



DIGITAL SERVICES



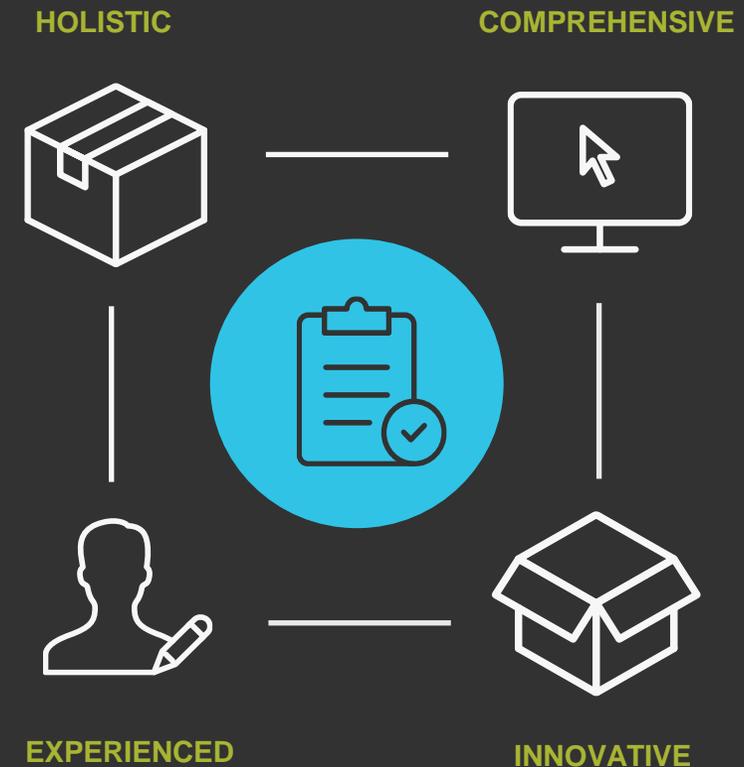
Microsoft Power BI Smart Insights



Value Proposition

WHY CITRIN COOPERMAN?

- Holistic approach to improving your business – providing new perspectives on long- and short-term strategies
- Comprehensive professional services firm with practices designed to serve every one of your business needs
- Experienced professionals driven by focused industry verticals
- Finding innovative solutions drives our professionals and helps you succeed



DIGITAL
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Value Proposition

WHY DIGITAL SERVICES?

- Full-service approach to your digital landscape
- Experience applied across multiple platforms, industries, and geographies, to build out the roadmap that fits your needs
- Resources across multiple disciplines coordinated to optimize outputs from multiple perspectives
- Professional project management
- “Digital Service Works” proven project methodology
- Tools built for all stages of digital transformation
- Targeted vertical focus produces a deeper understanding of the nuances of your industry

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Microsoft Power BI

Target Circumstances

WHY IS THIS NEEDED?

Users reverting to Excel

- ERP reporting falling short / is not user friendly
- Sensitive data moving in and out of Excel is a security concern
- Clear audit trails not established
- Gaps in user permissions allowing access to sensitive data

Advanced reporting needs

- Deeper analyses of company statistics
 - Multiple reports required
 - Manually refreshed
 - Manually reconciled across reports
- Data modeling for scenario analysis with multiple what-if statements is conducted manually with complex spreadsheets

**Many ERPs require the purchase of an additional SKU for limited budgeting functionality.*





Target Circumstances

WHY IS THIS NEEDED?

Increasing data management complexity

- Volume of data
 - More ERP reports forced to be ran overnight or during non-working hours due to run time
 - Report generation slows down entire system
- Time spent analyzing data is suffering due to the time spent on data collection, aggregation, and verification

More...

- Investors are requiring deeper reporting needs with various views
- Additional platforms slated to be added to the technology stack
- Company is in acquisition mode



What is the Problem?

WHY NOW?

- “I need my data assembled in one place and presented in a way to drive quick and accurate decision making.”
- “By the time I have the data, it is too late to react. I need real-time reporting and faster month-ends.”
- “My team needs better dashboards fueled by data from multiple sources.”
- “Excel, by itself, has taken us this far, but now that I have more employees, departments, and locations I need something better.”



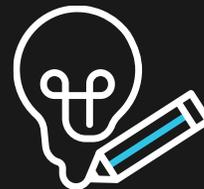
Microsoft Power BI Smart Insights

Power Packs



UNLEASH CREATIVITY

Harness Power BI's templates so you never have to start from scratch



UNLOCK PRODUCTIVITY

Let Power BI summarize data for you and answer questions using natural language to optimize your time



UPLEVEL SKILLS

Be better at what you're good at and master what you've yet to learn





Microsoft Power BI Smart Insights

WHY MICROSOFT POWER BI

- 360-degree view of your business
- Visual storytelling
- Enhance and simplify collaboration across solutions and data sources
- Meet employees in their flow of work with tools specifically tailored for businesses with pre-built power packs fueled by leading insights for your industry
- Real-time data with on-demand, scheduled, and event triggered refresh options
- Simplified distribution throughout your organization
- Generate, notify, and distribute reports automatically with Power Automate
- Maintain a secure environment while extending technology further than ever





Microsoft Power BI

THE VALUE OF POWER PACK



Grounded in business data, Power BI Smart Insights is designed to help organizations unleash creativity, unlock productivity, and level up skills.

TRACK INDUSTRY-SPECIFIC LEADING MEASURES

- Use the pre-built power packs to analyze your data in ways that keeps you at the forefront of your industry.

ACCELERATE OUTCOMES

- Refresh options and real-time connections to data source(s) drive data-based actions faster.
- Accurate scenario analyses identifies the right strategy based on internal and external conditions.

INCREASED SPEED TO VALUE

- Launch established templated reports and dashboards.
- Never lose the ability to adjust your reports and dashboards.

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Microsoft Power BI LICENSE PRICING



COMMERCIAL PRICING

\$9.99 / per user / per month

(annual term only)



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Microsoft Power BI Smart Insights

POWER PACKS

Sales Power Pack

- Power Pack licensing \$5k (1st year only)
- Services \$15k* (1st year only)
- Sales dashboard
- Pre-built sales reports

Purchasing Power Pack

- Power pack licensing \$5k (1st year only)
- Services \$15k* (1st year only)
- Based on sales dashboard configuration
- Pre-built purchasing reports

Advanced Purchasing

- Power Pack licensing \$10k** (1st year only)
- Services \$30k*|** (1st year only)
- Purchasing Pack plus predictive purchase recommendations based on outstanding PO's and on hand inventory.

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**Starting price. Total services required varies based on complexity.*

***Includes both the Purchasing Power Pack and Advanced Purchasing.*





Sales Power Pack

SAMPLE DRILL DOWN NAVIGATION (CLICK ON VIDEO BELOW)

MI8AR All Data is Fictional & for Demo Purposes

Extend Dates Reset Dates Search Search

Range Date Range 1/1/2023 3/31/2023

Sales Rep Name Territory Customer Na... Item Class Style Brand Item

All All All All All All All

Viewing Dates - Current Period: 1/1/2023-3/31/2023 & Previous Period: 1/1/2022-3/31/2022

Sales			3 Period			Margin			Contribution		
Customer Name	Curr. Sales	Prev. Sales	Diff - Sales	Curr. Cases	Prev. Cases	Diff - Cases					
Store #25	\$73,007		\$73,007	2,379		2,379					
Store #36	\$70,721		\$70,721	2,532		2,532					
Store #7	\$70,334		\$70,334	2,291		2,291					
Store #12	\$68,071		\$68,071	2,511		2,511					
Store #14	\$67,862		\$67,862	2,315		2,315					
Store #34	\$65,225		\$65,225	2,112		2,112					
Store #20	\$64,973		\$64,973	2,196		2,196					
Store #23	\$64,429		\$64,429	2,120		2,120					
Store #1	\$63,160		\$63,160	2,106		2,106					
Total	\$2,192,991		\$2,192,991	74,326		74,326					

Item	Curr. Sales	Prev. Sales	Diff - Sales	Curr. Cases	Prev. Cases	Diff - Cases
14 Water Balloon Fight Club	\$105,434		\$105,434	3,595		3,595
12 Space Cream	\$104,556		\$104,556	3,337		3,337
1 All Citra Everything	\$103,752		\$103,752	3,433		3,433
15 Old Monte Carlo	\$98,192		\$98,192	3,171		3,171
21 Crusher	\$98,172		\$98,172	3,000		3,000
24 Skadoosh	\$95,986		\$95,986	3,161		3,161
13 Foggy Window	\$95,875		\$95,875	3,373		3,373
Total	\$2,192,991		\$2,192,991	74,326		74,326

36 Month Report Velocity Report

\$2.19M

Current Sales

(Blank)

Previous Sales

Infinity

Diff - Sales

74.33K

Current Cases

(Blank)

Previous Cases

Infinity

Diff - Cases

73.12%

Current GP %

(Blank)

Previous GP%

YOY Monthly Comp - Sales

● Sales Growth (\$) ● Current Sales ● Previous Sales

Sales Cases Pounds

Sales Growth (\$)

2023 January 2023 February 2023 March

DIGITAL SERVICES



Why add Power BI?

LEADERSHIP: WHAT'S IN IT FOR ME (WIIFM)?

- Technology becomes a competitive advantage that reduces the pressure to add staff. We will realize benefits without adding staff through greater productivity.
- Access to on-demand data that is accurate and comprehensive to make decisions.
- Easy to read dashboards that are intuitive to use.
- It has a high speed to value.
- Assembling and disseminating reports to investors and other outside groups is simplified and delivered with confidence. It is easy to tell the story of our performance.
- Prepares the organization for the future through growth, expansion, and evolution.



Why add Power BI?

MANAGEMENT: WHAT'S IN IT FOR ME (WIIFM)?

- Technology becomes a competitive advantage that reduces the pressure to add staff. We will realize benefits without adding staff through greater productivity.
- Access to real-time data that is accurate and comprehensive to make decisions.
- Easy to read dashboards that are intuitive to use.
- It has a high speed to value.
- Decreasing, potentially eliminating, the need to create reports for leadership through automation.
- Leadership always has a clear picture of the status of the organization reducing inquiries and research that has to be completed to meet their needs freeing up time for my staff.



Why add Power BI?

CC SALES TEAM: WHAT'S IN IT FOR ME (WIIFM)?

- Gives users what they really want when it comes to reporting. Great addition to the post go-live conversation or the future mapping conversations.
- Automation and other time savings directly impact client's bottom line freeing up capital for more technology investment. This means more revenue and quota relief for you.
- Adding another Microsoft product elevates the entire tech stack.
- Great reason to continue the conversation because there are potential services each time your client's business grows or changes.
- Any change in leadership usually means that reporting is going to need to change a bit.



Questions?



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Thank You

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