

- Process automation
- KPIs and Alerts
- Dashboards
- Reporting & Consolidation
- Budgeting & Forecasting
- Intelligent Data Warehouse
- Marketplace with Templates
- Data source connectors

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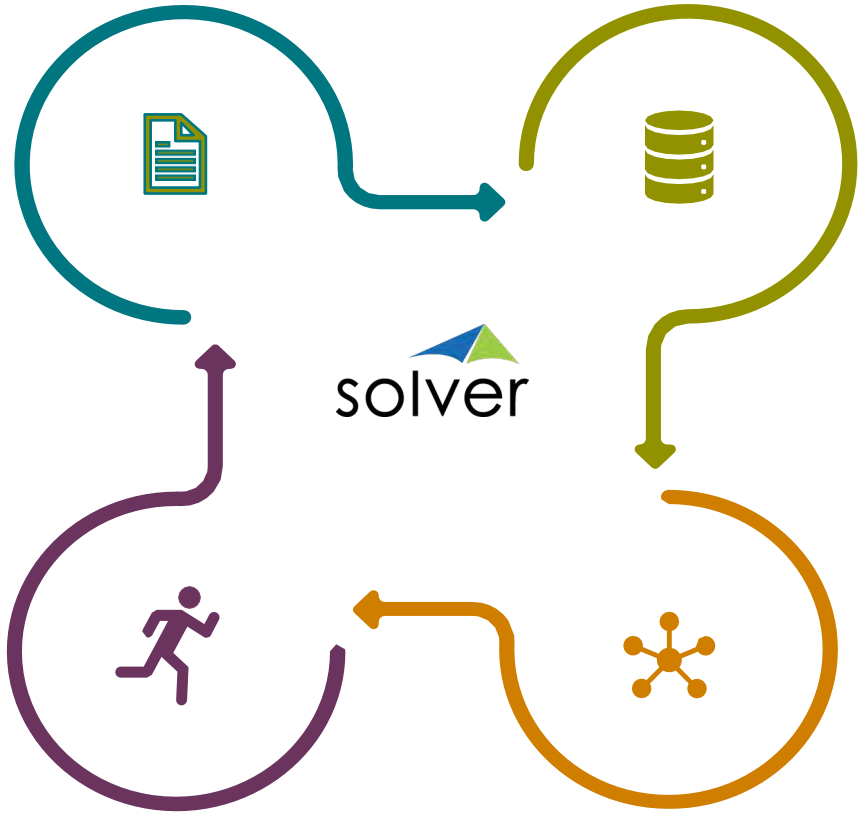
Differentiators

Excel-Based Report Designer

Azure SQL Server Data Warehouse



QuickStarts & Pre-Built Templates

Pre-Built Connectors for Integration

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Integrations

Solver Cloud
PRE-BUILT SOLVER CONNECTORS:

- File-based loading
- Acumatica
- Dynamics 365 FO/BC/Sales
- Dynamics NAV/GP/SL/AX (Gateway)
- Google Analytics
- NetSuite
- Power BI (Connector loading data from Solver)
- QuickBooks Online
- Sage Intacct (API)
- Sage 100, 300, 500, X3 (Gateway)
- Salesforce
- SAP Business One SQL/Hana, SAP ByDesign
- Solver Gateway: Connectivity to any on-premises or private cloud SQL/Oracle data source

Solver Hybrid Cloud
LIVE CLOUD REPORTING FOR ON-PREMISES ERPs

- Dynamics GP/ NAV/SL
- Sage 500/300/100 (SQL)
- SAP B1 (SQL)

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Solver

QuickStarts & Templates

01 QuickStart Integration Wizard

- Connects ERP to Solver with a pre-mapped GL integration
- Account mapping to Solver Stargate™ which enables use of templates
- Automatically loads data and configures the Solver Data Warehouse

02 Template Marketplace

- Reporting | Financial reports
- Planning | Budget and Forecast input forms
- Dashboards | Pre-built Power BI dashboards

03 100s of Additional Templates

- Over 500 additional templates available
- Templates by industry
- Easily install in your environment and modify

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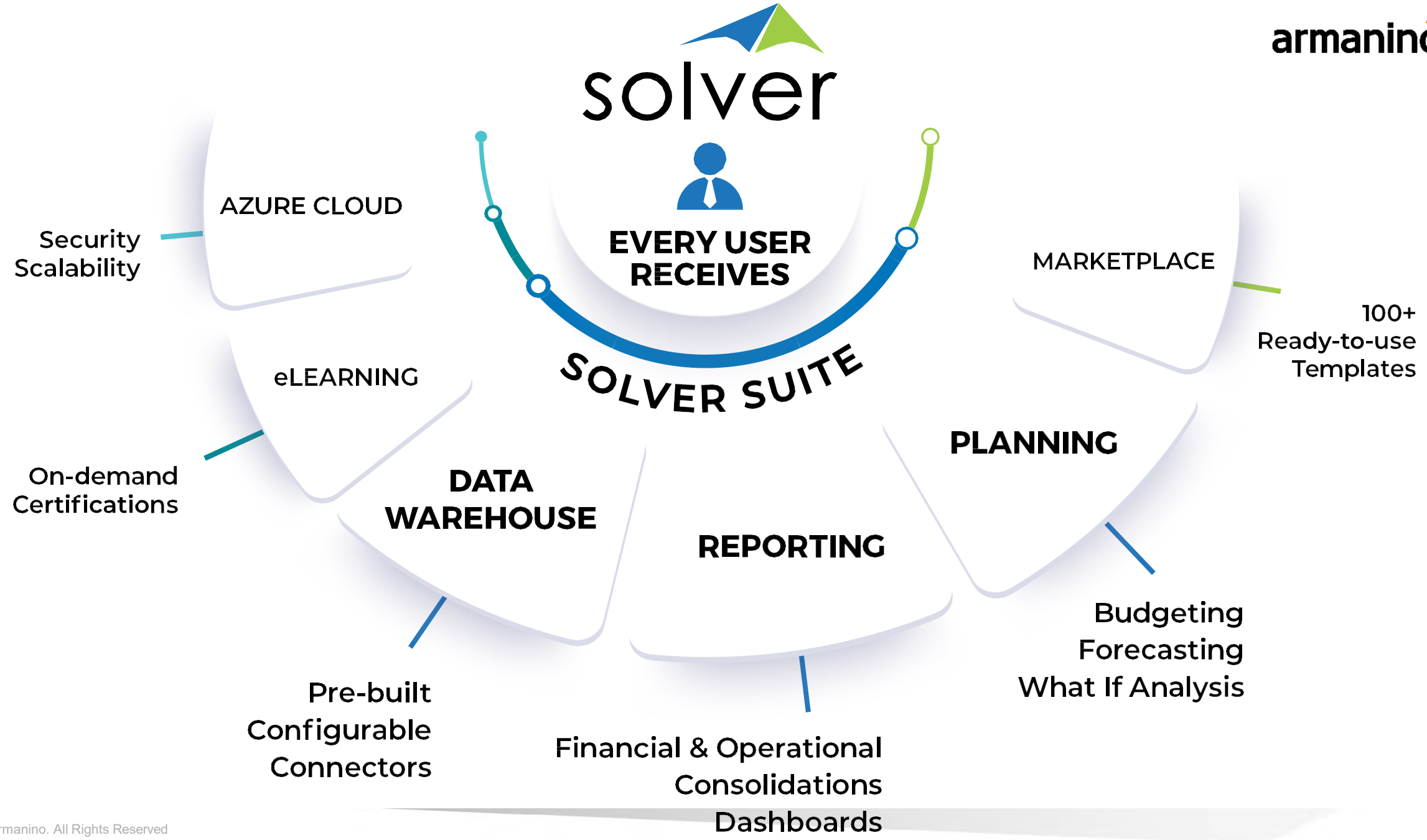
Quick Solver Presentation

solver



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Accelerate Time-to-Value

Solver's QuickStart gets you up and running with a Corporate Performance Management (CPM) solution in just one day, not months from now like other CPMs.

Simple Pricing to Accelerate Better Decisions

Solver makes it easy to solve today's complex challenges with simple and clear pricing.

$100/month per user*

Viewer license: $8/month per user

One-Day Deployment

Solver's QuickStart rapid deployment delivers the ultimate in time-to-value by implementing reporting, planning, and dashboarding in just one day.

100+ Financial Templates

On day one, you get access to the Solver Marketplace, which houses over 100 ready-to-use reports, planning forms, and dashboards.

$100K+ Value Available Day 1

Everything you get access to with QuickStart on the first day – at no extra charge – would cost over $100,000 with another CPM solution.

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Q&A

Thank you for attending!

Additional Questions?

Reach out to us at

Experts@armanino.com

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Additional Resources & Information

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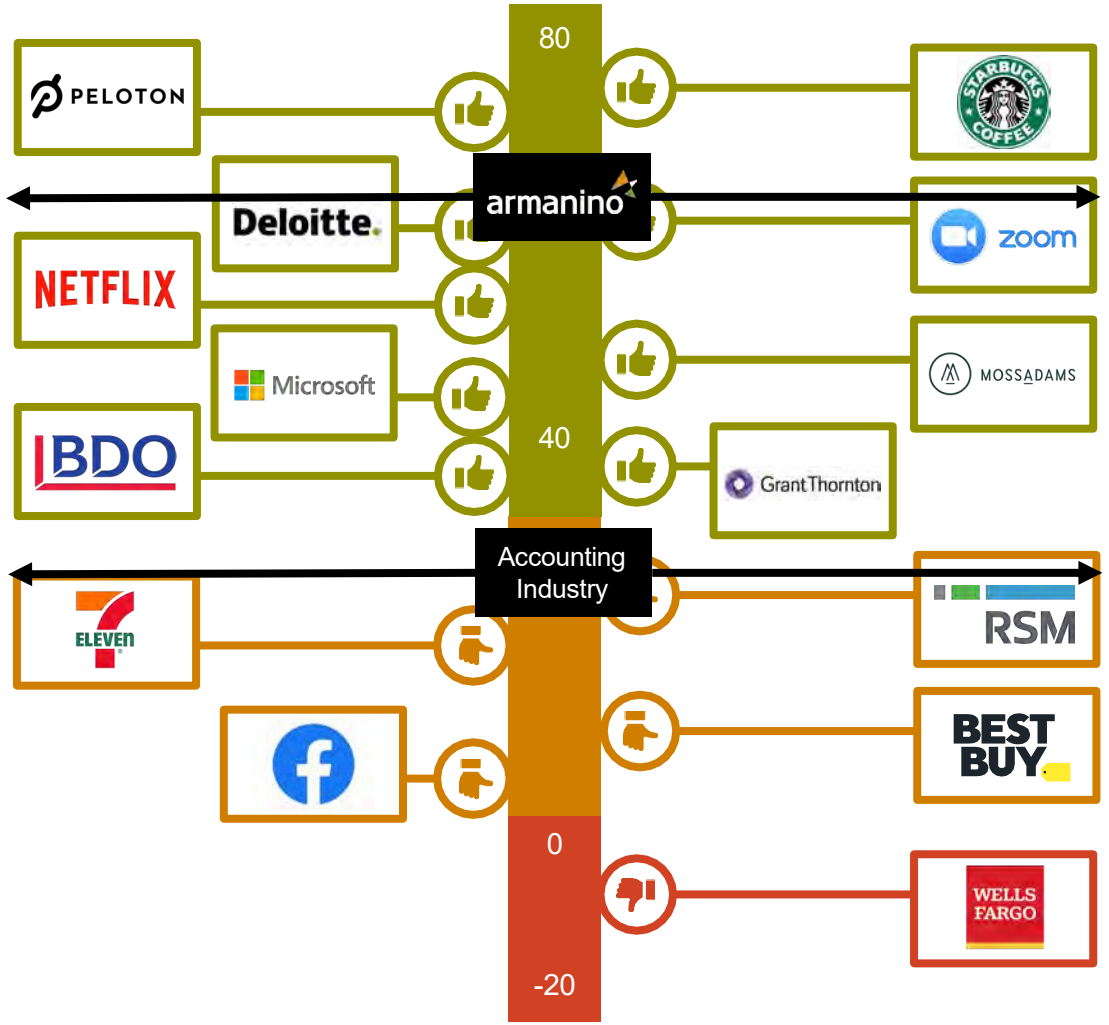
OUR CLIENTS' VIEW

We're Just What You Need

A Net Promoter® Score (NPS) is used by more than two-thirds of Fortune 1000 companies. **Armanino's NPS (68) is almost two times higher** than the accounting industry average (38), and it places the firm scores closest to household name brands such as Starbucks, Peloton and Zoom.



5 YEARS DIAMOND AWARD 2017 - 2021

BEST of Accounting™ CLIENT SATISFACTION

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OUR PROMISE TO YOU

Reimagine Your Potential

Unconventional Approach

We're a vested, entrepreneurial partner who sees your organization through a 360 lens and finds opportunity at every stage

Comfort in Change

Our experts provide guidance and support while quickly facilitating transformation that gives you a competitive advantage.

Focused on You

Our integrated teams and solutions deliver tailored insights to bring you more value and clarity throughout your journey.

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A New and Better Way for Today and Tomorrow

Equipping you with the insights and tools needed to redefine what's possible

COMPLIANCE & REGULATORY

- Tax Planning
- Trust & Estate
- SOX
- Contract

ASSURANCE & ADVISORY

- Cybersecurity
- SOC
- Restructuring
- Revenue Recognition

STRATEGY & PLANNING

- Corporate Strategy
- Strategic Advisory
- Benchmarking
- Business Transformation

STAFFING & DEVELOPMENT

- Payroll
- Health Benefits
- Executive Search
- Interim Placement

TECHNOLOGY SYSTEMS

- ERP
- CRM
- Business Intelligence
- Managed Services

ACCOUNTING & BACKOFFICE

- Bookkeeping
- Budgeting/Forecasting
- Account Receivable
- Accounts Payable

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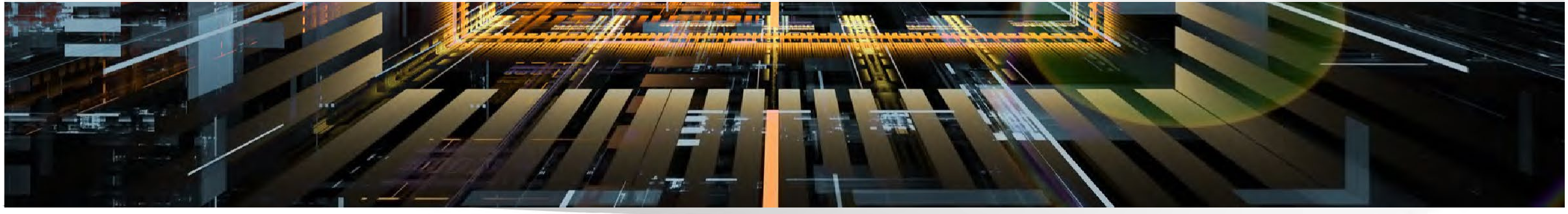
Delivering impactful, bold solutions that increase clarity
and spark success for today and tomorrow.



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