

POSSIBLE (RE)DEFINED

Future Horizons in Finance Professional Services

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EXPLORING NEW AREAS

Agenda

- CPE Requirements & Housekeeping
- Presenter Introductions
- Future of Finance
- Challenges and Making the Change
- Roadmap & Tech Stack
- Lessons Learned & What Would We Change

Learning Objectives

KNOWLEDGE



Recognize when you're ready to make that change.



Hear perspectives from a CFO and Controller, why the move was necessary.



Review examples of timeline roadmaps and phased approaches in the journey forward

CPE INFORMATION

Program Level: BASIC

Recommended CPE: 1

Field of Study: Business Management and Organization Program

Prerequisite: NONE

Advanced Preparation: NONE

WELCOME

Today's Presenters



Justin Mitkus

Director



John Kogan

CFO



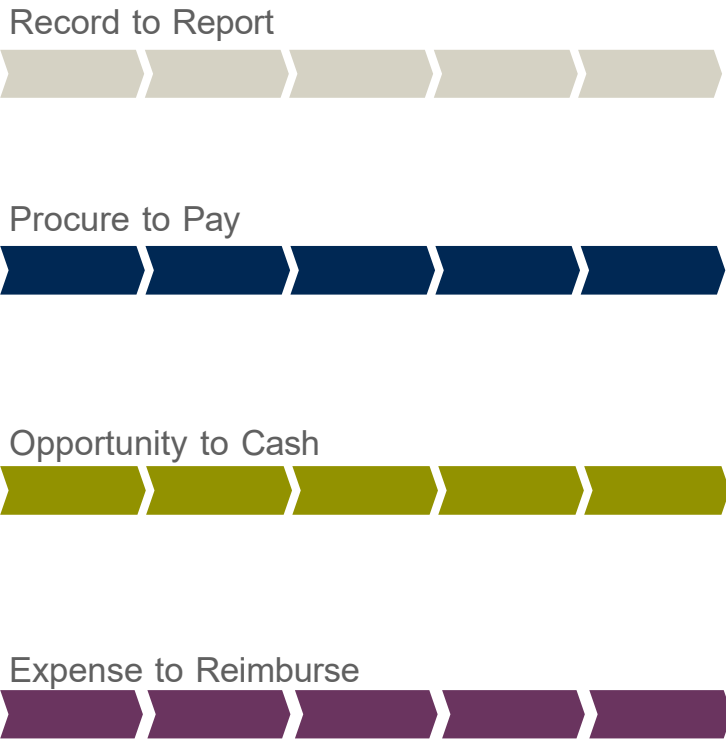
Carrie Augustine

Head of Finance Transformation



The Traditional Finance Organization

Traditional Processes

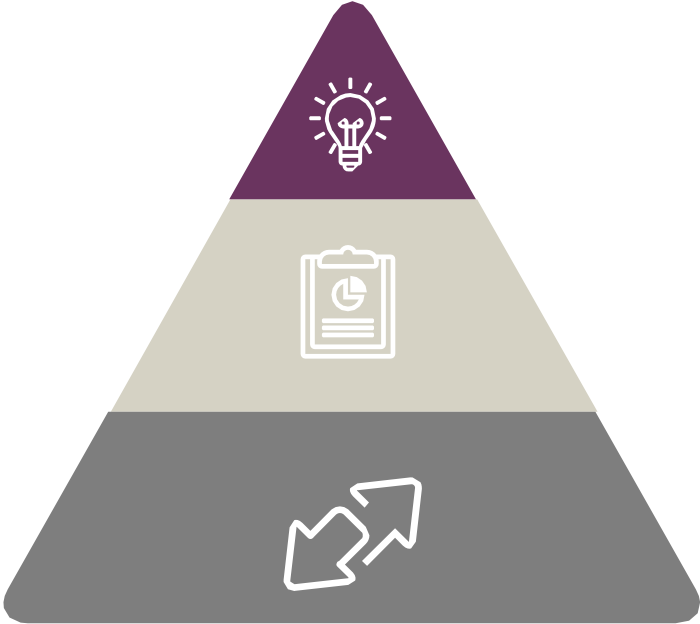


Traditional Time Allocation

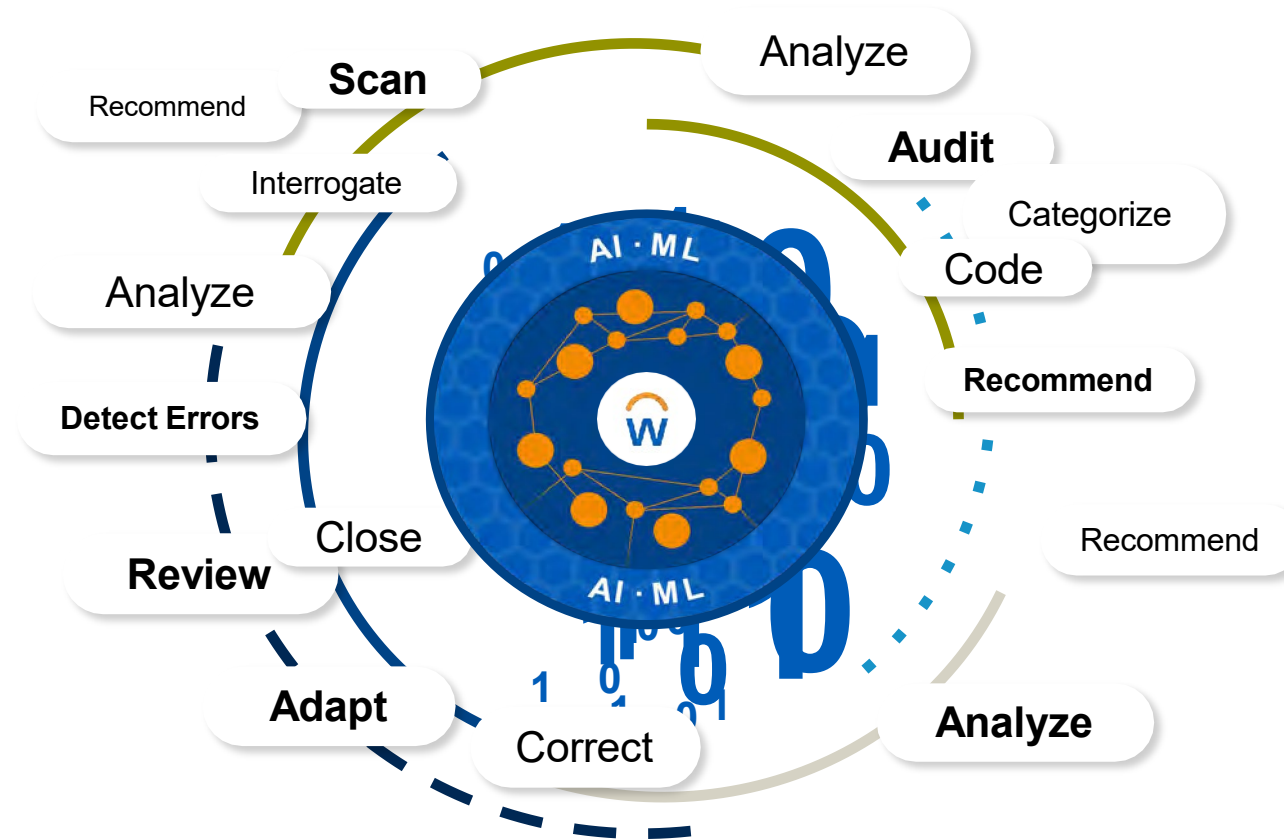
Insight &
Action

Reporting &
Compliance

Data Collection
& Processing



A Modern Approach



The Future of Work Requires New Ways of Working

Time Allocation with the Business Needs

Insight &
Action



Reporting &
Compliance



Data Collection
& Processing



Challenges



Scalability



Operational
inefficiencies



Increase in time to
process and report



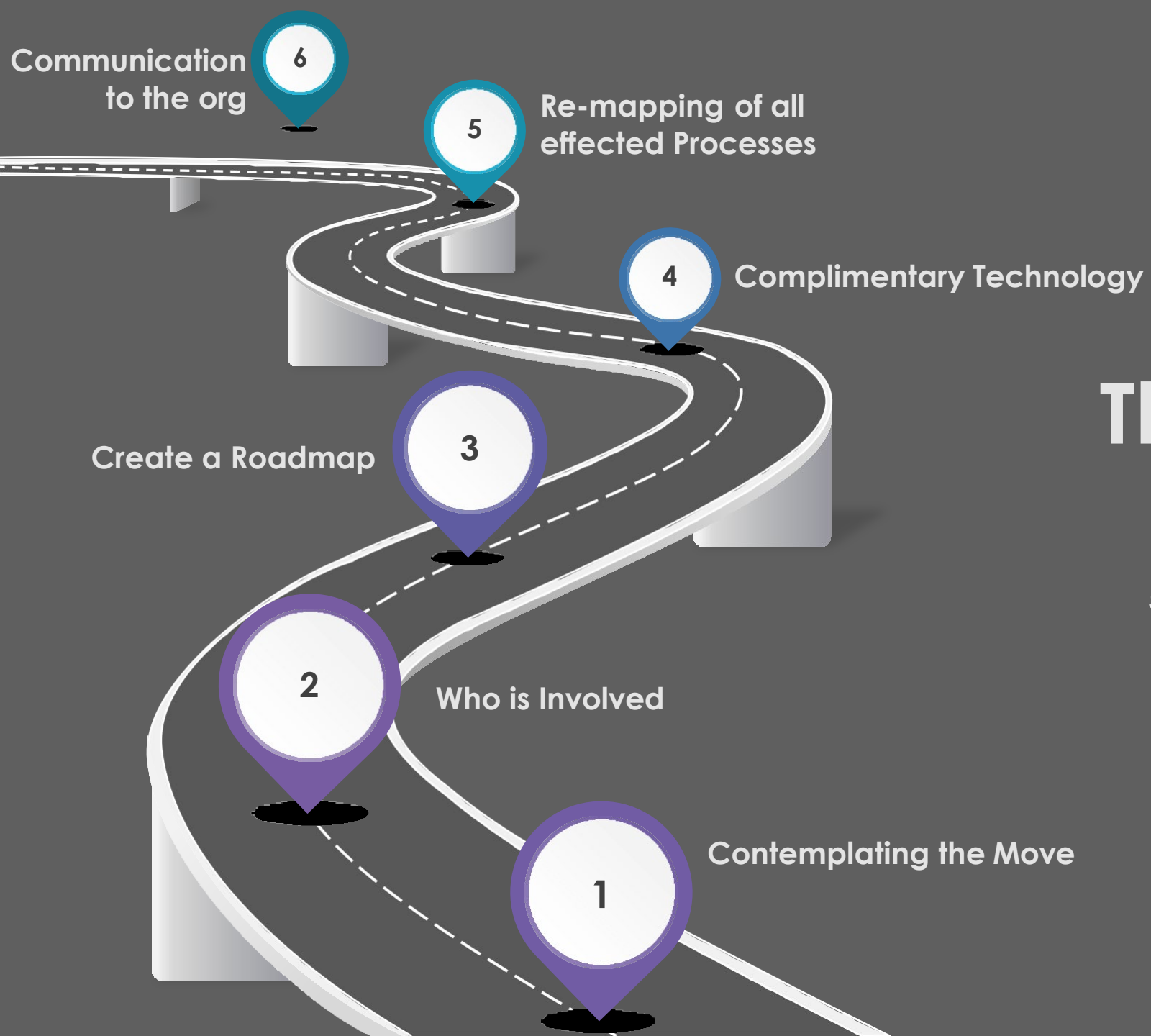
Data issues due to
multiple systems
and no master data



Insufficient
Self-Service



Insufficient insight
to business drivers



The Roadmap to Success

Starting with creating a vision and working through the innovation framework to create a new state.

WHAT ARE WE MOVING FROM?

→

WHAT ARE WE MOVING TO?

Applicant Tracking

Human Capital Management
Absences
Benefits
Time-Tracking (Non-Exempt)
Payroll

Compensation Planning

Accounting
Banking
Customer Accounts
(Software Sales)

Procurement
Supplier Accounts

Expense Management

Time Entry and Billing

icims

UltiPro

COMP-XL

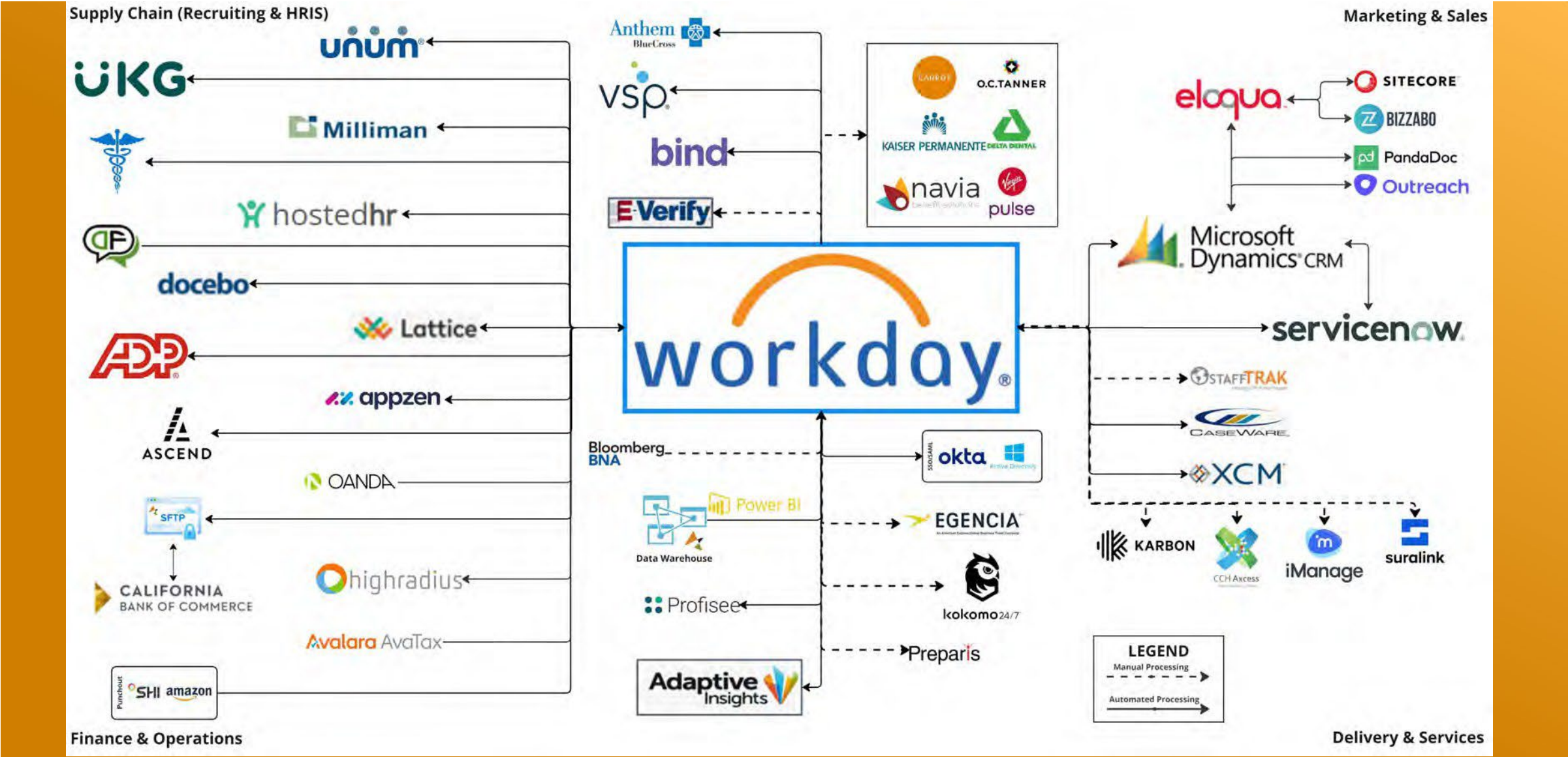
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C. CONCUR

PM





RESULTS AND NEXT STEPS

Lessons Learned

**Process re-engineering
reaches into every
corner of the business**

**More people will
spend more time on
this than anyone
imagines upfront**

**Communicating the
'why' is critical for
getting people
onboard for this effort**

**Uncertainty reigns
because you don't
know the outcome**

Results and Next Steps

One unified platform that provides a single source of truth



Better visibility and faster decision-making based on real-time data



Greater adaptability and flexibility to support company growth and change



Improved efficiency and productivity as manual processes are automated



Faster reporting with greater peace of mind thanks to accurate data



Faster time to close, with the expectation of soon achieving it in seven days instead of 15 days



Thank you for
attending!

Q&A

Additional Questions?

Reach out to us at

Experts@armanino.com

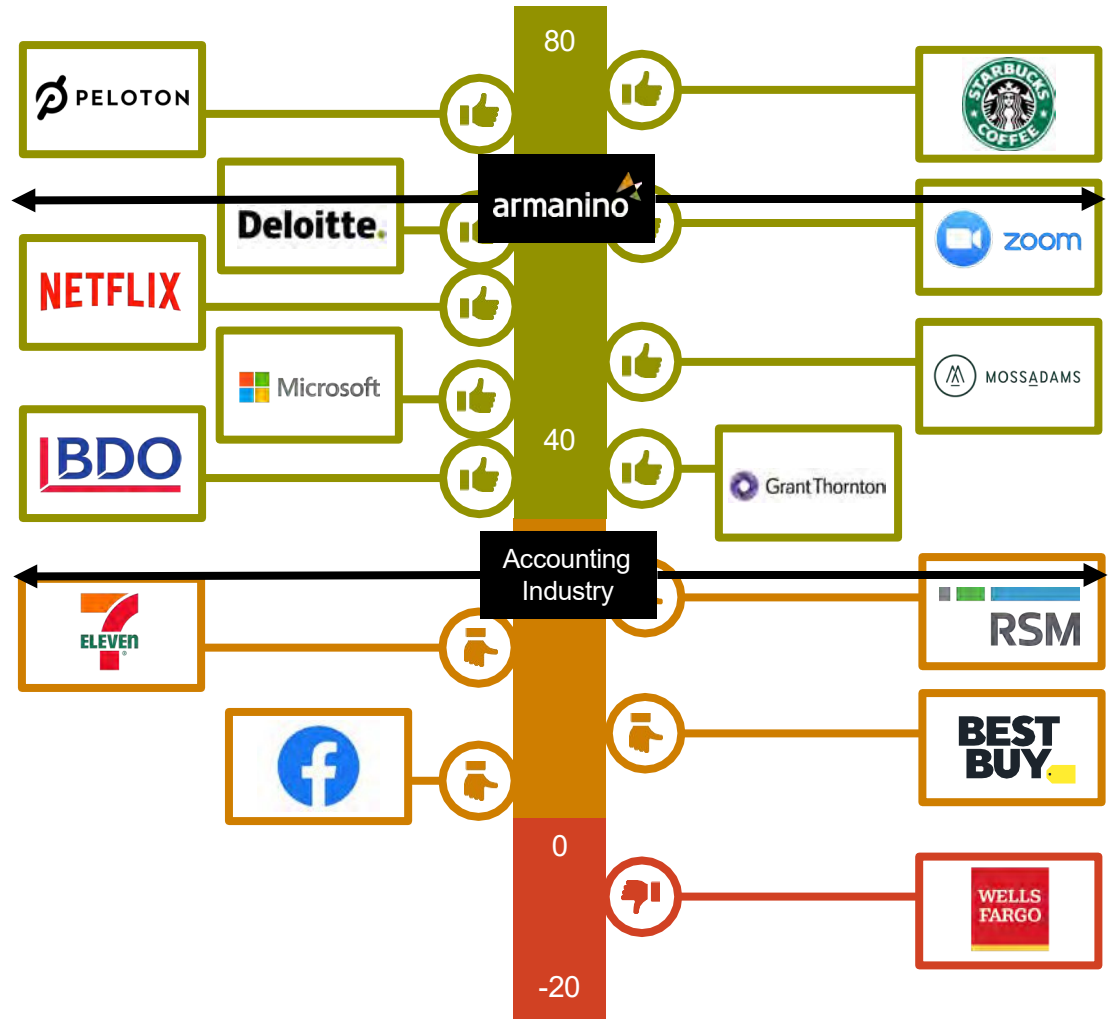


OUR CLIENTS' VIEW

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.



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

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.