

Planful and RSM

Planful delivers a vision of Continuous Planning by accelerating the end-to-end FP&A process and fostering business-wide participation in agile financial planning and decision-making.



www.rsmuk.com/planful

Planful and RSM – helping your finance function prepare for the future

In today's dynamic business environment, you need a platform that is powerful enough to meet your needs today and in the future.

We provide a single, cloud-based FP&A platform with everything you need - planning, consolidation, modelling, reporting, and analytics - in one place and accessible to everyone from anywhere. We help you automate everyday processes to provide insights and shorten the time it takes to turn those insights into measurable actions. The result is a company that is nimble and efficient, regardless of size or complexity that can remain competitive and ahead of the competition.

Typical business challenges that the Planful platform addresses:



Are your consolidation needs outgrowing your Excel model?



Does your current planning, consolidation and reporting tool require external expertise to maintain?



Do you have multiple versions of data sources with limited access and visibility?



Do your current Excel models limit your ability to align KPI's and strategic plans to budgets?



Does your financial data lack standardisation, limiting your ability to analyse business performance?



Do you spend your month end getting the numbers right, leaving little time to analyse the results and provide decision support?

Corporate performance management services from one of the largest business advisory firms in the UK

We provide full transformation services to support companies in transforming their business and make effectively use digital technology. This includes finance transformation, implementation and support services using fully integrated, cloud-based FP&A solutions. We have a powerful network of resources and experts in offices globally.

We can help you to assess, prepare and implement a practical action plan to improve your financial consolidation, budgeting, forecasting, reporting and modelling processes. By working with us we can help empower your business and make it more agile.

Empowering finance to lead in a dynamic world

Planful provides a proven, scalable platform that accelerates reporting, analytics, financial planning, and the close process.

As businesses evolve, their finance systems must adapt. For example, an organisation that simply needs a budgeting solution today may acquire an overseas operation - introducing the need to perform consolidation, improve budgeting processes and connect financial plans to operational data from sales, manufacturing, or distribution.



Powerful

Complete suite
Functional depth
United Finance and Operations



Easy to use

Excel formula language and experience
Point and click setup
Finance owned and managed



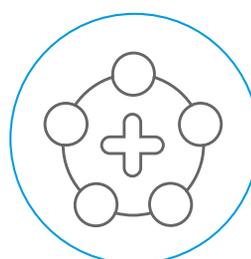
Robust reporting

Robust library of reporting formats and delivery options
Self service reporting



Fast to deploy

Eight to 12 weeks average implementation
Cloud deployment
Pre-built financial intelligence



A single source of truth

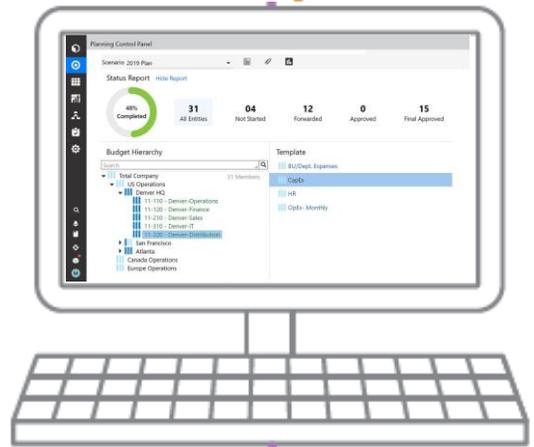
Fully integrated platform
Ability to integrate with any source data – ERP, CRM, data warehouse and more



Key features

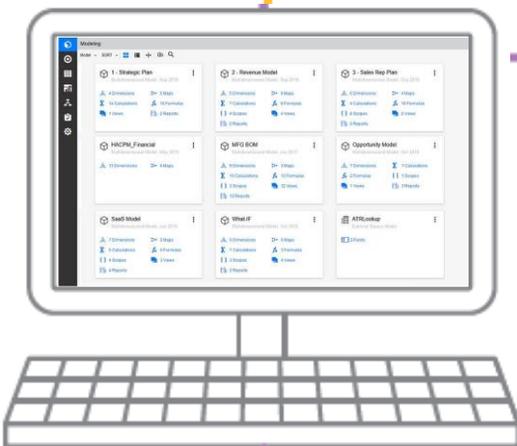
Planning, budgeting and forecasting

Automate your financial planning, budgeting, and forecasting processes. Use pre-built templates or build your own planning templates to meet the financial, workforce, capital planning needs of your organisation. Support continuous planning with rolling forecasts and driver-based planning, to keep up to the pace of your business.



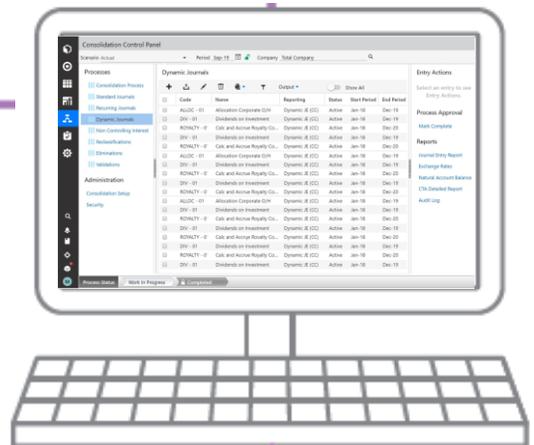
Advanced Modelling

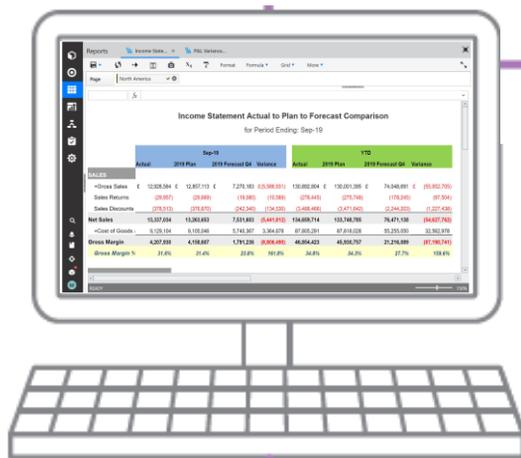
Connect operations with your financial plans and forecasts. Update business driver assumptions in one model and see the impact on all associated models as well as your financial plan. With driver-based assumptions specific to your business, and unlimited dimensions in your models, you can increase business agility and drive actionable insight throughout your organisation.



Advanced Consolidation and Close

Accelerate and automate your financial close and compliance processes. Easily connect data from multiple systems across your organisation. Whether your company has more than one general ledger, plans to acquire another company, leverages global currencies, or is preparing for an external audit, Planful Consolidation will meet your needs.





Financial and management reporting

Planful reporting provides a comprehensive library of reporting formats and delivery options, enabling end-users to produce a wide range of interactive financial and management reports leveraging a single source of truth. Generate **US GAAP and IFRS-compliant** balance sheets, income statements, statements of cash flow, and other financial and statutory reports.

Self service interactive dashboards

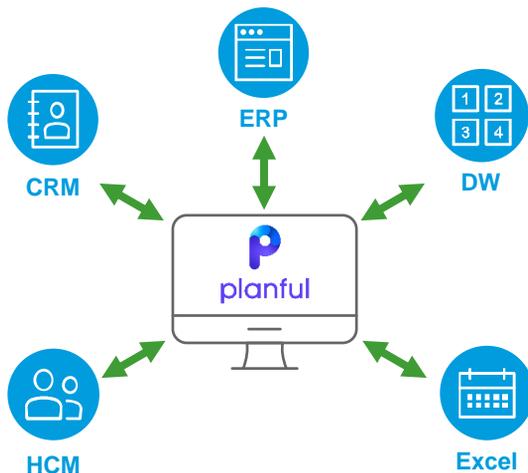
Planful offers powerful visualisation and interactive dashboards for both financial and non-financial data. Keep an eye on key metrics that drive your business performance to easily spot trends, identify performance gaps, and stay ahead of business problems. Drill down into charts to get more details and get a deeper understanding of your data.



Data integration for single source of the truth

Connect to any system and load any source data into Planful with the ability to combine operational and finance data that is meaningful and stays current at all times. Planful provides powerful, bi-directional data integration capabilities allowing access to data from ERP, HCM, CRM, data warehouses, spreadsheets, and other sources, whether they are on-premise or cloud-based.

The platform supports the integration of a variety of data types including GL summary balances, metadata, transaction details or statistical and operational data and even users, employees, leads, opportunities, and many more.



Planful: The financial planning and close platform that evolves with your business

Partnering with Planful and RSM will result in you spending less time in spreadsheets and more time making faster, more strategic business decisions.

Planful is a fully integrated solution with automated connectivity between operational modelling and financial planning, finance teams and the business can have a meaningful, effective and collaborative partnership.

The key benefits of Planful include:

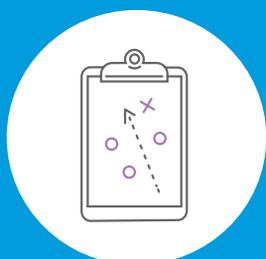


About RSM

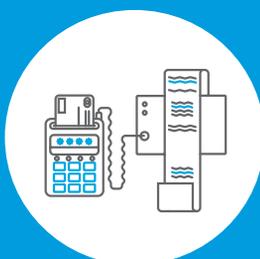
RSM is a leading provider of audit, tax and consulting services to middle market leaders, globally. We are the seventh largest UK accountancy firm with over 3,800 partners and staff working across 35 offices in the UK.

Our award-winning Technology and Management Consulting practice consists of 100+ highly experienced business and IT consultants, who have strong experience of financial transformation, business improvement, strategic planning and financial accounting.

We have in-depth understanding of evolving technologies and best practice in delivering IT services. We specialise in the technologies relevant to mid-sized to corporate, high growth businesses.



Business improvement



Robotics process automation



Finance transformation



Digital finance solutions



IT and digital strategy



System selection and implementation

Award-winning

We are proud to have been rated and recommended by clients and peers and recognised as one of the UK's leading Management Consultants (2018 and 2019) for our IT strategy, IT implementation and finance, risk and compliance services.



Partner of the Year

RSM has been recognised by Planful (formally Host Analytics) as partner of the year 2019 winning the award for global systems integrator



PARTNER OF THE YEAY 2019

Contact us

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