

The Importance of **BUDGETING & FORECASTING AUTOMATION** Using CPM – EPM Systems



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INTRODUCTION

Automating budgeting and forecasting is crucial for modern FP&A teams. It enhances efficiency, accuracy, and strategic planning. This carousel will explore the importance of automation and guide you in selecting the right FP&A software (CPM/EPM), incorporating AI capabilities, predictive analytics, and scenario planning.



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01 **IMPORTANCE OF AUTOMATION IN BUDGETING AND FORECASTING**

Automating these processes can transform financial planning and analysis. Here's why FP&A teams must lead this transformation:

Increased Efficiency

Streamlines processes, allowing FP&A professionals to focus on value-added tasks.

Enhanced Accuracy

Reduces human errors and improves confidence in forecasts.





Real-time Insights

Provides up-to-date data to support agile decision-making.



Scenario Analysis

Enables FP&A to evaluate multiple scenarios, vital for strategic planning.



Strategic Planning

Aligns financial insights with broader business strategies, guided by FP&A expertise.

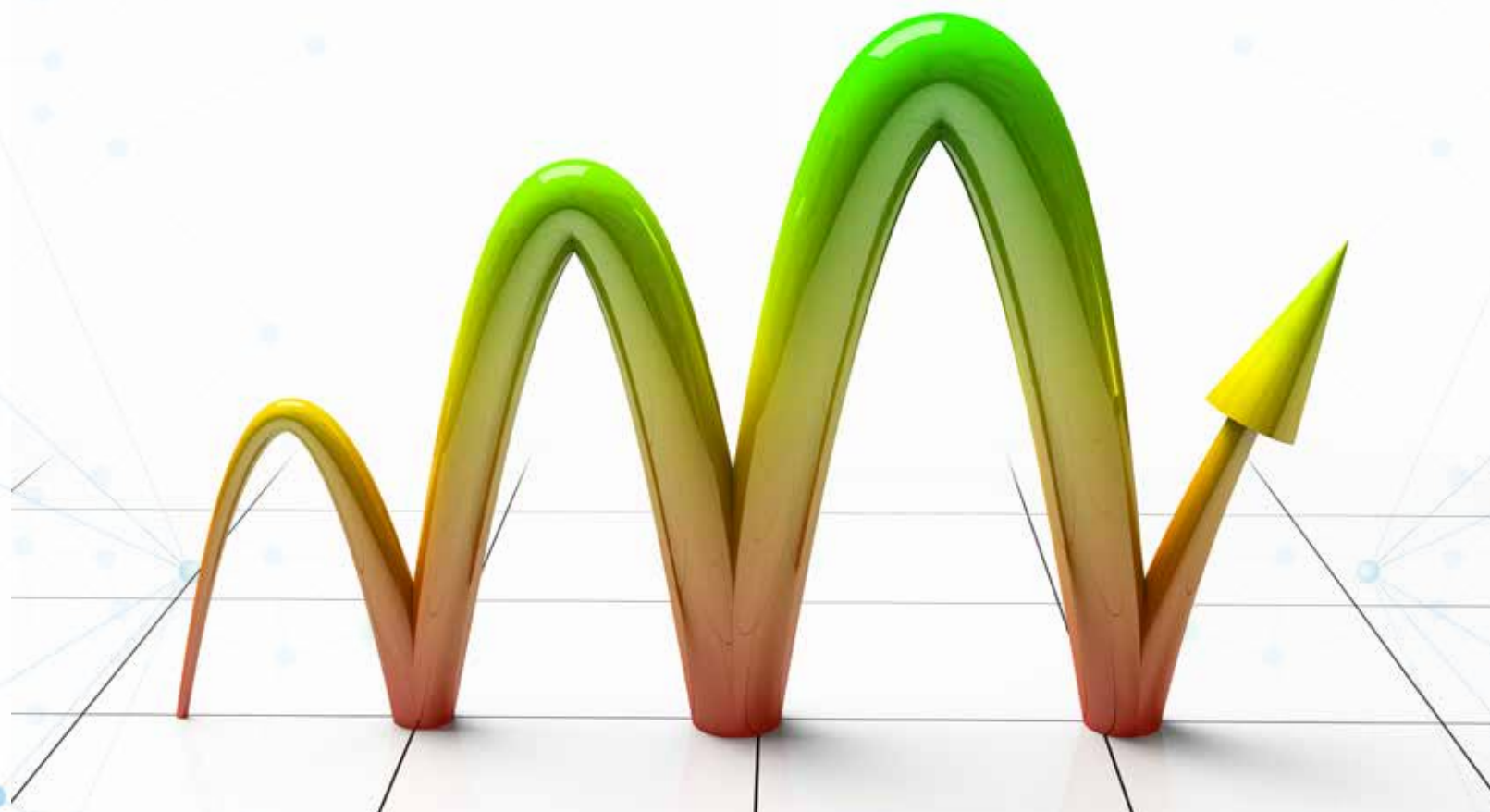
Automation empowers FP&A teams to focus on driving strategy and performance rather than manual data collection.



02 **FACT SLIDE**

DID YOU KNOW?

Organizations using automated FP&A software report a 50% reduction in planning cycle times and a **25%** increase in forecast accuracy. FP&A teams play a pivotal role in these transformations by managing the transition and ensuring adoption.



03 **KEY FEATURES OF FP&A SOFTWARE**

Selecting the right software is vital. FP&A professionals should prioritize these features:

Integration Capabilities

Seamlessly connects with ERP and other systems, ensuring smooth workflows.

AI Capabilities

Includes predictive analytics, machine learning, and scenario planning tools for forward-looking insights.





User-friendly Interface

Simplifies adoption across the organization.



Scalability

Grows with the company's evolving needs.



Collaborative Tools

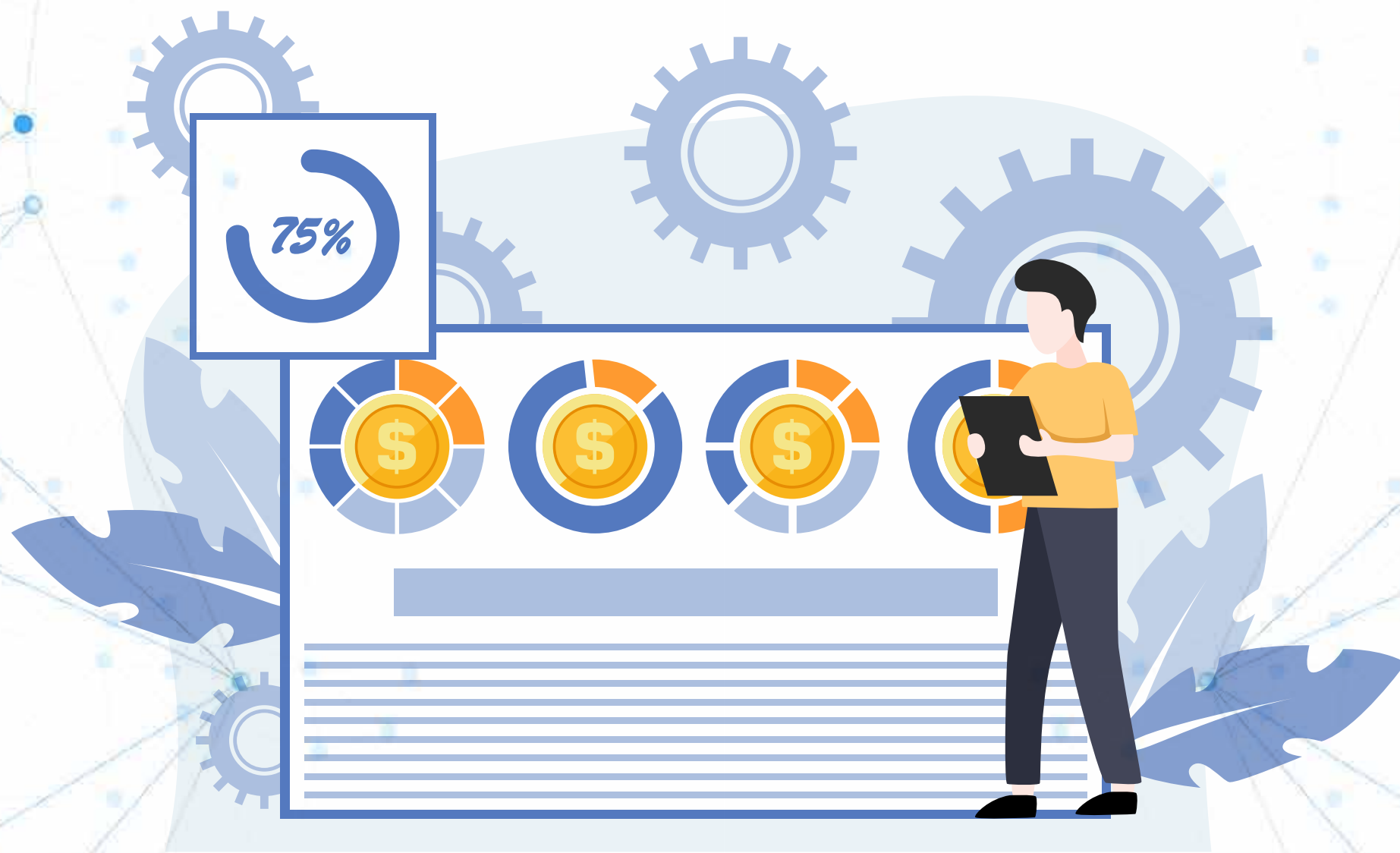
Enhances teamwork and decision-making.

AI capabilities allow FP&A teams to provide advanced insights, predict trends, and support strategic planning.



04 *CURIOSITY SLIDE*

Curious about how automation can elevate your FP&A processes? Keep scrolling!



05 **BENEFITS OF CPM/EPM SYSTEMS**

Implementing CPM/EPM systems offers numerous advantages, spearheaded by FP&A teams:

Improved Decision-Making

FP&A teams utilize data-driven insights for better choices.

Resource Optimization

Efficiently allocates resources based on data analysis





Enhanced Compliance

Supports regulatory adherence with automated workflows.



Performance Tracking

Monitors KPIs and aligns them with strategic goals.



Cost Savings

Reduces operational expenses through efficiency gains.

FP&A's role in these systems ensures alignment with corporate strategies and goals.



06 **CASE STUDY - IMPROVING PROFITABILITY WITH AUTOMATION**

CASE STUDY: ADTECH COMPANY

An AdTech company improved profitability through CPM/EPM automation. FP&A professionals were instrumental in these outcomes:

Enhanced Forecast Accuracy

Achieved **90%** accuracy, guided by FP&A scenario modelling.

Resource Optimization

Reduced costs by **20%**, facilitated by FP&A-driven insights.





Strategic Alignment

Aligned financial and business strategies under FP&A's leadership.



Real-time Reporting

Delivered timely insights for executive decision-making.

The FP&A team's role in automation made these transformations possible.



07 **FACT SLIDE**

INDUSTRY INSIGHT

Companies adopting CPM/EPM systems experience a 15% increase in forecast reliability and a 10% reduction in financial planning errors. Gartner case studies highlight how FP&A teams drive these results.



08 **CHOOSING THE RIGHT SOFTWARE**

When selecting FP&A software, consider:

Vendor Support

Ensures reliable customer service.

Customization Options

Tailors solutions to FP&A needs.



Implementation Partner Role

Experienced consulting firms ensure successful adoption.

AI Capabilities

Supports predictive analytics and scenario planning.

Security Features

Protects sensitive financial data.

Cost-effectiveness

Balances value and ROI.

Collaborate with the implementation company to align technology with organizational goals. Gartner's case studies emphasize the importance of this partnership.



09 *CURIOSITY SLIDE*

Want to see more real-world success stories driven by FP&A?
Stay tuned!



10 **CASE STUDY - ENHANCING COMPLIANCE AND REPORTING**

CASE STUDY: MEDIA CONGLOMERATE

A media conglomerate streamlined compliance and reporting with CPM/EPM. The FP&A team ensured:

Automated Compliance

Achieved **100%** regulatory adherence.

Faster Reporting

Reduced reporting time by **30%**.





Data Accuracy

Improved accuracy by **25%**, guided by FP&A oversight.

Cross-Department Integration

Enhanced collaboration through FP&A's facilitation.

FP&A teams played a critical role in integrating technology and ensuring organizational adoption.



11 **FACT SLIDE**

QUICK FACT

Organizations implementing CPM/EPM systems see a 20% reduction in operational costs and a **30%** improvement in data accuracy. FP&A teams' strategic role is highlighted in Gartner's findings.



12 **RECAP SLIDE**

RECAP: WHY AUTOMATE BUDGETING & FORECASTING?

Increased Efficiency

Streamlines processes for FP&A professionals.

Enhanced Accuracy

Reduces human errors significantly.

Real-time Insights

Provides up-to-date data consistently.





Scenario Analysis

Enables FP&A-led evaluations of multiple scenarios.

Strategic Planning

Aligns business strategies seamlessly.

Integration Capabilities

Connects with existing systems.

AI Capabilities

Supports predictions and scenario planning.





Scalability

Grows with your business needs.



Collaborative Tools

Enhances teamwork and communication.

With automation, FP&A teams drive efficiency, accuracy, and strategic growth, ensuring organizations stay competitive.

Ready to transform your FP&A processes with automation? Partner with the right implementation team and software to elevate your financial strategy!



DID YOU LIKE IT?

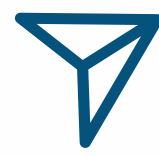
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