

# budgeting & planning

## BUSINESS BENEFITS:

Transform your budgeting processes into strategic activities with Axiom EPM.

### A Single, Trusted Data Source.

Integrate data from any source system for use in planning, reporting and analytics activities.

### Owned by Finance, Not IT.

Embrace and extend familiar Microsoft Excel for developing business rules and report design - no complex scripting of business rules required.

### An Extensible Planning Platform

Not a hard-wired solution, allowing users to easily tailor modeling views by division or line-of-business.

### Responsive to Your Needs.

Unlike other solutions dependent on IT for scripting business logic and designing reports, Axiom EPM empowers Finance to own and manage change to the application.

### Improves Accuracy and Buy-in.

Sophisticated modeling and transparent logic improves ownership and accountability over resulting plans.

### Easy to Deploy.

An intuitive user-interface that can be deployed over the web.

### Lowest Total Cost of Ownership (TCO).

Empowering Finance to own and manage the application means you don't need specialized IT staff or consultants to deploy.

### Superior Customer Service.

Demonstrated "Excellence" in customer surveys arising from highly personalized support provided by knowledgeable and professional experts

## BUDGETING | FORECASTING | REPORTING & ANALYSIS

In order to react and address ever changing business realities, organizations must be able to quickly model and adapt financial plans. Yet, Finance's ability to execute on the task quickly and with precision is often hindered by inadequate planning capabilities. The tools used for planning may be inept in financial modeling, too rigid or complex to maintain or not effectively engage the participation of users.

With Axiom EPM, budgeting and forecasting truly becomes a collaborative process that delivers timely and accurate results that management can trust. Architected with financial professionals in mind, it provides the sophistication and control required to be highly responsive to changing business needs. The ability to structure a planning model that emulates your business utilizing the right drivers modeling their impact upon financials is well supported. Financials are outcomes not inputs; Axiom EPM incorporates the right operational and market data necessary to model financial outcomes vs. inputting them into a grid.

### Streamline the Planning Processes

Planning cycles are long and labor intensive for many organizations. To shorten the cycle and minimize the organizational burden, Axiom EPM provides built-in workflow capabilities. These enable distributed planning processes that are highly automated and centrally-controlled for even the largest user communities. Email alerts and real time status updates give administrators visibility to what's going on. Business users can personalize the system based on their preference accessing the system anytime, anywhere – over the web, or offline. Submissions are consolidated in real time available for review along any hierarchy or rollup. Through automation such as plan distribution and collection, the finance team and others can spend more time on higher value add activities such a scenario modeling and financial analysis.

### Built for Finance

While most enterprise performance management technologies look to replace Excel, the end result is typically either too technical to manage or too simplistic to be effective. Axiom EPM embraces Microsoft Excel in a unique and innovative manner, using it for the creation of business rules and models yet leveraging supporting back-end technology to provide the robust feature set and performance capacity required of an enterprise application. Our approach empowers Finance professionals to utilize their existing skills in a way that's scalable and tamper proof – something stand-alone spreadsheets could never do. The result is a robust planning platform that is transparent, easy to manage and enterprise grade.

## FEATURES:

### System Administration

**Built-in ETL Capabilities.** Easily configure and automate data imports from source data tables.

**Roles Based Security.** Grant users access and permissions based on defined roles.

**Scheduler Services.** Automate and streamline data import and planning and reporting processes.

### Budgeting

**Configurable, Excel-Based Models.** Business logic and modeling templates are designed in Excel.

**Centralized Planning Assumptions.** Update business variables that automatically flows through financial plans.

**Drill from Plans to Reports.** As an integrated platform, users can drill between budgets and detailed reports.

**Flexible Workflow.** Define workflows that automate the review and approval process.

**Dynamic 'What-if' Modeling.** Simulate the impact of various business scenarios, maintain multiple versions.

### Reporting

**Drag & Drop Report Design.** Create reports using "drag & drop" functionality in a Microsoft front-end.

**Drill-down and Drill-thru Capabilities.** Dynamic drill from consolidated results to underlying details.

**Report Distribution & Publishing.** Online access or scheduled distribution of report books.

### All Forms of Planning

Axiom EPM supports all forms of planning such as, financial and operational budgeting, rolling forecasts, staff planning, capital budgeting, sales planning etc. It is not unusual for customers to import several distinct data sources into the system in support of their planning needs. Axiom's unique structure allows for an organization to plan at a detailed level (e.g. employee, sub-general ledger account, SKU) or at an aggregated level (e.g. summary accounts, summary organizations) – you decide. It supports both top-down and bottom-up planning metaphors or a combination therein. It allows for the melding of financial and non-financial data together into a single template which often has high benefit to users. Different template types can be created and propagated to perhaps thousands of departments or planning entities without manual intervention. Business logic used for driver-based models, payroll calculations, spreading methodologies etc. are easily created and stored in the system's calculation library without the use of scripting.

### Deliver Insightful Management Reporting

Financial and managerial reporting delivered with Axiom EPM enables organizations to transform enterprise data into insightful information accessible to broad user communities. The platform supports a breadth of reporting needs from departmental variance analysis to board packages and everything in between. It enables report publishing and distribution as well as a self-serve model where users can slice and dice through information based on their security profile. Reporting with Axiom EPM empowers non-technical finance personnel to design and distribute the exact reports styles they desire including trending, financial statements, variance analysis, ranking, waterfall analysis, root-cause analysis, fishbone decompositions, scorecards and ad hoc inquiry.

---

### Axiom EPM application offerings include:

- Budgeting
- Reporting
- Forecasting
- Capital Planning
- Strategic Planning
- Scorecards
- Dashboards

---

### Axiom EPM corporate office

10260 SW Greenburg Rd., Suite 710

Portland, OR 97223

toll free: 877.691.9969

fax: 503.961.1176

**sales:** 503.977.0234 x115

**email:** info@axiomepm.com

**www.axiomepm.com**

