

Connecting operations with strategy, financial planning, and analysis



Unit4 FP&A – Why integrate with ERP?

Organizations are continually looking for a more consistent approach to financial planning and analysis, as shaping the future whilst navigating change becomes increasingly complex.

A suite-based consolidated Enterprise Reporting Platform (ERP) & Financial Planning & Analysis (FP&A) offering with cloud capabilities can help with this by better aligning core operational data with finance and strategy.

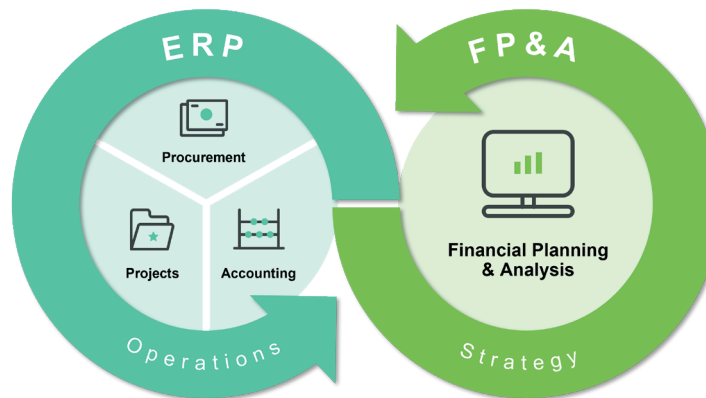
Operational processes and planning can often be disconnected with wider strategic ambitions. Given this, unifying an organization's operational ERP and financial data flows and systems can help ensure:

- Operational plans are directly linked to strategic drivers
- An understanding of today to prepare for tomorrow
- A single trusted source of truth for strategic planning linked to operational data

What is ERP and FP&A?

ERP is generally more operational in nature focused on the day-to-day of an organization. Sales orders, reconciliations, procurement, invoicing, timesheets, and people data can be stored within what is often a static record of processes and transactions. The functional scope of ERP is generally to have a retrospective static view and is structured with independent tools for different departments and functions.

FP&A is a more strategic and visionary decision-support solution focused on areas such as: strategic planning, revenue planning, financial reporting, budget creation, forecasting, and data analytics.

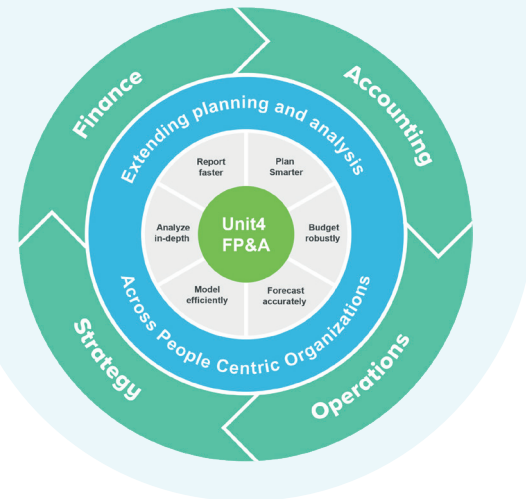


The benefits of an integrated approach

- Improve visibility and decision making with a single source of trusted data
- Reduce risk with less human errors through more automated processes and reporting
- Enhance productivity by standardizing on best practice and reducing low value manual tasks
- Lower operational costs by unifying processes and integrating systems
- Optional scalability using standard architecture as your organization evolves

“ Unit4’s benefit-to-cost ratio is 30% higher than the total ERP market across service and asset centric industries ”

Nucleus Research



Planning, budgeting, and forecasting becomes much simpler with unified systems and data. The longer-term direction and objectives can be modelled with more confidence. Allocation of resources and monitoring expenses more simplified, whilst ongoing recent performance can be easier linked to projections and plans.

The value

- **90%** average monthly reporting time saving
- **2 years** average payback period
- **50%** reduction of IT staffing for system and data maintenance

Unit4 ERP

- A common data model for fast and easy access to accurate data for better insights and decision-making

- Cloud based microservices platform for added agility, flexibility and resilience
- Integrated apps for improved visibility of project management and control of finances

Unit4 FP&A

- Advanced forecasting capabilities
- Self-service dashboarding
- Optimize business planning with out-of-the-box best practice

Understand trends, identify opportunities, and navigate change

Strong business dependencies exist between FP&A (strategic) and ERP (transactional). Combining both better supports daily work around reporting,

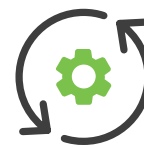
analysis and forecasting cross-functionally with increased collaboration.

Unit4 helps elevate your ERP from a pure transactional to more strategic tool. This becomes increasingly important given FP&A is being increasingly used to automate and manage planning processes in disciplines beyond just finance.



Collaborate

Strengthen partnerships across your organizational functions



Optimize

Unify data, reduce risk and simplify processes



Navigate

Respond with agility to model uncertain market and industry conditions