



# Autonomous Finance Realized

Welcome to the Delegation Era



# Data-Driven Dashboards

Turning Data Into Decisions: The Power of  
Prophix Dashboards



# Dana Orth

Dana is a Partner Success Manager at Prophix focused on driving adoption and customer value. She works with partners and customers to ensure they are using Prophix features, like dashboards, with accurate data to support effective decision-making. With a background in implementation and process improvement, she brings a practical perspective on how strong reporting and data visibility drive engagement, improve outcomes, and maximize ROI.



# Show of hands

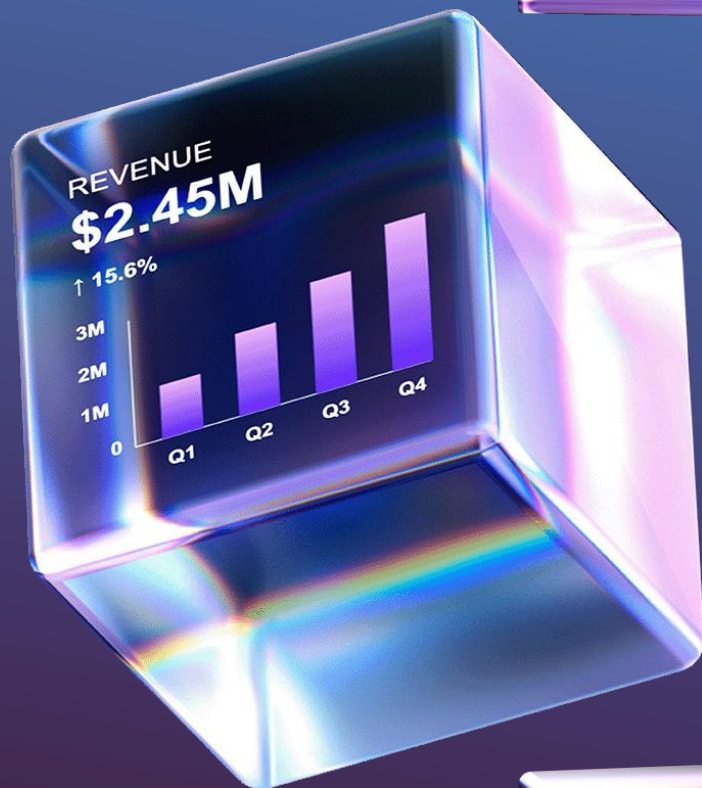
How are your dashboards working for you?

- I have dashboards built and my stakeholders use them independently.
- I have dashboards built but still get questions or have to explain the data.
- I'm still working on building dashboards or just getting started.



# What you'll learn today!

- 1** How to design dashboards that get used
- 2** Research-backed framework for best practices
- 3** How to leverage dynamic dashboard features in Prophix
- 4** How to share dashboards and drive adoption across your organization



# Why dashboards matter



**How many of you have  
ever been in a meeting  
where two people had two  
different numbers for the  
same thing?**

**Who spent more time this  
month pulling data  
together than actually  
analyzing it?**

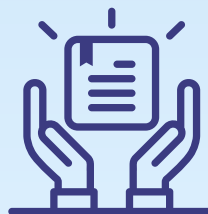
**How many of you built  
something you're proud of  
that maybe three people  
look at?**

# Dashboards solve these pain points.



## Shift from reporting to insight

No more spending an hour pulling data someone could find themselves.



## One source of truth

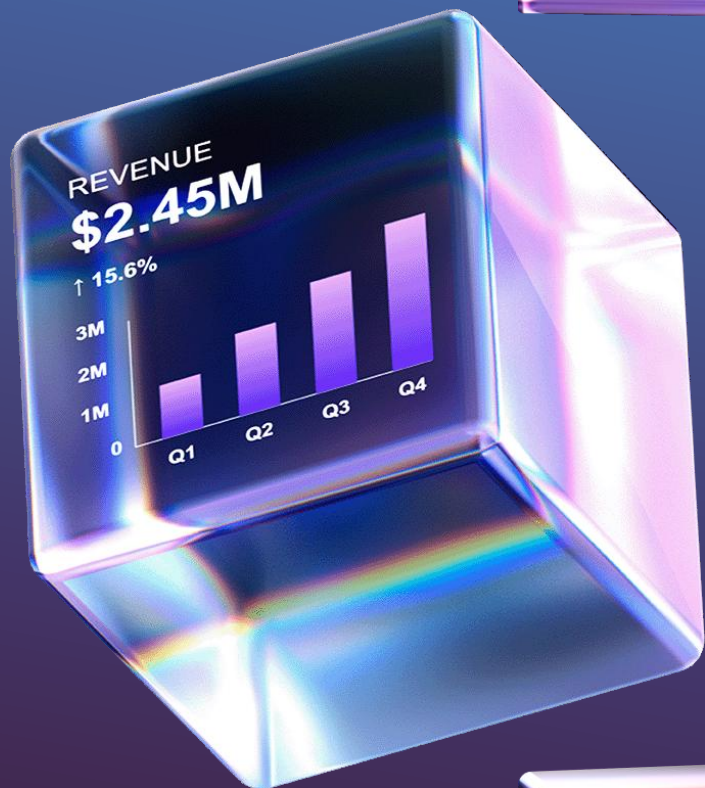
No more two people, two numbers, one awkward meeting.



## From data to decisions

Less time assembling, more time actually using it.

**Bonus!**



# Best practices

Research-backed elements that make a dashboard effective



# What Makes a Dashboard Effective

## Key principles



### Clarity

**Fewer metrics, faster decisions.**

*Studies show the average attention span on any screen is 47 seconds. Design for that.*



### Relevance

**Built for the reader, not the builder.**

*A CFO and a department head need completely different things from the same data.*



### Actionability

**Every metric needs a job.**

*That's the test. If you can't name the decision, the data point shouldn't be on the dashboard.*

# Get visualization right

Clear, easily interpretable, and supports decision-making



**Bonus!**

Trends over time → Line charts

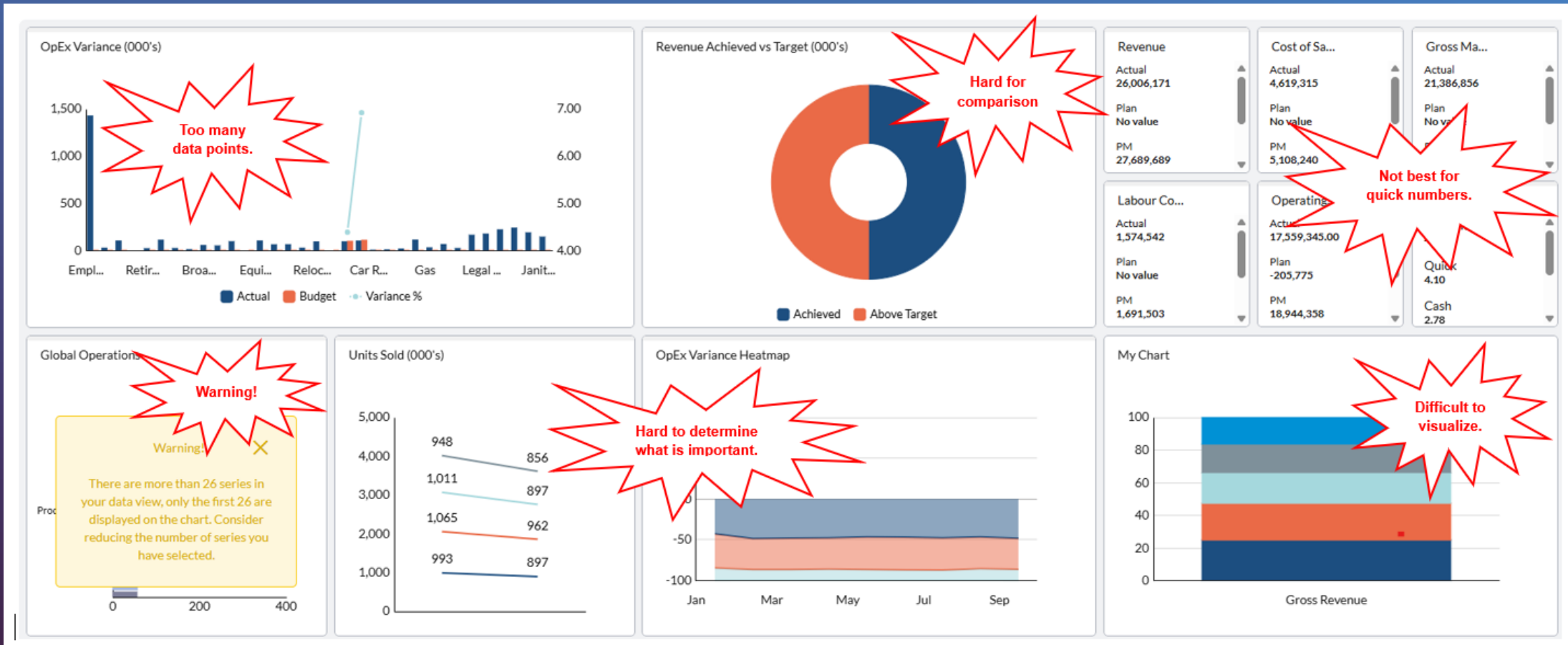
Comparing performance → Bar/column charts

Proportion of total → Pie/donut charts

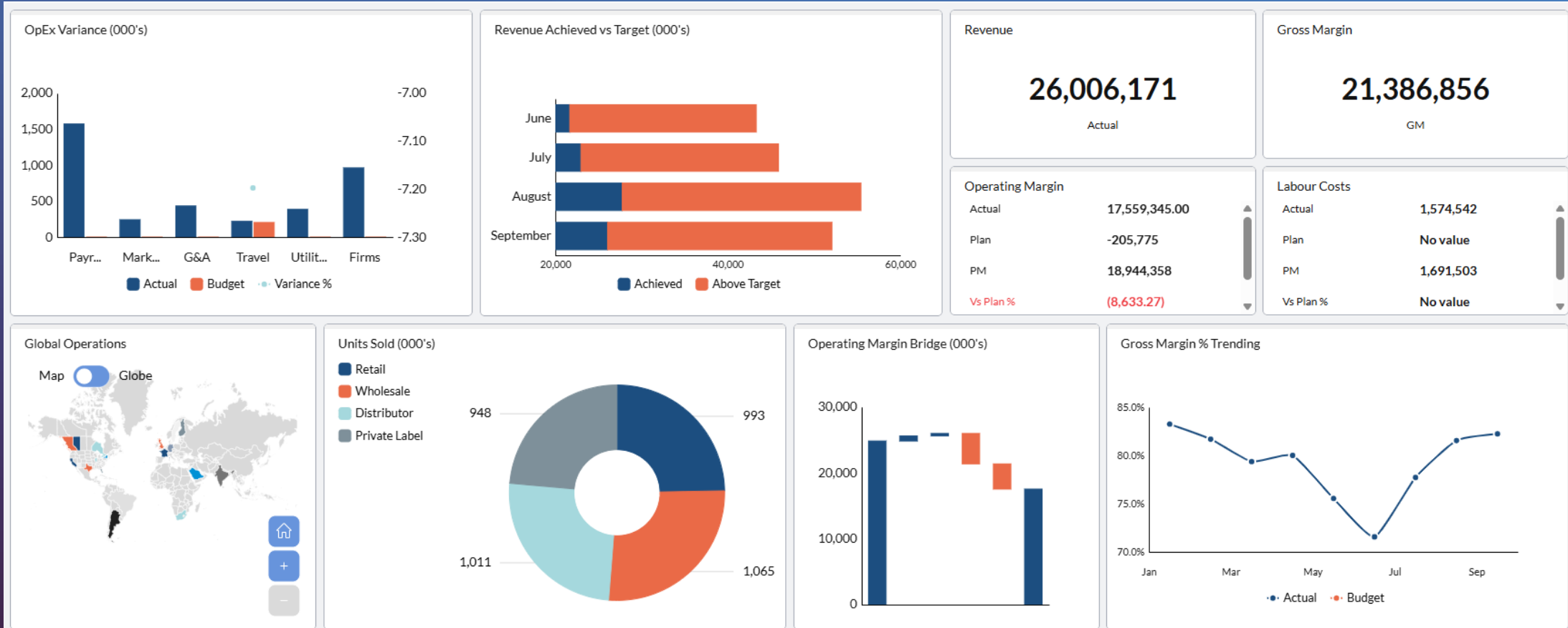
Financial health at a glance → Badge tiles for KPIs

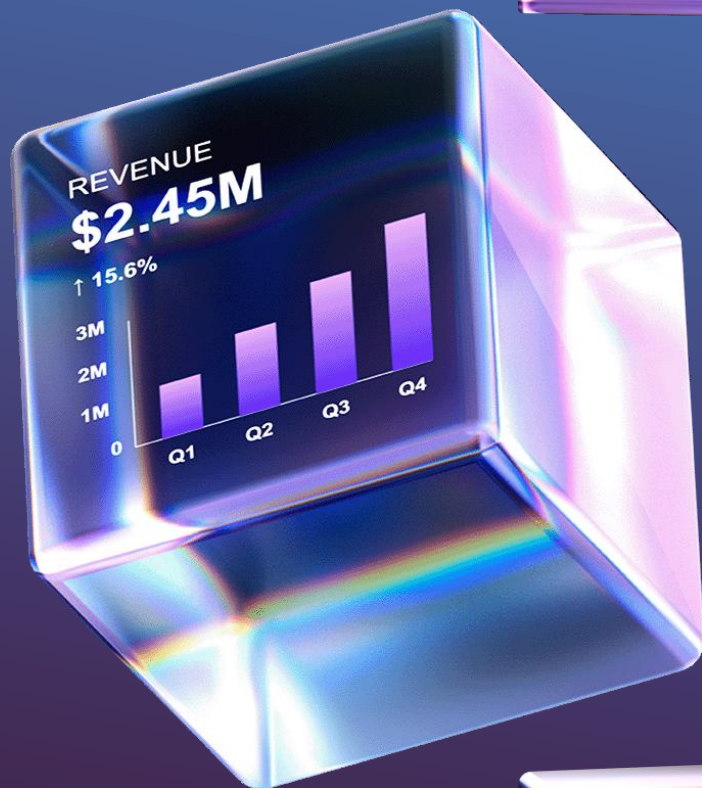
Drill-down insights → Interactive charts and heatmaps

# Inefficient dashboards



# Let's make it better





# Dashboard use cases

Real world examples



# FP&A Dashboard

### Top 15 Expenditures

	Actual	Budget	Variance	Variance %	PY Actual	YoY Gr
Employee Salaries	1,426,921		-1,426,921		1,308,201	118,
Audit & Accounting	238,737		-238,737		224,177	14,
Information Technology	220,040		-220,040		203,923	16,
Professional Development	188,434		-188,434		173,918	14,
Legal Services	174,040		-174,040		159,560	14,
Telephone, Fax, T1 lines	162,699		-162,699		149,494	13,
Janitorial Services	143,049		-143,049		132,124	10,
Hydro	111,488		-111,488		102,691	8,
Advertising	109,522		-109,522		71,960	37,
Equipment Maintenance ...	102,206		-102,206		96,751	5,
Benefits	101,375		-101,375		92,940	8,
Airfare	100,664	108,150	7,486	7	93,089	7,
Office Expense	94,304		-94,304		87,617	6,
Lodging	93,341	97,625	4,284	4	90,073	3,

### OpEx Variance Heatmap

### My Favorites

- Monthly Financial Report Package.pdf  
Date added: Apr. 24, 2025
- OpEx Reforecast Template  
Date added: Apr. 24, 2025
- Predictive Forecasting Processes  
Date added: Apr. 24, 2025
- Monthly Reforecast Income Statement  
Date added: Apr. 24, 2025
- Integrated Financial Statements

### Global Operations

Map  Globe

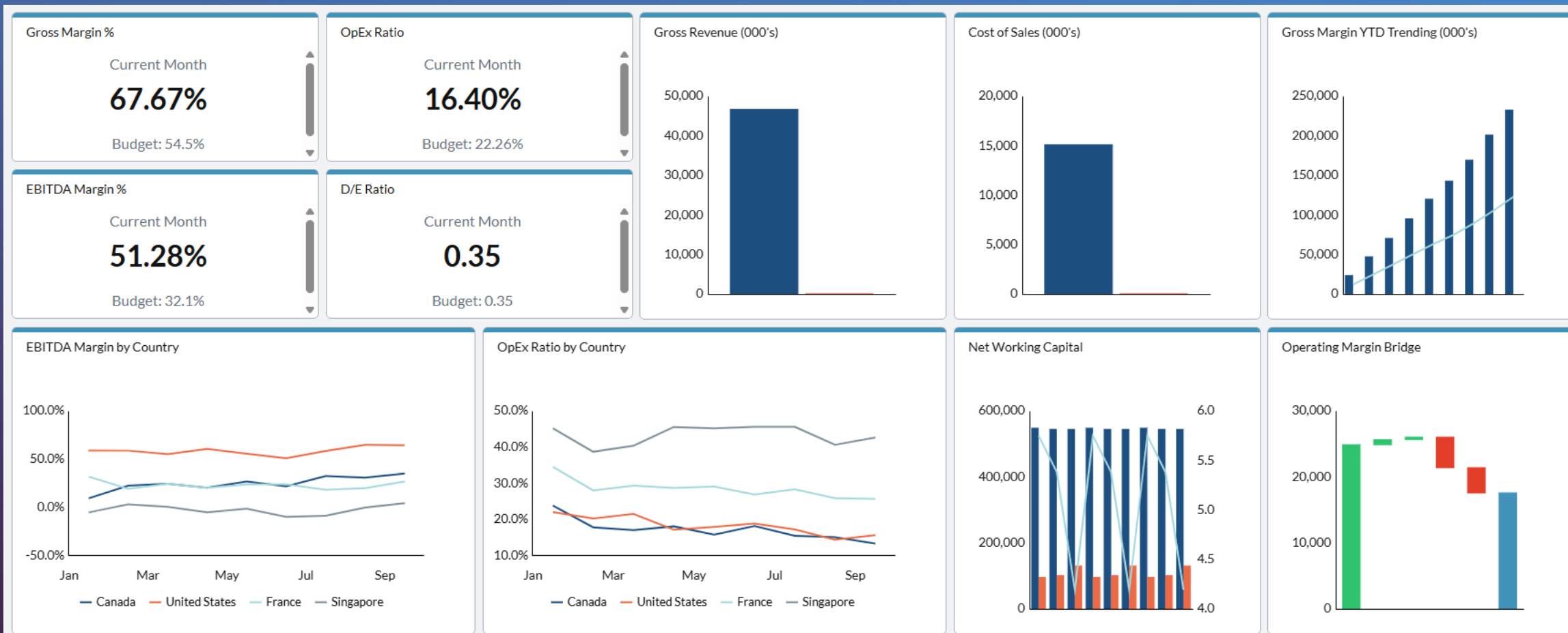
### Units Sold (000's)

### Operating Margin Bridge (000's)

### My Tasks

- Production Planning  
Work in progress Dec. 31, 2026
- COGS Planning  
Work in progress Dec. 31, 2026
- OpEx Planning  
Work in progress Dec. 31, 2026
- Personnel Planning  
Work in progress Dec. 31, 2026
- Copy Demand Qty to Plants  
Dec. 31, 2026

# CFO Dashboard



# End User Dashboard

### OpEx Variance (000's)

Category	Actual	Budget	Variance %
Payroll	1550	-	-7.08
Marketing	250	-	-7.24
G&A	450	-	-7.26
Travel	220	200	-7.28
Utilities	380	-	-7.30
Firms	950	-	-7.16

#### My Announcements

**Contacts**

For access issues, talk to Drew.  
For help using Prophix, talk to Jerry.  
For questions about the numbers, talk to Michael.

#### My Tasks

- @ **Production Planning** Dec. 31, 2026  
Work in progress
- @ **COGS Planning** Dec. 31, 2026  
Work in progress
- @ **OpEx Planning** Dec. 31, 2026  
Work in progress
- @ **Personnel Planning** Dec. 31, 2026  
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- @ **Copy Demand Qty to Plants** Dec. 31, 2026  
Work in progress

#### My Favorites

- 📄 **Monthly Financial Report Package.pdf**  
Date added: Apr. 24, 2025
- 📄 **OpEx Reforecast Template**  
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- 🔄 **Predictive Forecasting Processes**  
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- 📄 **Monthly Reforecast Income Statement**  
Date added: Apr. 24, 2025
- 📄 **Integrated Financial Statements**  
Date added: Apr. 24, 2025
- 📄 **Integrated Planning Template - Scenario Analysis**  
Date added: Apr. 24, 2025
- 📄 **Monthly Variance Income Statement**  
Date added: Apr. 24, 2025
- 📄 **Monthly Top OpEx Variance Analysis**  
Date added: Apr. 24, 2025
- 📁 **Monthly Financial Report Binder - Reforecast**  
Date added: Apr. 24, 2025
- 🔄 **Distribute Report Binder - Reforecast**  
Date added: Apr. 24, 2025

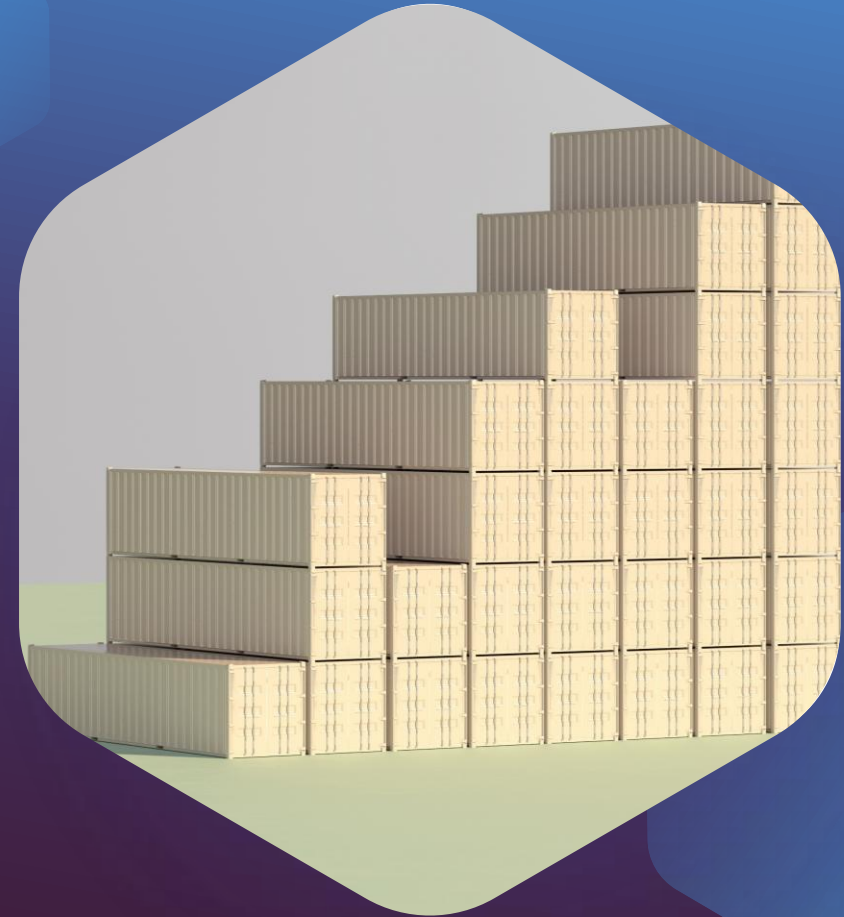
# Show of hands

Who already knows which of these dashboards they need to build first?



# Dynamic dashboards

How to make your dashboards work harder  
without rebuilding them.



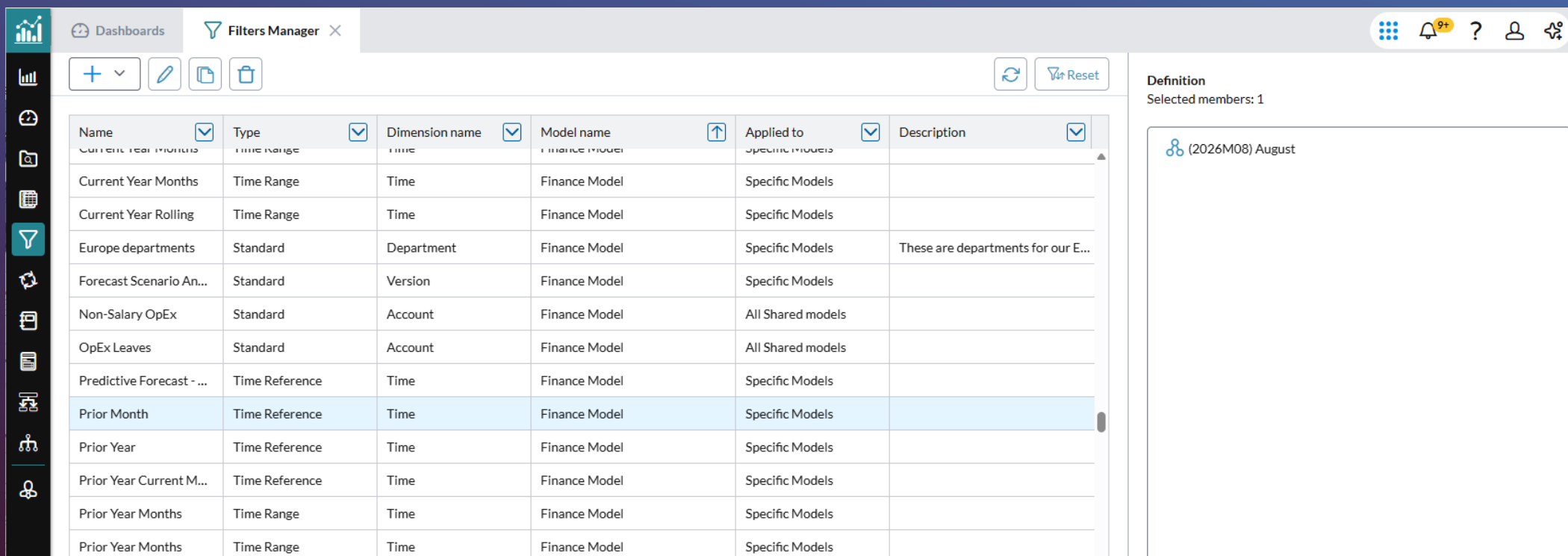
# Filters Manager

Filters Manager lets you define reusable filters across your dashboards without rebuilding them.

**Set filters by dimension:**  
time, department, account, version,  
and more

**Apply once, update everywhere:**  
change the filter and every dashboard  
using it updates automatically

**Example:**  
A "Current Month" filter means you never  
manually swap out time periods again



The screenshot shows the Filters Manager interface. At the top, there are tabs for 'Dashboards' and 'Filters Manager'. Below the tabs are several icons for adding, editing, and deleting filters. A table lists various filters with columns for Name, Type, Dimension name, Model name, Applied to, and Description. The 'Prior Month' filter is selected. To the right, a 'Definition' panel shows the selected members for the filter: '(2026M08) August'.

Name	Type	Dimension name	Model name	Applied to	Description
Current Year Months	Time Range	Time	Finance Model	Specific Models	
Current Year Rolling	Time Range	Time	Finance Model	Specific Models	
Europe departments	Standard	Department	Finance Model	Specific Models	These are departments for our E...
Forecast Scenario An...	Standard	Version	Finance Model	Specific Models	
Non-Salary OpEx	Standard	Account	Finance Model	All Shared models	
OpEx Leaves	Standard	Account	Finance Model	All Shared models	
Predictive Forecast - ...	Time Reference	Time	Finance Model	Specific Models	
<b>Prior Month</b>	Time Reference	Time	Finance Model	Specific Models	
Prior Year	Time Reference	Time	Finance Model	Specific Models	
Prior Year Current M...	Time Reference	Time	Finance Model	Specific Models	
Prior Year Months	Time Range	Time	Finance Model	Specific Models	
Prior Year Months	Time Range	Time	Finance Model	Specific Models	

**Definition**  
Selected members: 1

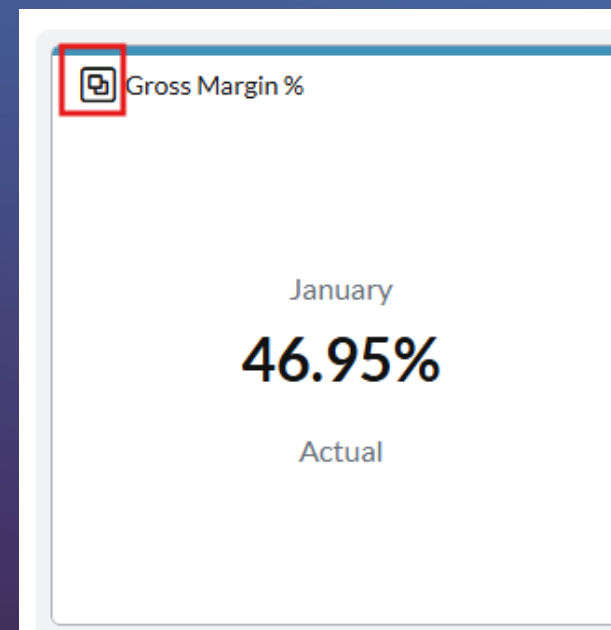
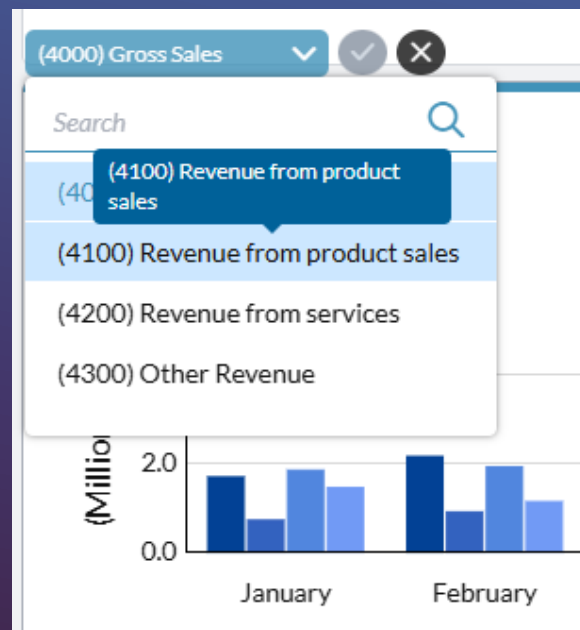
(2026M08) August

# Dashboard Filters

Filter by department, product, time, version and more

Each user sees the slice of data that matters to their role

Tile Groups: filter once and every grouped tile updates together



# Dynamic Charts

Dashboard charts aren't static. They're built to be explored.

## Drill Up/Down:

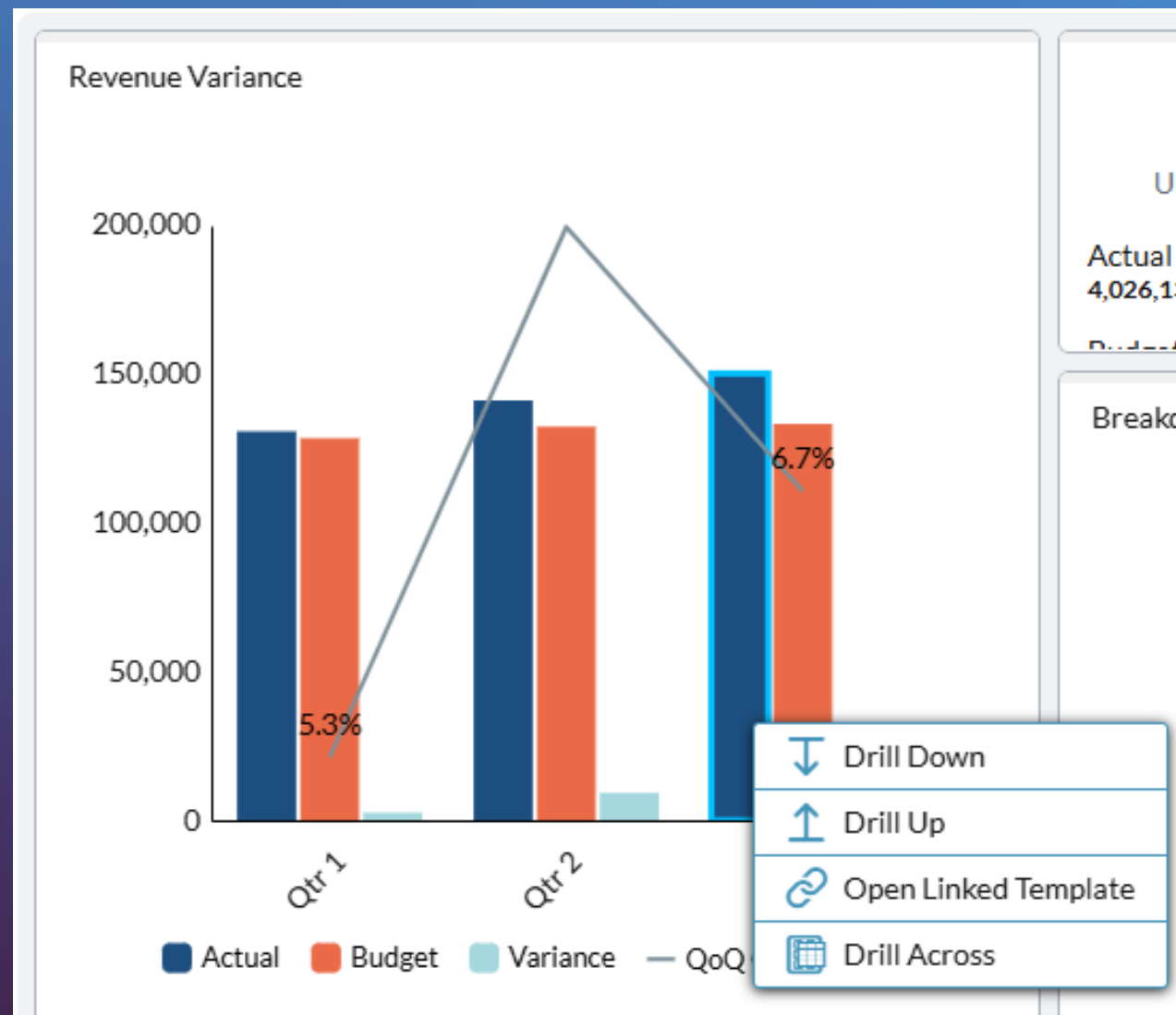
Click into any data point to see the detail behind it, or zoom out for the bigger picture

## Linked Template:

Connect a chart directly to a full report for when someone needs to go deeper

## Drill Across:

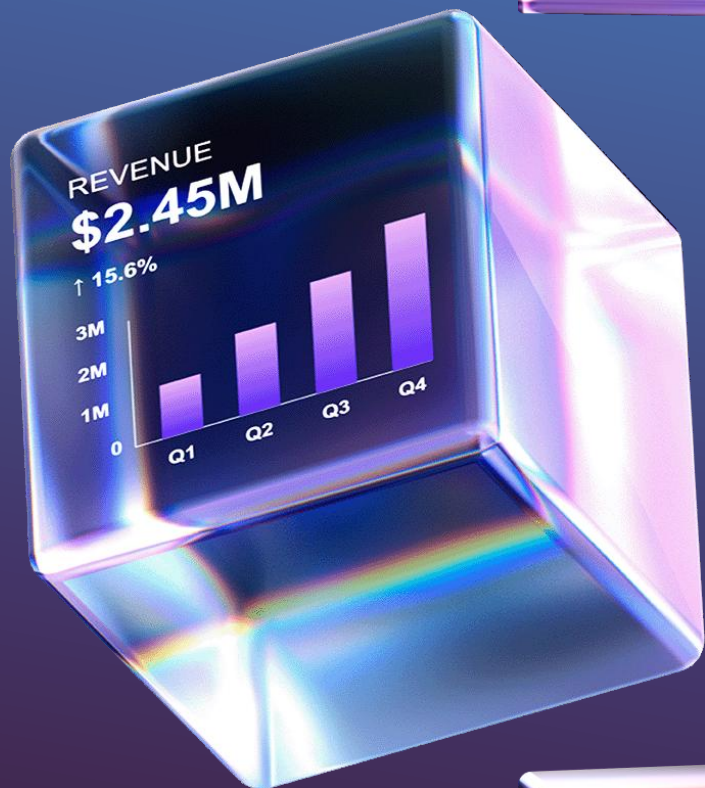
Surface the supporting data behind any member combination in one click



# Demo

Let's see it in action.





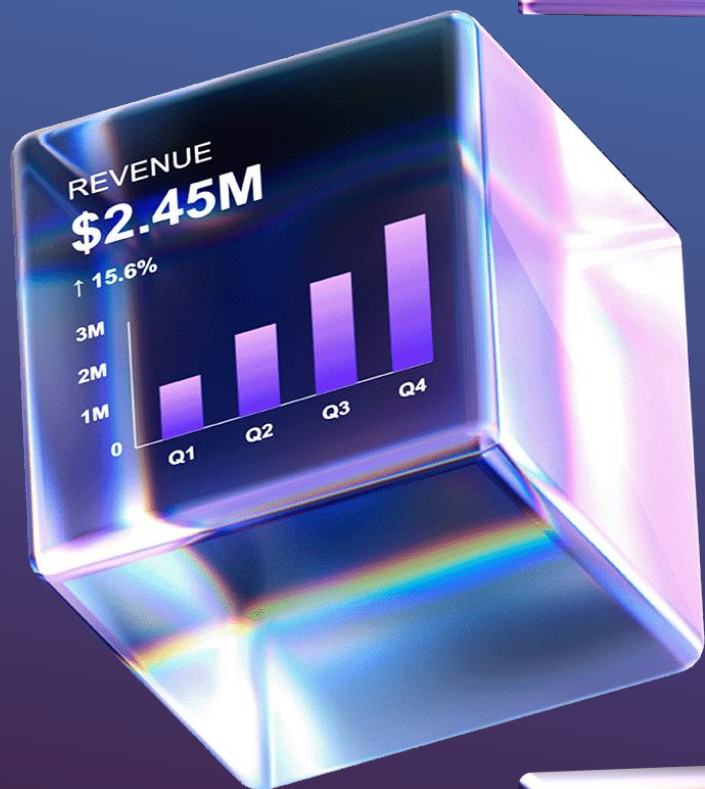
# Building can be the easy part.

Build it and no one sees it - failure.  
Show it and no one uses it - still a failure.



**How many of you wish  
your stakeholders could  
just find the answer  
themselves?**

# Driving adoption



- 1** Assign before go-live – favorites, links, no hunting required
- 2** Use it in the room – leadership models it or adoption stalls
- 3** Repeat the signal – dashboards become habits through scheduled exposure, not one announcement

# Your next step

Pick one. Do it next week.



Build your first new dashboard  
this week



In your next meeting, lead with an  
existing dashboard



Unsure where to start? Book time with a  
consultant if you need a starting point



# What we learned today

- Fewer metrics, faster decisions. Clarity is a design choice.
- If it wasn't built for the reader, it wasn't built.
- Build it and no one sees it – failure. Show it and no one uses it – still a failure.



# Questions?



# Thank you



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

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# 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.**