

POSSIBLE (RE)DEFINED

Coffee Break: FP&A For Professional Services Industry

WHAT WE'LL DISCUSS

Today's Agenda

- Learning Objectives & Introductions
- Professional Services Industry Challenges
- Typical Professional Services KPIs
- Utilizing an FP&A Solution
- Closing and Q&A



WEBINAR OVERVIEW

Learning Objectives

Empower practice leaders with self-service reporting and analysis to make better decisions faster

Improve visibility and reporting

Gain efficiency by automating data

Improve cost discipline and prioritize workforce

WELCOME

Today's Presenters



Jason Worth

Manager, Armanino
Advisory LLC



Gabe Macis

Senior Manager,
Armanino Advisory LLC



Drive profitable growth with limited insights into people, projects, profits



Improve Project Efficiency and Profitability



Compete for talent to deliver the portfolio of the future



Drive continuous innovation & transformation

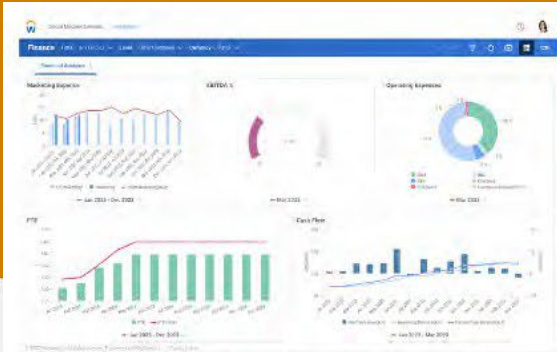
PROFESSIONAL SERVICES

Key Drivers

- **It's about key drivers of the business**
 - **Bill through:** how much of the WIP are you billing timely
 - **Realization:** how much of the WIP are you billing vs. letting hit the cutting room floor
 - **Utilization:** managing the right balance of billable to non-billable hours for your people
 - **Non-people Costs as % of Revenue:** how well are you managing costs beyond salaries
 - **Personnel Planning & Demand Planning**
- **Leverage:** how effectively are you multiplying the impact of your partners/leaders

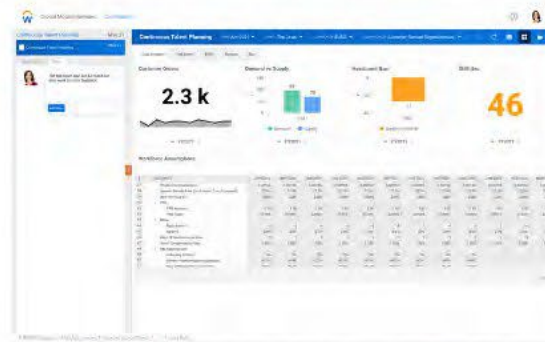
Let's Talk Workday's Adaptive Planning

- Armanino has been a trusted partner to implement Workday's Adaptive Planning for over 13 years
- Enterprise planning and reporting cloud solution (login right from your browser)
- Integrate your data from your systems/applications (ERP, CRM, HRIS, etc.)
- All actuals and plan data, reporting, modeling, versions, dashboards all in one silo!



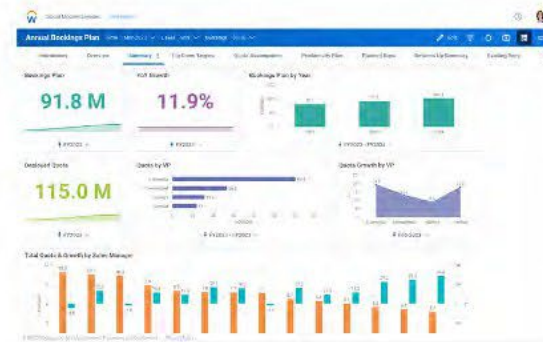
Financial planning.

Flexible budgeting, scenario planning, and reporting let you continuously plan for what's next and respond to changes with agility.



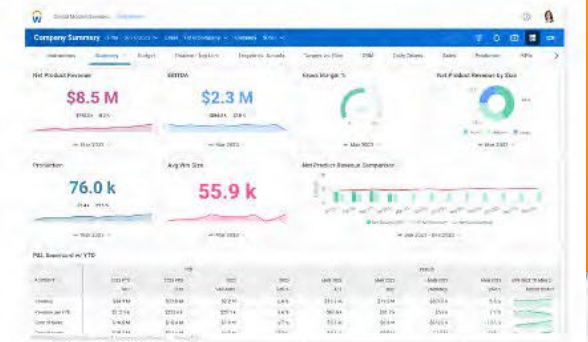
Workforce planning.

Plan for the skills you need today and tomorrow by department, cost center, level, location, and more.



Sales planning.

Dynamically plan sales resources, set quotas, and optimize rep capacity—all while keeping your eye on the bottom line.



Operational planning.

Enable company-wide planning in concert with finance, and drive better collaboration across departments and functions.

Thank you for
attending!

Additional Questions?

Reach out to us at

Experts@armanino.com



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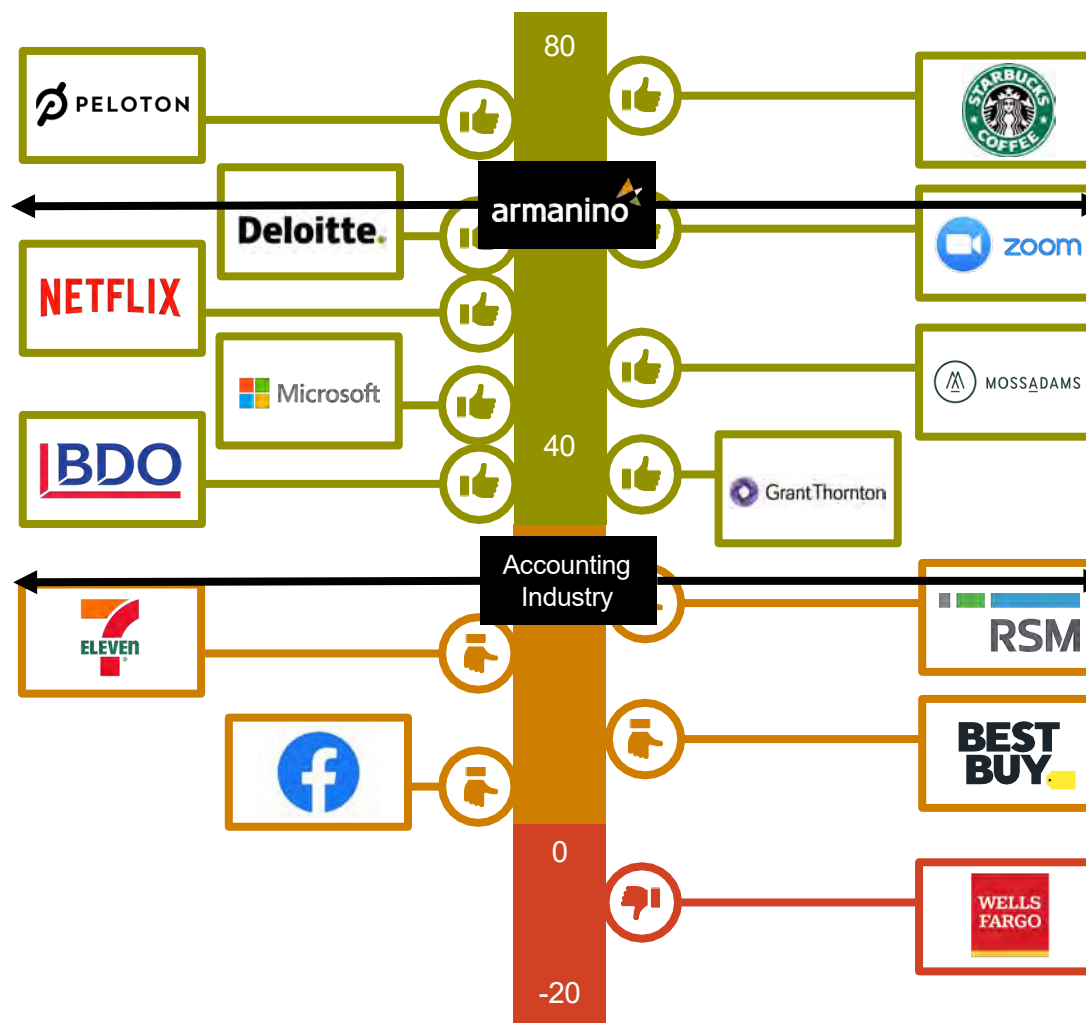
Additional Resources & Information

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.



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.

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

Possible *(Re)Defined*TM

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

Armanino Operates in an Alternative Practice Structure:

“Armanino” is the brand name under which Armanino LLP, Armanino CPA LLP, and Armanino Advisory LLC, independently owned entities, provide professional services in an alternative practice structure in accordance with law, regulations, and professional standards. Armanino LLP and Armanino CPA LLP are licensed independent CPA firms that provide attest services, and Armanino Advisory LLC and its subsidiary entities provide tax, advisory, and business consulting services. Armanino Advisory LLC and its subsidiary entities are not licensed CPA firms.