



Business Planning Survey

Time



Challenges



Tools

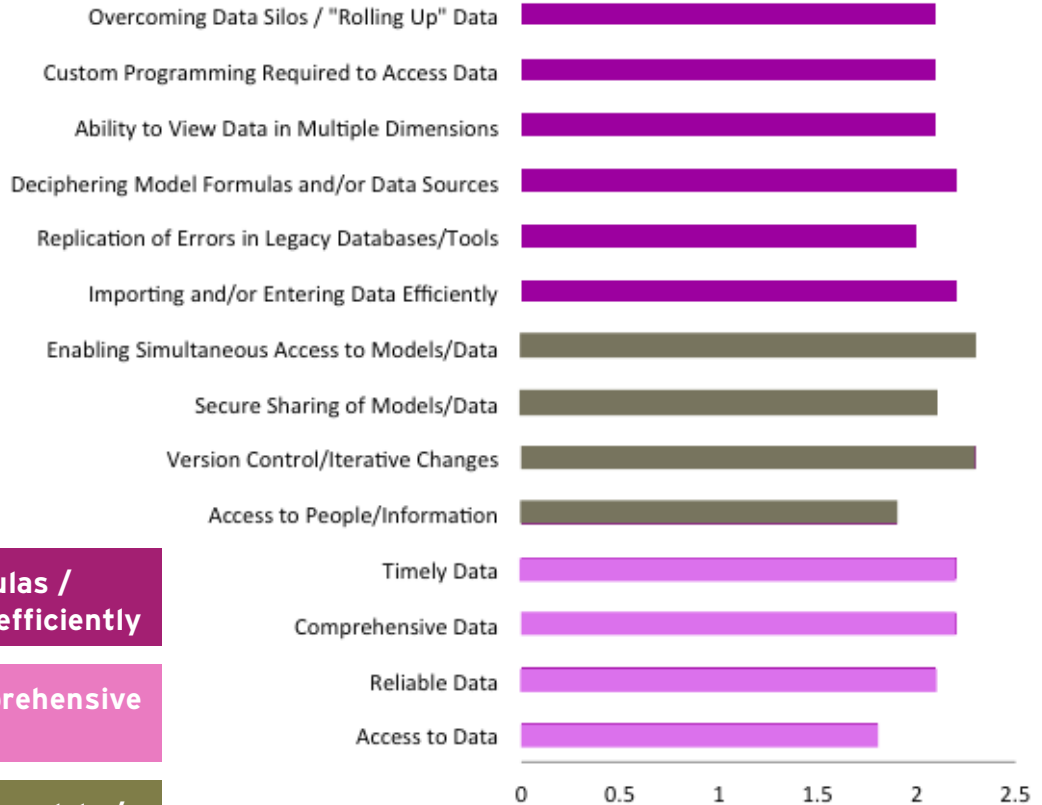


What are the everyday challenges that business and finance professionals face? Quantrix asked its customers, and found a long list of technical, information, and collaboration challenges. Many rise just above the nuisance level, while others pose serious challenges to daily work.

Technical Challenges

Collaboration Challenges

Information Challenges



1 = not very challenging / 2 = moderately challenging / 3 = very challenging

Top Challenges

- Deciphering model formulas / Getting data into model efficiently**
- Getting timely and comprehensive data**
- Simultaneous access to models / Version control**

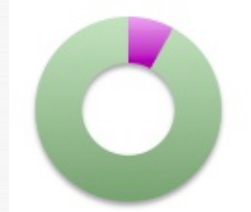


Business and finance professionals say that cloud-based tools can improve collaboration in data gathering, business modeling, and model sharing / reporting ... but there is no widespread adoption of the cloud as of yet.

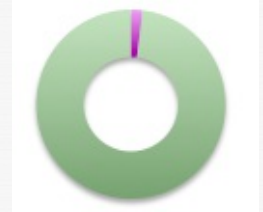
22% Use Cloud-Based Budgeting / Planning Tools



8% Use Cloud-Based Multidimensional Modeling Tools



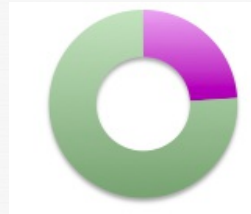
2% Use Cloud-Based Spreadsheets



25% Use Cloud-Based ERP Budgeting Module



24% Use Cloud-Based Business Intelligence Tools



41%
Companies with a strategic initiative to move business applications to the cloud.



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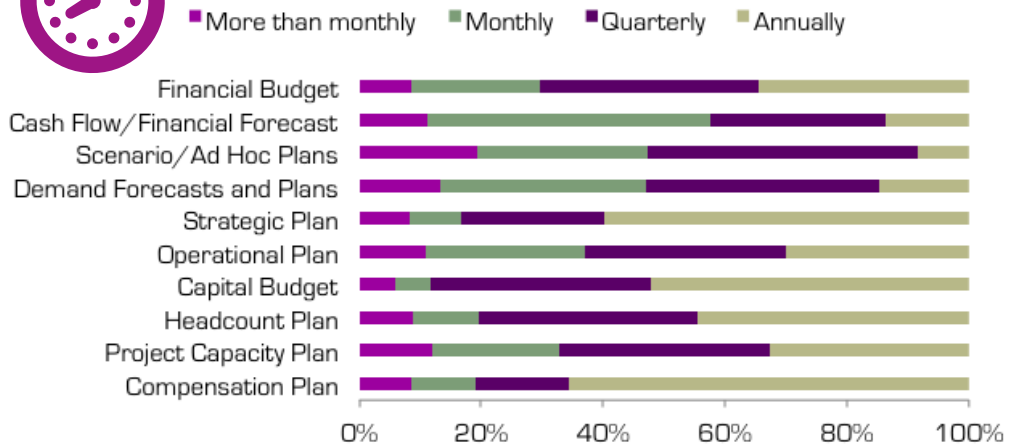
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What Business and Finance Professionals Do All Day

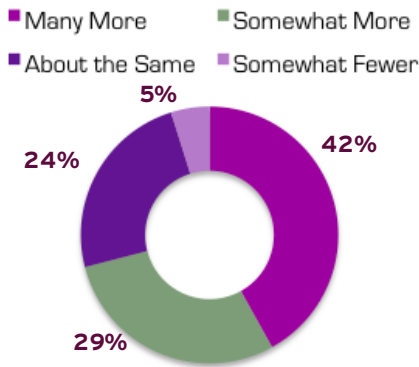
How do business and finance professionals spend their day? Quantrix asked its customers, and found they generate lots of plans, forecasts, and budgets. Ad-hoc scenarios, cash flow forecasts, and demand forecasts top the list for frequency, often requiring updates on a monthly or greater basis.



How often do you update the following reports?



Requests for Ad-Hoc Scenarios



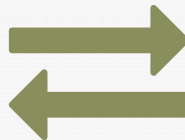
The pressure shows no signs of easing up: Business and finance pros report the number of requests for ad-hoc/"what-if" scenarios is increasing dramatically.

42%

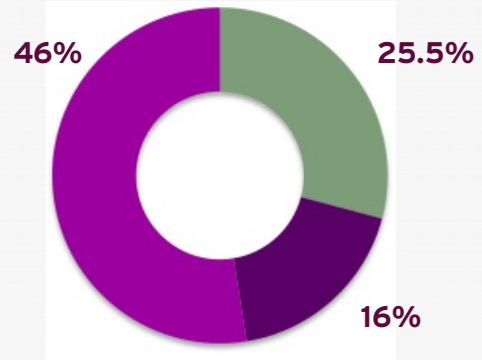
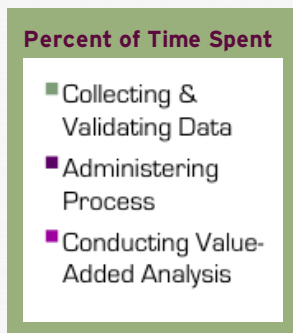
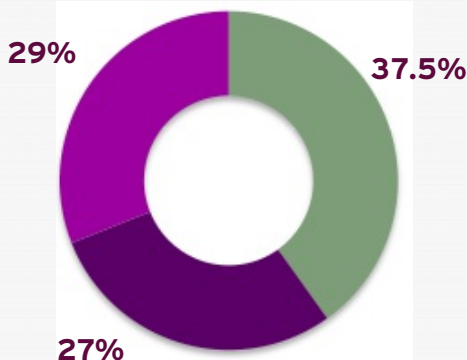
Number reporting that they are receiving "many more" requests for ad-hoc scenarios than in years past.

Business and finance pros are spending too much of their time on rote tasks like collecting data and administering processes. What do they think they should be focused on? Conducting the value-added analysis their companies need to make business decisions.

Where do you spend your time today?



Where should you spend your time?



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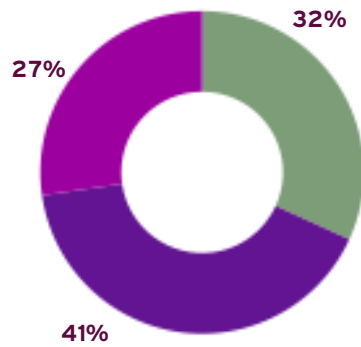
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Are business and finance professionals creating integrated business plans? And what tools do they use to create the various elements: business plans, forecasts, and budgets? Quantrix asked its customers, and found they use a variety of tools, and can recommend improvements for them all.

Have You Linked Elements to Create an Integrated Business Plan?

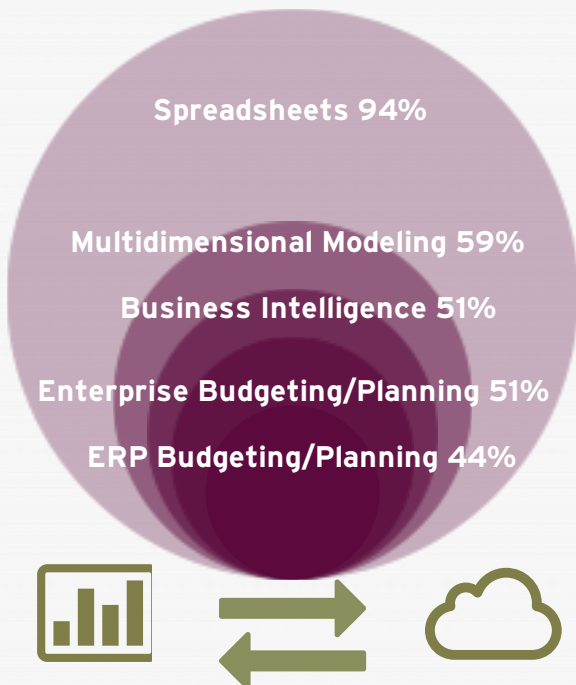


Linking together plans, forecasts, and budgets into an integrated business plan (IBP) helps business professionals evaluate options, uncover risks, and discover opportunities. 32% say they have fully integrated IBPs, 41% report partial integration, and 27% have not integrated their business planning elements.

- Compensation Plan
- Project Capacity Plan
- Headcount Plan
- Capital Budget
- Operational Plan
- Strategic Plan
- Demand Forecasts and Plans
- Scenario/Ad Hoc Plans
- Cash Flow/Financial Forecast
- Financial Budget

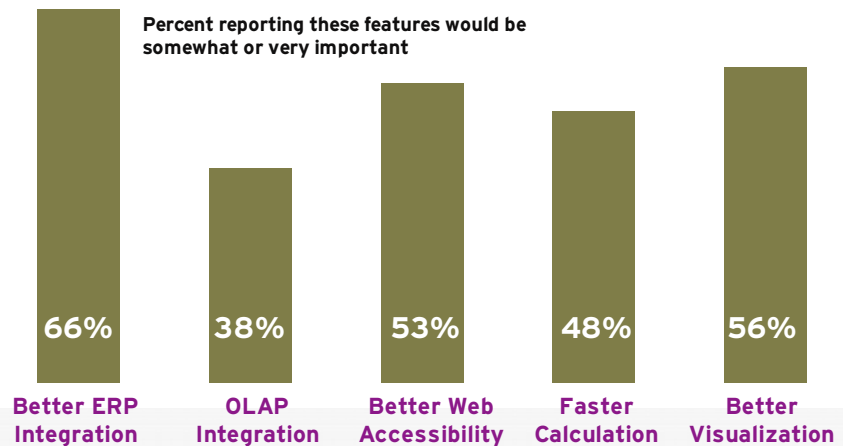
■ Fully Integrated ■ Partially Integrated ■ Not Integrated

What Tools do You Use?

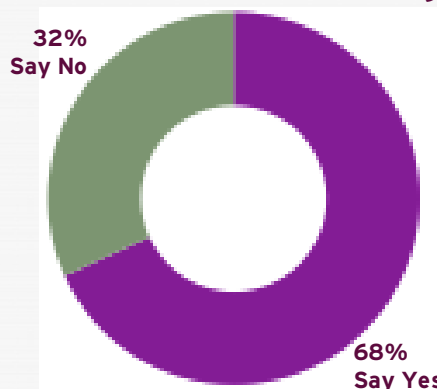


Spreadsheets remain the most-used tool by business and finance professionals to create business plans, forecasts, and budgets, with 94% of respondents using them in their daily work. Yet only 2% use cloud-based versions. 22% use cloud-based budgeting/planning tools, 24% use cloud-based business intelligence tools, and 25% use cloud-based ERP budgeting modules.

What Would Make Your Tools Better?



Do You Use ERP Data to Build Business Planning Models?



68%
Companies who use data from ERP to build models



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