

Planful | Superpower Slide



Key Contact:	• Kyle Van Jahnke – VP Global Partnerships • Pamela Taff – Dir. Tech Alliances • Annette Dehler – VP Marketing	We are the Pioneers of cloud financial planning & consolidations. We empower finance leaders with a cloud-based FP&A and consolidations solution that drives confident and impactful decision-making, inspires financial collaboration, and powers agility through accelerated planning cycles.									
PDM: PMA:	PDM: Troy Simpson PDM: Heimir Fannar (Global Sponsor) PMA: Amanda Klein	Position If • Company is struggling planning and analyzing their performance • They spend a lot of time consolidating and reporting on performance • They have trouble aggregating & reporting results • Their business plans in silos and cannot assess drivers impact on the total business	Solutions Planful aligns with the following solutions: Financial Planning: • Quarterly/Monthly budgeting & forecasting • Rolling forecasts • Cash flow modelling • Workforce planning • Annual planning • Scenario Planning • Long Range Planning Financial Consolidations • Consolidations • Financial Reporting • Management Reporting Operational Plan • S&OP • Project Resource Planning • Demand Planning	Industry Focus Areas <table><tr><td>Manufacturing</td><td rowspan="5">Media & Communications</td><td rowspan="5">Government</td></tr><tr><td>Life Sciences</td></tr><tr><td>CPG</td></tr><tr><td>Technology</td></tr><tr><td>Retail</td></tr></table> Common ← ————— → Uncommon	Manufacturing	Media & Communications	Government	Life Sciences	CPG	Technology	Retail
Manufacturing	Media & Communications	Government									
Life Sciences											
CPG											
Technology											
Retail											
Number of Employees	• 350										
Industry Focus	• All industries										
Locations	• Redwood City, CA.										
Regional Coverage	• EMEA, NA										
Engaged Districts	• US- East, Central, West • CA - East, Central, West • UK, Australia, South Africa, LATAM										
Sales Plays	• Modern Workforce: Security • Business Applications: all plays • Data and AI: Analytics and AI										
Partner Offers	Planful Continuous Planning for Microsoft D365 F&O and Business Central										
		Customer Case Study: Planar Business Problem • Consolidating books with 3 different chart of accounts, currencies, and zero control. Solution • Streamlined Consolidation and Reporting process into Planful maintaining independence at acquired companies Outcome • Transparency in their data allowed them to double revenue and keep expenses flat	Customer Case Study: LT Appeal Business Problem • Planning & reporting process had outgrown manual solution that could scale with their dynamically changing environment. • Current process did not have auditability and was highly error prone. Solution • Enhanced planning and reporting process by utilizing Planful for planning, budgeting and reporting across the enterprise Outcome • 8 hour reporting process now takes 5 minutes • Now use over 2 years of data to recognize trends and analyze their business								
		Best way to Engage By Territory • Team Call/List Share • Co-sell Days/Account Mapping • Send "Three Questions" Exec Intro Email • Joint Presentations/Demos/POCs	By Scenario • Rapidly Adapt and Automate Business Processes • Run Adaptive Business Operations • Stay Connected with Customers • Enable Secure Remote Work	By Workload • Dynamics 365 F&O: Budgeting; Financial Planning; Cash flow planning; Project planning; Asset management; Inventory management; Warehouse management; workforce Planning							

