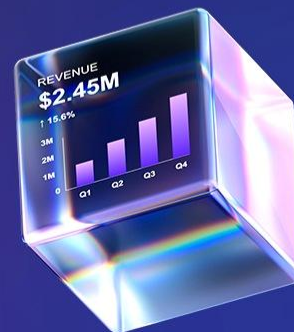




Autonomous Finance Realized

Welcome to the Delegation Era



Building Board Ready Reports



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What makes a report not ready for board review?



Characteristics of Bad Reports

Stylistic Components

Formatting

- X Difficult to navigate or read
- X Headlines describe content, not the message
- X Missing data labels
- X Unclear UOM

Data Quality

- X Data without context or business meaning
- X Cannot distinguish signal vs noise
- X Point in time without benchmark

Inconsistencies

- X Baseline data changes
- X Shift in framing period-over-period
- X Cannot prepare trends (WoW, MoM, YoY)
- X Individual customizations
- X Trends without interpretation

Examples where bad style exists...

Report Mode

Pages

Delay page change

Client

Customers

Resource

Internal + External

View Indicators

Enter below Data	
Previous SLT Realized Rate	\$ 206
Normalized Realized Rate	\$ 158
Week	14

Week	Billed Hours	Master Planning	Version	Realized Rate * Hours	SLT Used
(2026P01) January	3799	4125		\$ 801,640	
(2026W01) Dec 29 - Jan 2	151	100	Actuals Hours	\$ 31,756	
(2026W02) Jan 5 - Jan 9	1133	855	Actuals Hours	\$ 239,114	
(2026W03) Jan 12 - Jan 16	957	934	Actuals Hours	\$ 201,969	
(2026W04) Jan 19 - Jan 23	757	997	Actuals Hours	\$ 159,674	
(2026W05) Jan 26 - Jan 30	802	1240	Actuals Hours	\$ 169,127	
(2026P02) February	5613	5810		\$ 1,156,299	\$
(2026W06) Feb 2 - Feb 6	1236	1349	Actuals Hours	\$ 254,544	
(2026W07) Feb 9 - Feb 13	1366	1470	Actuals Hours	\$ 281,478	
(2026W08) Feb 16 - Feb 20	1132	1409	Actuals Hours	\$ 233,130	
(2026W09) Feb 23 - Feb 27	1879	1583	Actuals Hours	\$ 387,146	
(2026P03) March	7825	6725		\$ 1,612,049	\$
(2026W10) Mar 2 - Mar 6	1891	1733	Actuals Hours	\$ 389,608	
(2026W11) Mar 9 - Mar 13	2172	1710	Actuals Hours	\$ 447,510	
(2026W12) Mar 16 - Mar 20	1984	1680	Actuals Hours	\$ 408,766	
(2026W13) Mar 23 - Mar 27	1778	1603	Actuals Hours	\$ 366,165	
(2026P04) April	2631	7526		\$ 1,550,356	\$
(2026W14) Mar 30 - Apr 3	1235	1433	Forecasted Hours	\$ 295,095	
(2026W15) Apr 6 - Apr 10	1331	1507	Forecasted Hours	\$ 310,442	
(2026W16) Apr 13 - Apr 17	65	1603	Forecasted Hours	\$ 340,621	
(2026W17) Apr 20 - Apr 24		1600	Forecasted Hours	\$ 329,497	
(2026W18) Apr 27 - May 1		1334	Forecasted Hours	\$ 274,701	
(2026P05) May		5066		\$ 1,043,596	\$
(2026W19) May 4 - May 8		1434	Forecasted Hours	\$ 295,404	
(2026W20) May 11 - May 15		1330	Forecasted Hours	\$ 273,877	
(2026W21) May 18 - May 22		1169	Forecasted Hours	\$ 240,814	
(2026W22) May 25 - May 29		1134	Forecasted Hours	\$ 233,501	

Report Mode

Pages

Delay page change

Client

Customers

Resource

Internal + External

View Indicators

Enter below Data	
\$	206
\$	158
	14

Master Planning	Version	Realized Rate * Hours	SLT Rate Used	Non-rec Rate * Hours	Normalized Realized Rate
4125		\$ 801,640	\$ 211	\$ 600,280	\$ 158
100	Actuals Hours	\$ 31,756		\$ 23,779	
855	Actuals Hours	\$ 239,114		\$ 179,052	
934	Actuals Hours	\$ 201,969		\$ 151,238	
997	Actuals Hours	\$ 159,674		\$ 119,567	
1240	Actuals Hours	\$ 169,127		\$ 126,645	
5810		\$ 1,156,299	\$ 206	\$ 886,870	\$ 158
1349	Actuals Hours	\$ 254,544		\$ 195,233	
1470	Actuals Hours	\$ 281,478		\$ 215,891	
1409	Actuals Hours	\$ 233,130		\$ 178,809	
1583	Actuals Hours	\$ 387,146		\$ 296,937	
6725		\$ 1,612,049	\$ 206	\$ 1,236,426	\$ 158
1733	Actuals Hours	\$ 389,608		\$ 298,825	
1710	Actuals Hours	\$ 447,510		\$ 343,236	
1680	Actuals Hours	\$ 408,766		\$ 313,519	
1603	Actuals Hours	\$ 366,165		\$ 280,845	
7526		\$ 1,550,356	\$ 206	\$ 1,189,108	\$ 158
1433	Forecasted Hours	\$ 295,095		\$ 226,335	
1507	Forecasted Hours	\$ 310,442		\$ 238,106	
1654	Forecasted Hours	\$ 340,621		\$ 261,253	
1600	Forecasted Hours	\$ 329,497		\$ 252,721	
1334	Forecasted Hours	\$ 274,701		\$ 210,693	
5066		\$ 1,043,596	\$ 206	\$ 800,428	\$ 158
1434	Forecasted Hours	\$ 295,404		\$ 226,572	
1330	Forecasted Hours	\$ 273,877		\$ 210,061	
1169	Forecasted Hours	\$ 240,814		\$ 184,702	
1134	Forecasted Hours	\$ 233,501		\$ 179,093	

Examples of bad style Continued...

				*LTD Billed Hrs / Project Duration		*Last 4 Weeks Billed Hrs / 4		*FCST 4 Weeks MP Hrs / 4		
		Weeks								
Resource	Client	Project Lead Time	Project Duration	Time to Value - Resource	Active Pace	Trailing 4 Week Pace	FCST 4 Week Pace			
Global		10	28	38	5.61	8.15	8.51			
North America		10	28	38	6.59	8.67	9.32			
EMEA		10	26	36	2.58	6.38	3.97			
Teams										
Team Dave	Customers	9	24	33	4.00	6.49	7.67			
	New Perspective - P2	9	24	33	3.17	3.88	7.25			
	NACO - P1	10	71	81	4.73	1.56				
	Ncontracts - P2	50	14	64	1.66	4.94				
	Oberg - P2 CM	6	16	22	0.06					
	Pawn TX - P2	7	14	21	6.64	4.63				
	N. S. - P3	19	11	30	8.16	5.25	14.75			
	LeTourneau - P1	8	16	24	3.16	7.00	1.00			
	MSF - P2 CM	5	16	21	1.19	2.13	3.75			
	Tellepesen - P2	17	15	32	1.10	2.63	9.50			
	SF Campus - P2	6	29	35	2.05	2.00	2.75			
	SanYsidroHealth - P2	0	8	8	1.19	2.38	0.38			
	aimbridge - P3	14	6	20	2.17	2.75	7.25			
	Adstra	17	11	28	8.32	9.25	13.25			
	Aphena - Solution Units 2025-2026	18	52	70	1.04	2.00	1.00			
	Allstar - P3	10	14	24	7.25	9.88	2.00			
	Health Connect - P1	19	12	31	11.27	11.06	2.00			
	Humangood - P6	7	44	51	4.40	22.13	24.50			
	HTI - P3	12	14	26	5.54	11.63	15.25			
	Inland - P2 FPA	7	11	18			0.25			
	ETO - MS ACV 2025/2026 - Manag	0	95	95	0.17	0.50	0.50			
	ECCB - P1	0	17	17	6.76	17.75	25.00			
		20	25	45						

Characteristics of bad reports

Delivery Components

Knowledge or Understanding

- Assumes context instead of establishing one
- Leaves room for interpretation
- Explains what changed but not why
- Overuse of internal terminology/acronyms

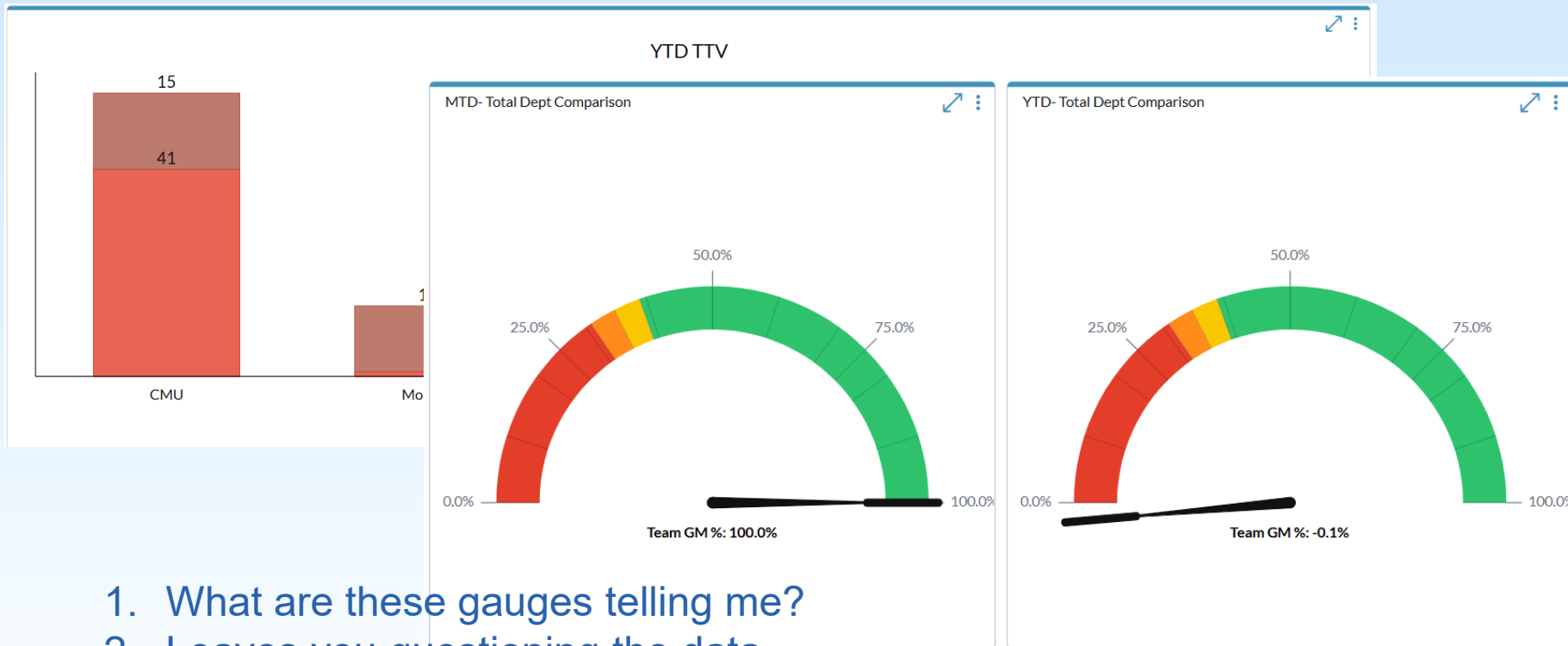
No Action/Next Steps

- Snapshot or current picture only
- Reports lack direction to drive decisions
- What do we do next unclear to audience
- Reactive instead of intentional messaging

Messaging

- No clear message or POV
- Lacks strong story/narrative
- Messaging doesn't tie to data
- Data overload, minimal insight
- Focused on process vs outcomes

Examples of where bad delivery exists...



1. What are these gauges telling me?
2. Leaves you questioning the data

Bad reports don't fail on data – they fail on message, clarity and direction



What makes a report ready for board review?



Characteristics of good reports

Stylistic Components

Formatting

- ✓ Appropriate use of charts, tables or visuals
- ✓ Highlights and callouts to draw attention to what matters most
- ✓ Logical section flow that guides the reader's eye

Data Quality

- ✓ Accurate, complete and up-to-date data
- ✓ Clear definition for metrics/calculations
- ✓ Data that is trustworthy and repeatable
- ✓ ACT/FCST/BUD clearly distinguished

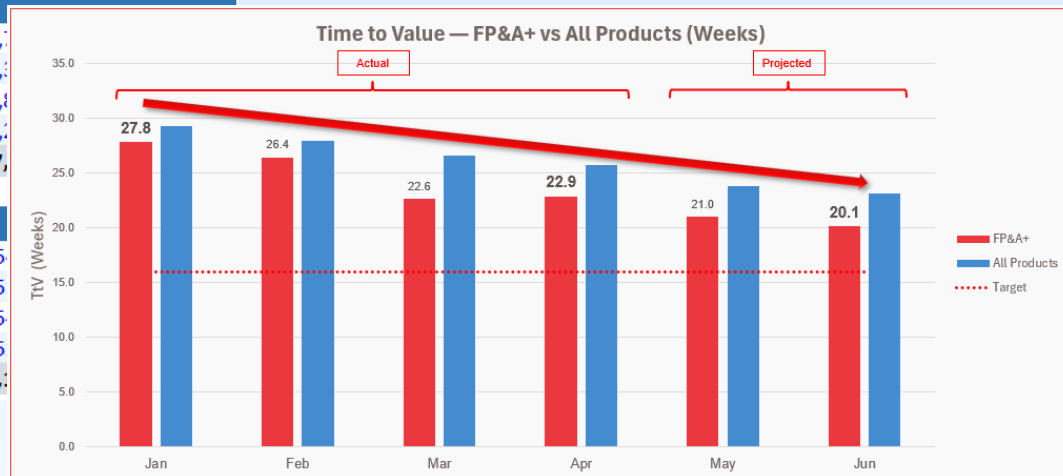
Inconsistencies

- ✓ Flagging methodology changes in advance
- ✓ Addressing discrepancies proactively
- ✓ Terminology/labels used consistently

Examples of good style...

1. Clean and polished
2. Eyes are drawn towards the arrow

Utilization by Location (Excl. AU) — Monthly Breakdown					
Month	Earned Hrs (Incl. GW)	Billed Hrs Forecast	Total Available Hrs	Forecast Attain %	Actual Utilization %
Canada					
(2026P01) January	2,766.9	2,804.0	7,...		
(2026P02) February	4,160.1	4,337.0	6,...		
(2026P03) March	4,334.4	4,967.0	6,...		
(2026P04) April	3,714.9	5,681.5	6,...		
Canada — YTD Total	14,976.3	17,789.5	27,...		
USA					
(2026P01) January	305.5	516.0	5,...		
(2026P02) February	467.8	376.0	5,...		
(2026P03) March	380.5	391.0	5,...		
(2026P04) April	463.1	523.5	5,...		
USA — YTD Total	1,616.9	1,806.5	2,...		



1. Zero room for interpretation
2. Format/layout are consistent

Characteristics of good reports

Delivery Components

Knowledge or Understanding

- Tells a clear story with supporting evidence
- Highlights key insights, not just raw numbers
- Tailored to audience's level of expertise
- Enables stakeholders to quickly grasp current state

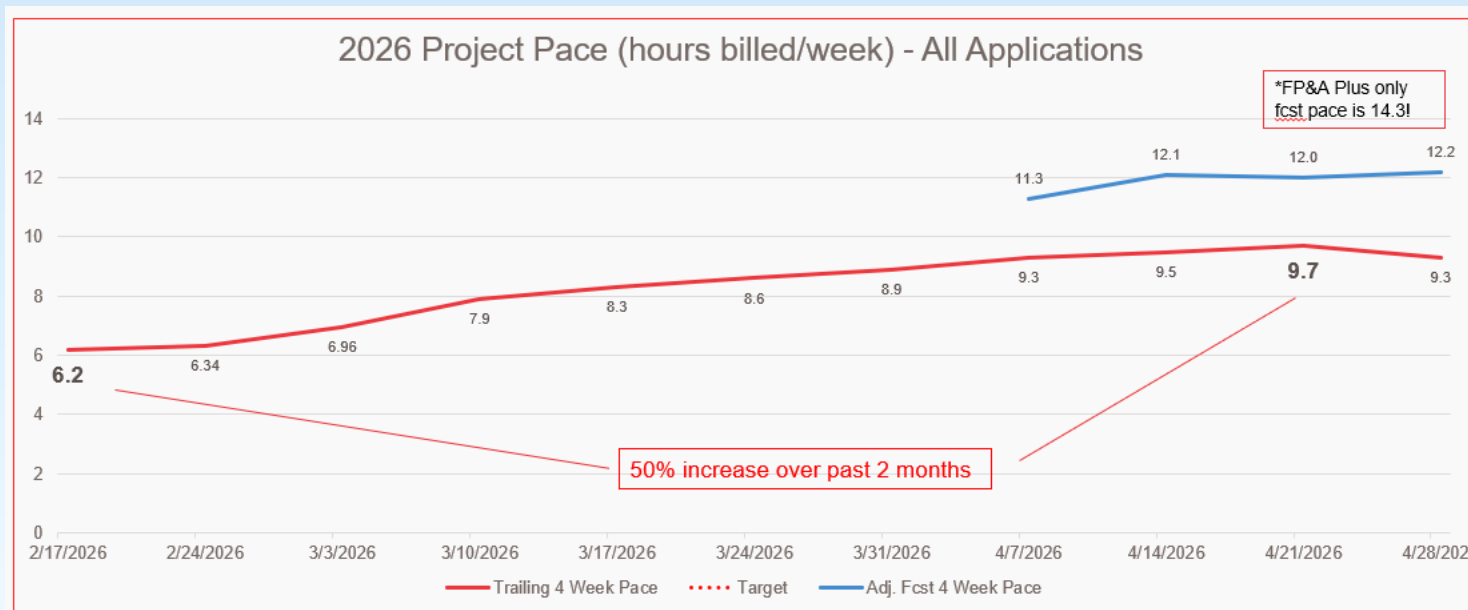
Clear Action/Next Steps

- Includes measurable outcomes
- Explicitly states what decisions are required
- Prioritize recommendations by impact/urgency
- Links insights directly to operational or strategic outcomes

Messaging

- Leads with most important findings
- Aligned with organizational goals
- Visuals/text reinforce messaging
- Emphasizes insights over volume of information

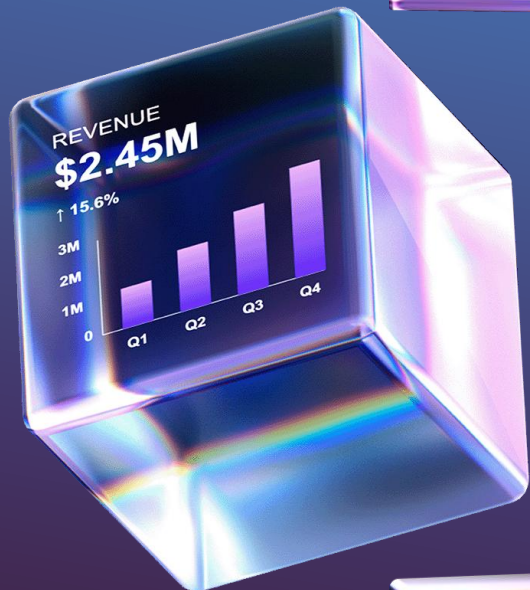
Examples of good delivery...



1. Highlight what you want to show – 50% improvement
2. Don't be afraid to make values stand out more

**Delivers concise,
decision-focused
insights with
forward-looking
recommendations**





Tips to Make You a Master



Structure your board package like a story

Every board package follows a narrative arc — orientation, performance, insight, direction

1. Executive Summary

- One page, leads with the headline
- Top 3 findings + recommendation
- Written for a 30-second read
- Must stand alone

2. Financial Performance

- P&L, balance sheet, cash flow in order
- ACT vs BUD vs FCST clearly labeled
- Highlight variances needing action
- Keep format identical period-over-period

3. KPIs & Appendix

- 5-8 metrics that matter most
- Include trend + target alongside value
- Appendix for deep-dive questions
- Never force details into main deck

Design dynamic financial statements

Static P&L printouts are not financial statements — they are a starting point. Build for flexibility from day one.

Scenario Design

- Always show ACT, BUD, and FCST side by side
- Design scenarios as views, not separate reports
- Label all columns consistently — never assume context
- Include period label: MTD, QTD, YTD on every view

Rolling Forecasts

- Replace point-in-time BUD with 12-month rolling view
- Shows where you're headed, not just where you are
- Forces discipline: teams must update FCST each cycle
- Build in a “full year landing” row for board focus

Drill-Down Readiness

- Design top-level summaries that link to detail
- Board sees the summary; finance has the backup
- Never include detail that distracts from the message
- Have supporting schedules indexed and ready

Variance views that tell the story

Variance analysis is not about showing every number that moved — it's about curating the story of why performance landed where it did

01

What to Show

- Show both \$ variance and % variance
- Current period AND year-to-date view
- Prior year comparison where trend adds value
- Limit commentary to top 3–5 material drivers

02

Color & Conventions

- Consistent fav/unfav color convention
- Revenue: positive = favorable (green)
- Expense: negative = favorable (green)
- Never change conventions mid-cycle

03

Variance Commentary

- Explain why, not just what changed
- One sentence per key driver is enough
- Distinguish structural vs. timing variances
- Always state forward implication

Standardize your reporting layout

Every time the format changes, the board spends mental energy re-orienting instead of analyzing. Consistency is a trust signal.

Templates

- Build master templates for each report type
- Lock headers, section order, and column structure
- Changes require sign-off — not ad hoc customization
- Version control: always work from the approved template

Naming & Labels

- Standardize metric names across all reports
- Define UOM once and display it always (000s, \$M, %)
- Date format and period labels must be identical
- Eliminate internal acronyms — write for the reader

Governance

- One owner per report — accountability drives quality
- Document methodology changes before they appear in reports
- Establish a report review checklist pre-submission
- Conduct quarterly report audits for consistency drift

Streamline the close-to-board cycle

If your team is still rebuilding the board package from scratch each cycle, that's a process problem — not a people problem

Automate the Data

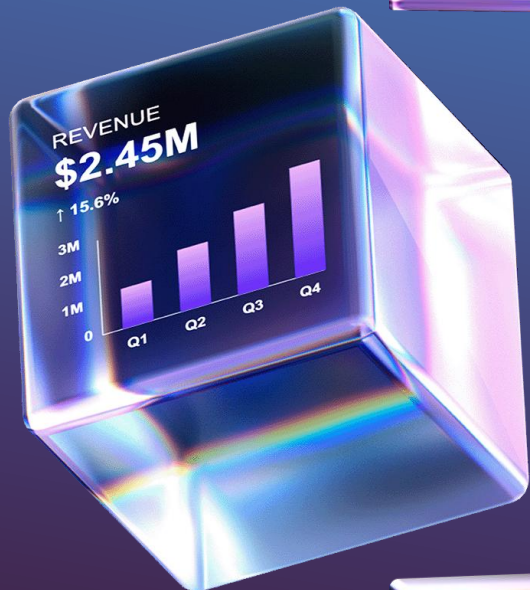
- Data should flow automatically from source systems
- Eliminate manual copy/paste steps — that's where errors live
- Schedule data refreshes to align with close calendar
- Build data validation checks into the workflow

Define the Workflow

- Document every step: who, what, when, in what sequence
- Assign owners to each report component
- Build in review gates — not just at the end
- Publish the calendar: board expects it on a specific day

Cut the Cycle Time

- Time saved on formatting = time gained for insight
- Target: 80% of prep time on analysis, 20% on production
- Track cycle time as a metric — improve it every quarter
- Repeatability = the hallmark of a mature finance function



Visuals in FP&A Plus



The executive summary: Write it last, design it first

The executive summary is the most important page in your board package. Most finance teams treat it as an afterthought.

What to Include

- Opening headline: the one-sentence story of this period
- 3–5 key highlights with brief supporting context
- Top risks or items requiring board decision
- Forward-looking statement: YE outlook or next milestone

Language & Tone

- Write in plain business English — no finance jargon
- Active voice: “Revenue grew 8%” not “Revenue growth was seen”
- Confident — not hedging every statement with caveats
- Test: would a non-finance board member understand it?

What to Avoid

- Do not repeat the financial statements in prose form
- Never write “revenue was in line with expectations” — say by how much
- Avoid listing everything — curate to the most material
- Do not bury the headline in paragraph three

Choose the right chart for the message

Every chart type answers a different question. Start with the question, then choose the chart — not the other way around.

Trend & Comparison

Line • Clustered Bar • Combo

- Line chart: movement over time
- Clustered bar: comparing categories
- Combo: actual + forecast on same axis
- Avoid pie charts for 3+ categories

Variance & Composition

Waterfall • Stacked Bar

- Waterfall: walking from one value to another
- Best for EBITDA bridge, BUD vs ACT
- Stacked bar: parts of a whole over time
- 100% stacked: proportion shifts

When to Use a Table

Precision • Financial Statements

- Precision of every number matters
- Financial statements: always a table
- Add conditional formatting to highlights
- Never use when message is directional

Visual hierarchy: Direct the reader's eye

Board members scan before they read. Design every page so the most important information is found in the first 5 seconds.

Callouts & Highlights

- Use callout boxes for key metrics: large number, small label
- Bold or color the most important number on the page
- Arrow indicators: up/down/flat with % change
- Limit highlights to 1–3 per page — everything highlighted = nothing highlighted

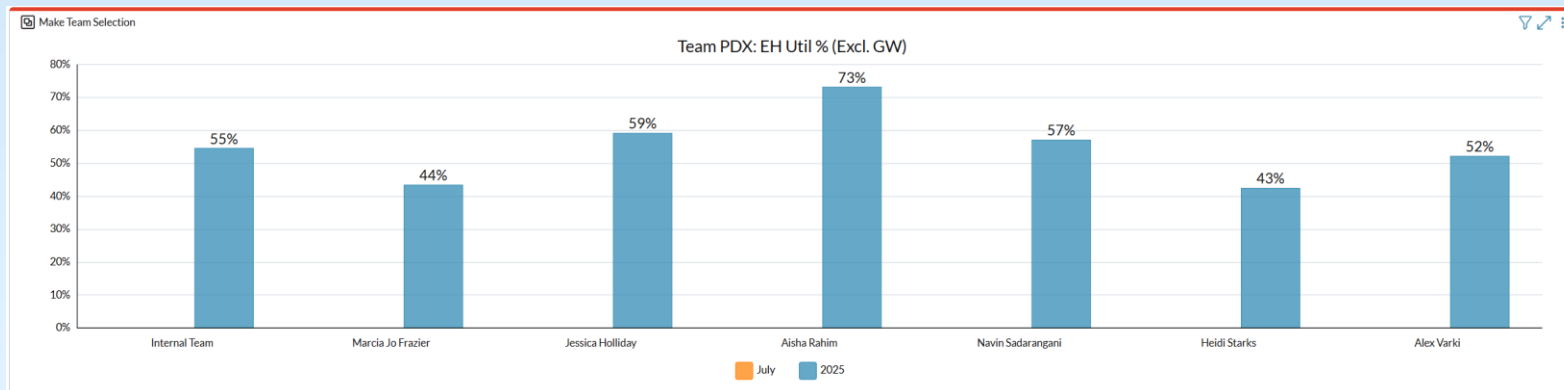
Conditional Formatting

- Color-code cells/rows based on variance threshold
- Use data bars or sparklines for at-a-glance trends
- Threshold rules: auto-flag variances over 5% or \$500K
- Build rules once; they apply automatically every cycle

White Space & Density

- Dense pages signal “data dump” — boards disengage
- One message per page — split when needed
- Margins and consistent spacing create a professional feel
- Print test: does it still read clearly at 85% zoom?

Examples of great visuals



What to Look For

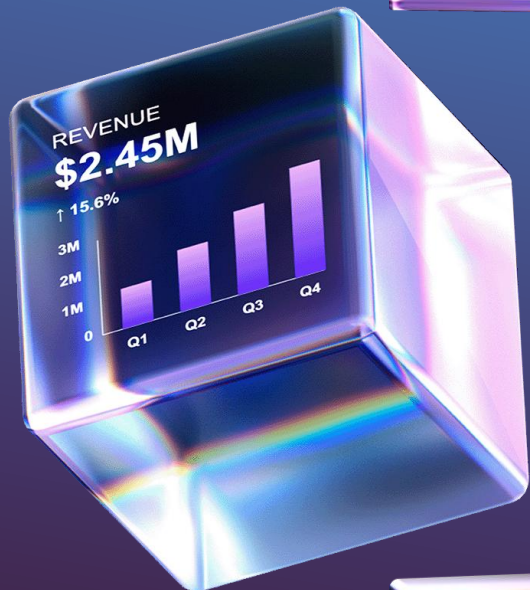
- Clear headline above every chart — states the insight, not just the topic
- Labeled axes with UOM clearly shown
- Target or benchmark line visible for context
- Annotation or callout on the key data point

Common Issues to Fix

- Chart title that just repeats the axis label
- Too many series on one chart — split or simplify
- Y-axis not starting at zero (can be misleading)
- Colors that have no meaning — every color should mean something

The 5-Second Test

- Show the page to someone unfamiliar with the data
- After 5 seconds: what was the main message they took away?
- If they can't answer: redesign the page
- The board should not have to work to understand your report



Prophix in Action



Building board packages in Prophix

Every principle we've covered today is built into how Prophix is designed — from data integrity to layout standardization to automated distribution

Report Designer

- Drag-and-drop layout builder with locked templates
- Embed charts, tables, and narrative in one view
- Brand-consistent formatting applied automatically
- Export to PDF or PowerPoint on demand

Dynamic Narratives

- Embed data-driven commentary blocks in reports
- Text updates automatically when underlying data changes
- No more copy-pasting numbers into narrative paragraphs
- Consistent messaging enforced across all report recipients

Version Control & Audit

- Every report version is stored and timestamped
- Full audit trail: who changed what, when
- Eliminates “which version did we send?” conversations
- Supports SOX compliance and audit readiness

Scenario & variance views in Prophix

Side-by-side scenario views and automated variance callouts — built once, refreshed automatically every cycle

Scenario Modeling

- Run Base, Upside, and Downside scenarios simultaneously
- Single model: change an assumption, all views update
- Present range of outcomes, not just one number
- Boards can stress-test assumptions in the meeting itself

Automated Variance Callouts

- Set thresholds: flag when variance exceeds defined %/\$
- Callout boxes auto-populate on the relevant page
- Conditional color formatting applies automatically
- Exception-based: only material variances surface to the board

Waterfall & Bridge Reports

- Native waterfall chart: BUD → ACT EBITDA bridge
- Automatically segments variances by driver category
- Board-ready in 2 clicks — no manual chart building
- Works across P&L, cash flow, and balance sheet

Repeatable reporting: Set it and don't forget it

The goal: a board package that practically builds itself — so your team focuses on insight, not production

Scheduling & Distribution

- Schedule report delivery aligned to your board calendar
- Automatically push to board portal, email, or SharePoint
- Role-based access: board sees board package; ops sees ops
- No more manual PDF creation and email attachments

Continuous Improvement

- After each cycle: solicit feedback from board recipients
- Track: what questions came up that the report didn't address?
- Annual template review: remove what's no longer relevant
- Measure success: time to deliver, errors, board questions answered

What “Done” Looks Like

- Board receives the package 5 days before the meeting
- Zero surprises in the board room — they came prepared
- Finance team spends meeting presenting insight, not defending data
- Board consistently makes faster, better-informed decisions



Application Demo

Scan the QR code and complete the
course evaluation to earn your CPE credit



Thank You

This is coming. And you can help shape it.

What you saw today isn't available yet — but your voice determines what it becomes.

We're inviting customers to be part of what comes next — not as observers, but as contributors. The experiences you have, the friction you feel, and the outcomes you need are exactly what this product should be built around.

Your experience shapes the product. We're here to listen.

At the conference

Visit the product & design team

Come talk to us directly. Tell us what you need, what's missing, and what would make this indispensable for your team.

Early access group

Influence what gets built next

Join our early access group to give direct input on the roadmap, test new capabilities before general release, and ensure the product is built around how your team actually works.



What you can do next

Each of these steps will move you closer to the experience you saw today.

Expand your platform

Explore FP&A Plus

Unlock advanced driver-based modelling, expanded scenario planning, and deeper workflow automation — built directly on top of what you use today. **Same data. Same team. Significantly more capability.**



[Download the FP&A Plus comparison guide](#)

Expand your platform

Connect your full platform

Prophix connects planning, consolidation, and reporting into a single environment. Each application you add reduces the number of systems your team has to manage.



[Book a call with your account manager](#)

Have a voice

Join the early access group

Give direct input on the roadmap, test new capabilities before general release, and ensure the product is built around how your team actually works.



This week

Visit the product & design team

We're here at the conference. Come find us, share your experience, and tell us what would make this indispensable for your team.

Your feedback directly shapes what we build next.