



How to Choose the *Right* Corporate Performance Management (CPM) Solution for Your Clients

Meeting of the Minds
2/29/2024


Budgeting | Forecasting | Consolidation | Analysis

Presenter

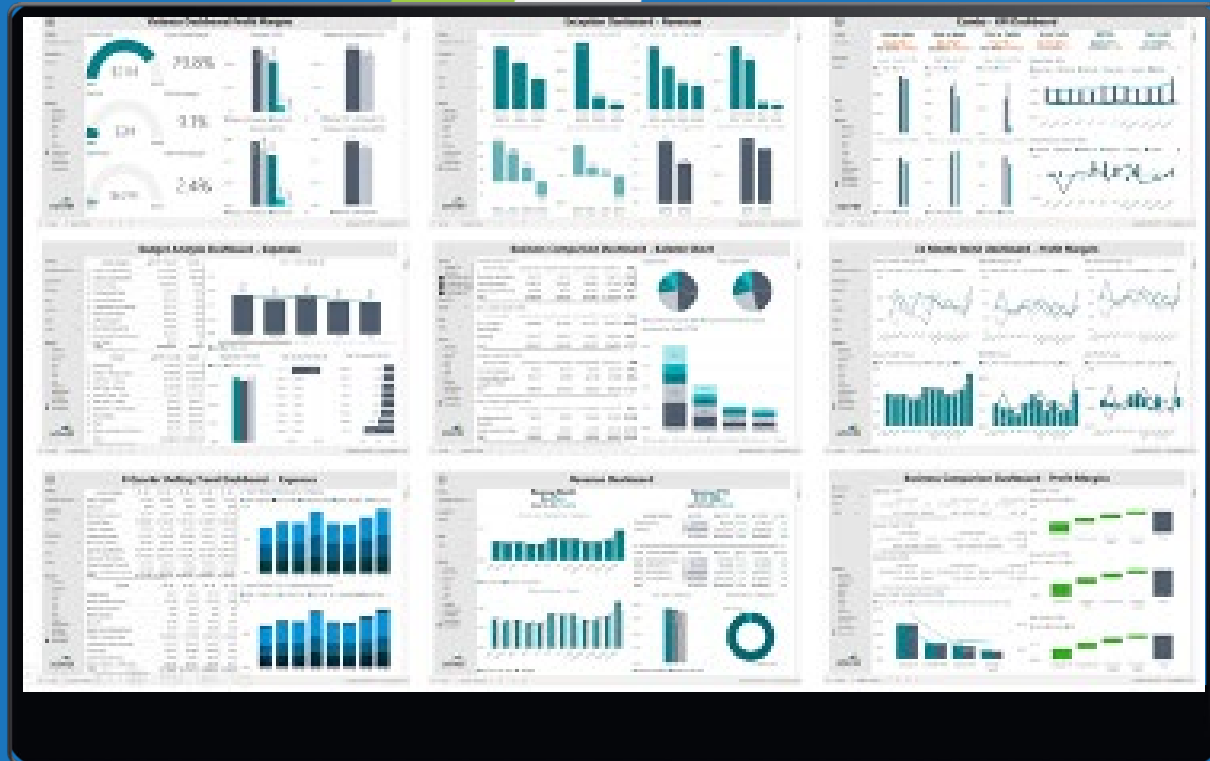


Beth Harvey

Partner Development
Manager

A blurred background image of a business meeting. A person's hand is pointing at a document with a line graph, while another person's hand holds a pen over the same document. The scene is overlaid with a large blue diagonal shape on the right side.

Choosing the Right CPM Provider



**Help Clients
Become Data-Driven
Organizations with
Solver**

Thriving Businesses Need:



Easy Access:
to Data across the
organization



Speed to Market:
the RIGHT
information at the
right time



Efficiency:
The right KPIs for the
right people with
streamlined
processes and
accountability

Why CPM?

- No single source of truth, slow decision making and inadequate visibility
- Burdensome manual process which are prone to error
- Heavy reliance on Excel for budgeting forecasting, lack of real time updates

63%

of CFOs ranked FP&A as the top priority for improvement

73%

of CFOs pull data together manually and run forecasts and scenarios offline

68%

of companies spent more time on data prep than analysis

Reporting and Budgeting Red Flags

- Troubles with collecting and consolidating spreadsheets
- Broken links
- Poor reporting
- Lack of user security
- Versioning Issues
- Budget statuses (submitted, approved, rejected, etc.)
- No modeling, forecasting or “what if” scenarios

What to Look for
with your Clients

The Spreadsheet Juggler



Planning Challenges

Spreadsheet Budgeting & Forecasting

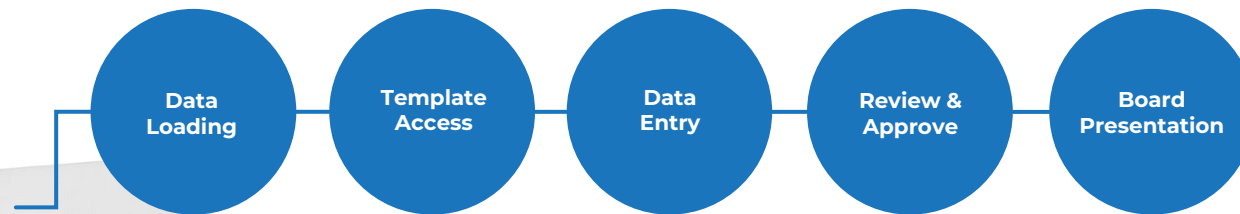
- Manual data loading
- Manual spreadsheets
- Manual template distribution
- Manual workflow
- Manual comments & line items
- Manual forecasting & modeling

Solver to the Rescue

Cloud-based Budgeting & Forecasting

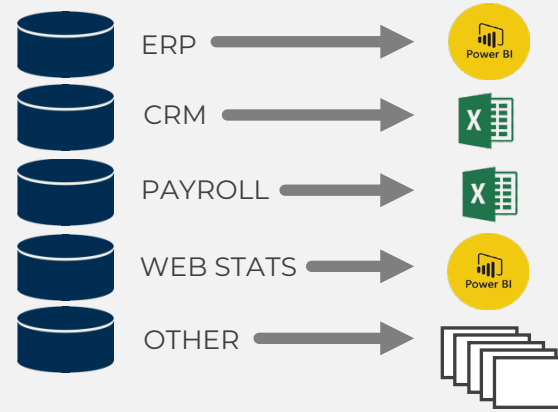
- Data integration
- Parameter-driven models
- Web-based data entry
- Budget workflow
- Built-in comments & line items
- Dynamic forecasting & modeling

The Decision Optimizer





“Analysis Paralysis”



Analysis Challenges

Typical Analysis Situation

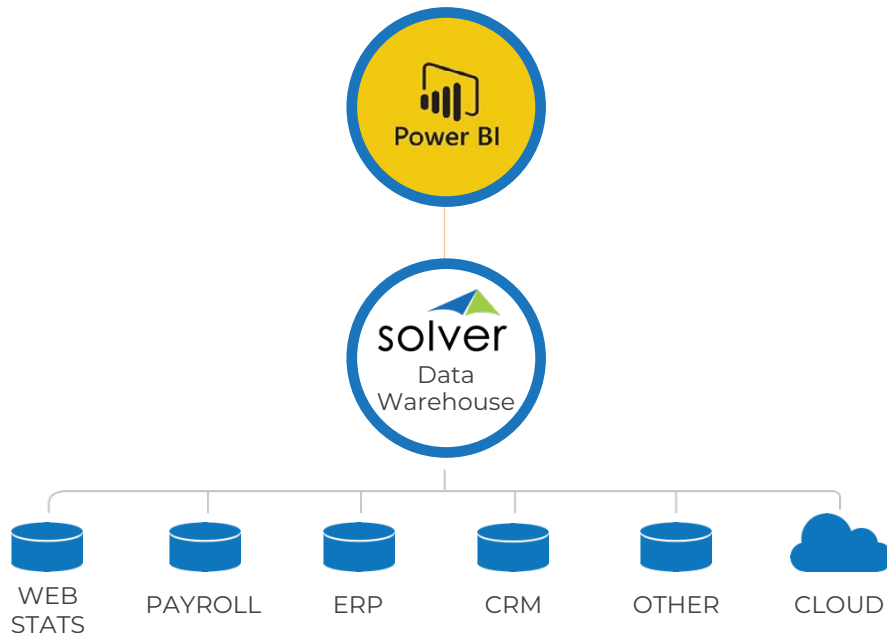
- **LACK** of single visualization BI tool
- **LACK** of unified database for BI
- **LACK** of time for analysis

Solver to the Rescue

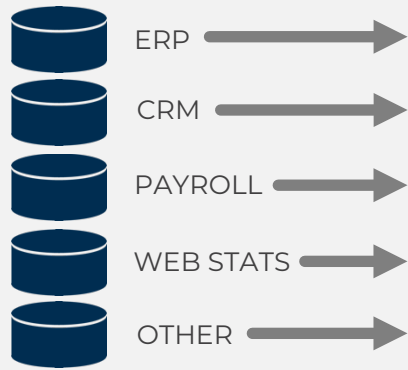
Cloud-based Analysis

- **ONE** visualization tool (Power BI)
- **ONE** integration (Power BI connector)
- **ONE** experience (Solver with linked PBI)

The Analysis Hero



The Overloaded Manager

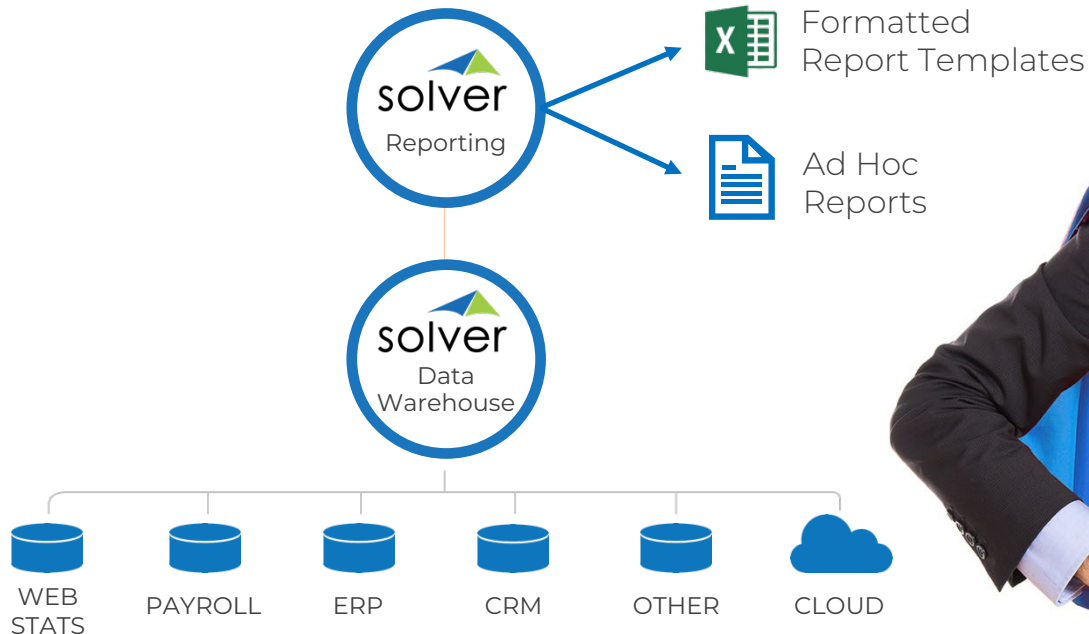


Reporting Challenges

Typical Reporting Situation

- **MANY** data sources
- **MANY** reporting tools
- **MANY** Excel models

The Reporting Hero



Solver to the Rescue

Cloud-based Reporting & Consolidations

- **ONE** database (DW)
- **ONE** reporting tool
- **ONE** user interface (portal)

Ideal Customer Profile

- SMB, Mid-market
- >100 Employees
- Revenue range: \$10M - \$1B
- Need to combine ERP and other data for reporting and planning (POS, membership, payroll, etc.)
- Multi-company consolidation requirements
- Budgeting and forecasting requirements
- Advanced planning requirements
- Data migration from legacy ERP
- Industry focus: nonprofit, healthcare, services, distribution, construction, retail and horizontal

When to Introduce Solver vs Other Solutions

- Solver pulls data from other sources besides ERP
- Solver has advanced security to control who sees what data down to report and cell level
- Solver automates workflows to control and oversee the entire budgeting process
- Solver handles complex driver-based budgeting (non-GL sources) and advanced forecasting models
- Solver can handle very large datasets in the data warehouse where excel only can slow down
- Power BI and Tableau are the Data Visualization tools for Solver and have a native API to both
- Solver comes with over 100 pre-built reports and dashboards out of the box

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Why Solver

About Solver

- Founded in 1996
- Headquartered in California, with 15 offices globally
- One of the first CPM solutions to offer a web portal globally
- Specialize in multiple verticals, including SaaS, Non-Profits, Hospitality, and Healthcare
- Experienced team with deep expertise on CPM and Business Intelligence
- Recognized as a G2 Leader in Corporate Performance Management
- SOC 2 and HIPAA Certified/Compliant
- Partnered with top global software publishers and business consulting firms



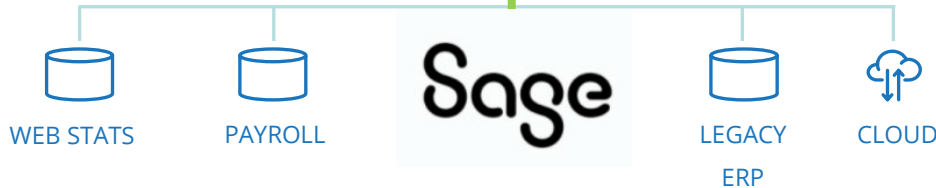
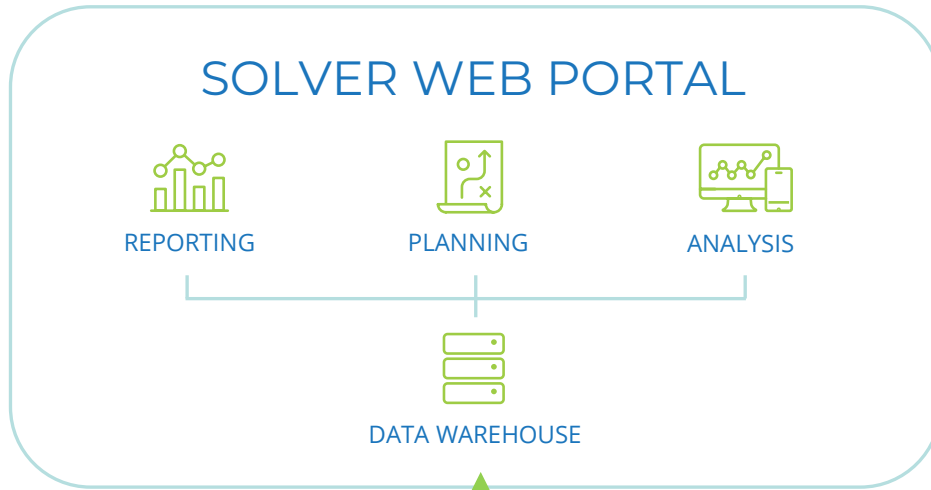


CEO

CFO

COO

CMO



Download & Share Templates

Shop the Template Marketplace

Template Marketplace

Faster, Better Decisions

Plug-and-Play reports, budgeting and forecasting models, and dashboards

P&L Act YTD, Budget Rest of Year

Entity: CRONUS&INC - CRONUS USA, Inc.
June 30, 2020

Projected revenue for this year is trending to be \$147,812 versus Last Year of \$2 which will be an increase of -, and the net profit will be \$18,594, which will be an increase of -.

Account No.	Description	2019		2020		CR (plan-bud) vs LY (act)
		Actual	Act % Bud	Total	Budget	
Total Sales Breakdown						
	TOTAL REVENUE					
COST OF GOODS SOLD						
	TOTAL MATERIALS					
	TOTAL COST OF GOODS SOLD					
	GRAND PROFIT					
OPERATING EXPENSES						
	Total Rent Expense					
	Total Salaries Expense					
	TOTAL OPERATING EXPENSES					
	OPERATING INCOME					

Profit & Loss Breakdown - Top Down

Actual Date Through September, 2019
CRONUS USA, Inc.

CRONUS&INC BUDGET

Enter Desired Net Income >>>

Account No.	Description	Dept	YTD		Budget	Variance	Status
			Actual	% of Bud			
Dashboard Category							
	Revenues						
	Expenses						
	Margins						
	Balance Sheet						
	KPIs						

Revenue Dashboard

Revenue Month: **\$2.7M** | Revenue YTD: **\$24.6M**

Goal: \$2.6M (+38%) | Goal: \$24.9M (-12%)

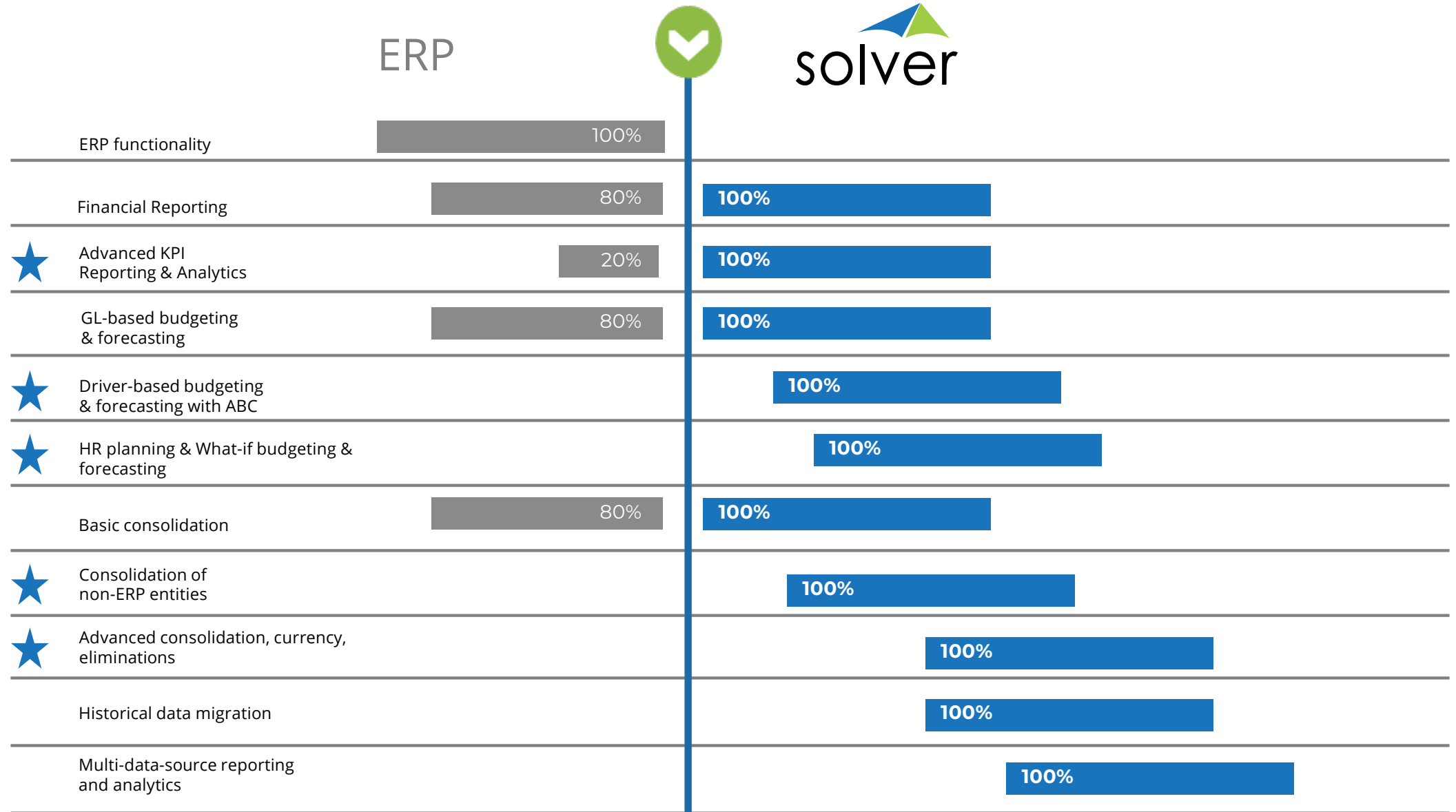
Actual and Budget by Category

Total Revenues - Trend

Revenue by Category



Solver Expands ERP Functionality





solver



**EVERY USER
RECEIVES**

SOLVER SUITE

AZURE CLOUD

Security
Scalability

eLEARNING

On-demand
Certifications

**DATA
WAREHOUSE**

Pre-built
Configurable
Connectors

REPORTING

Financial & Operational
Consolidations
Dashboards

PLANNING

Budgeting
Forecasting
What If Analysis

MARKETPLACE

100+
Ready-to-use
Templates

All-Inclusive Licensing

To accelerate better decisions.

Solver makes it easy to solve today's complex challenges with simple and clear licensing.

\$100/month, per user



Solver Global References



Healthcare



Hospitality



Financial Services



Media & Entertainment



Manufacturing & Distribution



Not-for-Profit



Retail



A blurred background image of a business meeting. A person's hand is pointing at a document with a line graph, while another person's hand holds a pen over the same document. The scene is brightly lit, suggesting an office environment.

Partner Program Benefits



Partner Video

"Solver's collaborative partnering strategy led us to build our significant Solver Practice in 12 months. Our clients saw immediate value in the turnkey reports and budget templates."



<https://solverglobal.wistia.com/medias/ogk9u2yih7>

The screenshot shows a video player interface. On the left, a man in a blue patterned shirt is speaking. Below him is the logo for 'armanino' and the text 'Mark Wagner, CPA Director, Technology Consulting'. On the right, the 'Template Marketplace' software interface is displayed, featuring a sidebar with navigation options like 'Home', 'Process Manager', 'REPORTING', 'Ad Hoc Reporting', 'Report Templates', 'Publisher', 'Report Archive', 'PLANNING', 'Input Templates', 'Input Flow', 'Workflows', 'Assignments', 'Template Marketplace', 'Data Warehouse', and 'Settings'. The main content area shows various report templates such as 'R162 - Balance Sheet Act YTD', 'R165 - Balance Sheet Trend', and 'R170 - Balance Sheet Consolidating Report', each with a 'See details' and 'Add to install' button.

Template Marketplace

Partner Program Options



Referral Partners

Fast track to partnering with Solver and closing deals



Reseller Partners

Comprehensive approach to building a Solver Practice across your organization and customer base



Alliance Partners

For publishers and ISV solutions that may want to integrate with Solver

We Offer Partners

Recurring Revenue Streams

While driving growth and value for your clients

Dedicated Partner Team

Solver has dedicated partner managers for reselling partners to onboard and manage relationships

Effortless Implementation

Patented QuickStart integration technology gets clients financial reporting in as little as a day

Self-Paced Training

Available via the Solver Sales Academy

Tiered Program to Grow your Solver Practice

Identified pathway for partners that wish to move from Referring to Reselling partners

Marketing Tools to Drive Demand

Partner Portal for deal reg, sharable content, and marketing campaigns

Fastest path to all program benefits available to Reselling Partners

- Partner Assessment
- Create Solver Practice Plan
- Create Financial Plan
- Recurring Review Meetings

Key Onboarding Resources

- Solver Marketing Program
- Solver Academy
- Micro Vertical Program



World Class On-Boarding

For Partners that desire to transition to Reselling Partners

Start as a Referral Partner

- Partner with Solver Sales and Presales teams
- Solver will lead the Sales efforts with opportunities you provide
- Collaborate and win 3 new Solver Cloud deals
- Complete a comprehensive Solver Onboarding Plan
- Sign a Reseller Agreement
- Build YOUR Solver Practice

Margin on each new deal:

Referral Partners:

20%

Initial Software Contract Only

Reseller Partners:

30%

Solver Software

30%

Solver Services

The Path from Referral to Reselling Partner...

Solver Partner Portal

- Refer Leads
- On-demand sales and marketing resources to support the sales process
- Easily share content with clients and prospects



Partner Awards





Leader

WINTER

2024



Easiest Setup

Enterprise

**WINTER
2024**



Easiest To Do Business With

Enterprise

**WINTER
2024**



High Performer

Enterprise

**WINTER
2024**



Customer Reviews



Bail, Shari

A.W. Holdings, LLC., DBA Benchmark Human Services



Great Customer Service

February 3rd, 2023

We have been using Solver for a few months and are very happy with the reporting tool. We especially like the Ad Hoc Reporting option that will allow our team to easily slice and dice data as needed. The Solver team was extremely helpful throughout the onboarding process and the Solver Academy has been a great resource for ongoing learning.

What Customers Say:

- 3 Week Deployment of Solver
- After 2 Months live on Solver Purchased 50 additional Solver Users
- Helps ensure the entire ERP Solution is "sticky"



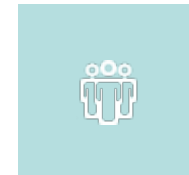
Next steps

IT'S EASY!

- 1 Sign the Partner Agreement
- 2 Partner Onboarding
- 3 Schedule Marketing Meeting
- 4 Refer Leads through the Portal
- 5 Create Happy Clients & Earn Referral Fees!

Any Questions?

Contact us at partner@solverglobal.com
or contact your Solver partner rep



www.solverglobal.com