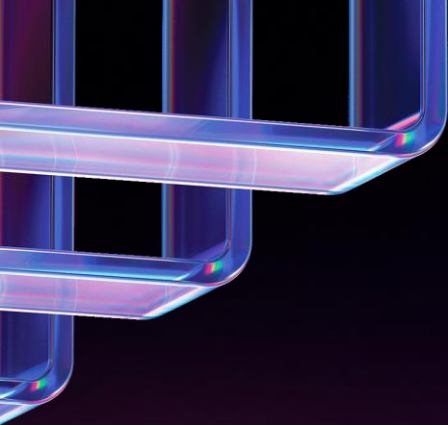


Prophix One FP&A in Practice

Immediate Wins and the Road Ahead



What we're covering today

- 1 Quick Wins You Can Action Today
- 2 FP&A Plus: Expanded Capability
- 3 Customer Story: Housing 21
- 4 Vision & What's Next

Welcome

This session is for you if...

You're on FP&A Classic

- Leave with features you can action immediately
- Understand what Plus unlocks for teams like yours
- Hear why 200+ customers have already made the move

You're already on FP&A Plus

- See how peers are using capabilities you haven't explored yet
- Get inspiration from Housing 21's real-world deployment
- Understand what's coming on the roadmap



Tips & Tricks for FP&A

FP&A –

Tips and Tricks

TIP 1

Cashflow

How Prophix helps you build your cashflow models step by step

TIP 2

Capex

Building your capex step by step

TIP 3

Auto-Commentary

Using BI to automate your variance comments

TIP 4

Time Dimensions

Transform your time perspective into an additional time dimension



Classic to Plus What's Unlocked

What stays the same

Whether you're on Classic or already using Plus, the foundation remain:

Built for finance, by finance

*The same planning,
reporting, and analysis
workflows you rely on today.*

Your work is protected

*Models, reports, and
institutional knowledge carry
forward. Nothing is lost in the
move.*

Evolution, not replacement

*Plus builds on what Classic
does well. Same foundation,
expanded capabilities and
greater capacity.*

An In-Depth Look at Prophix Infinix

The Engine that powers Prophix One™ FP&A Plus



High Performance Planning Unlocked



Learn more about
Prophix Infinix

Powered by Prophix Infinix

Cloud-Native Planning Engine

- Built for scale, flexibility, and real-time data access
- Handles large, complex models with no performance trade-offs

High-Performance Architecture

- In-memory processing for real-time calculations on large datasets
- Elastic resource scaling for peak planning cycles
- Multi-threaded processing for faster scenario modeling

Expanded Data Integration

- Ingest and unify data across ERP, CRM, HRIS, and operations
- Support higher data volumes and greater dimensionality
- Enable near real-time planning and analysis

New Use Cases Enabled

Operational Planning at Full Granularity

- Plan at SKU, project, customer, or cost code level
- Tie financial outcomes to operational drivers

End-to-End Revenue Planning

- Integrate pipeline, bookings, and revenue forecasts
- Align sales, finance, and operations in one model

Workforce & Capacity Planning

- Model headcount, comp, and productivity drivers
- Connect HR and financial plans dynamically

Supply Chain & Production Planning

- Model production volumes, costs, and inventory
- Optimize margins and working capital

Advanced Scenario Modeling

- Run concurrent scenarios with real-time insights
- Compare outcomes across business drivers
- Test strategic decisions with operational-level data

Performance Qualities

	Prophix One Financial Planning & Analysis	Prophix One FP&A Plus
Accounts More accounts allow for deeper, more detailed planning.	<2,000 Max 4,000	100,000+
Members in a Dimension More members enable deeper modeling of cost centers, entities, and products.	<3,000 Max 10,000	200,000+
Fact Table Records More data leads to higher accuracy and precision.	<5 million / Max 10 million	300 million +
Model Resource Processing Dedicated resources provide less idle time for data processing.	Shared	Dedicated

Classic to Plus: what's possible

200+ customers have already made the move



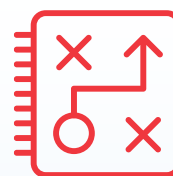
Performance & Scalability

The difference is scale: overhead allocation across entire organizations, dynamic templates handling complex models, processing that doesn't slow as data grows.



AI & Automation

Prophix One Agents automate reporting, variance analysis, reconciliation, and budgeting. Copilot in MS Teams enables natural-language queries where you already work.



Filters & scenario management

Dynamic filters replace static named sets. No republishing required when scenarios change.



Visualisation & dashboards

New chart types, table tiles, shareable dashboard links, badge tiles with live data.



Name sets & adhoc analysis

Improved formula bar transparency. Easier troubleshooting, greater trust in data.

AI in Practice: Customer Illustrations

Retrieving Financial Data

“What are the financial results for a specific account, report, or time period?”

1

Modifying or Generating Outputs

“Can you create, update, or adjust this report or data?”

3

Analyzing Financial Data

“What trends, comparisons, or breakdowns can be identified in these results?”

2

Guiding & Supporting Users

“Can you help me run or execute a financial process or workflow?”

4

DEMO



FP&A + Customer Story

Already on Plus:

Housing

UK-based not-for-profit and leading provider of safe, quality, and affordable properties for older people.

Application: Prophix One FP&A Plus

Integration: QL Housing

Sector: Social housing / regulated not-for-profit

The Challenge



30-year business plan submitted to regulator every year. Budget accuracy is non-negotiable.



Budget ownership fragmented. Sequencing informal. No enforced order.



Legacy finance system supplemented by spreadsheets and manual workarounds.



Finance team spent more time assembling numbers than interrogating them.



Before Prophix One	With Prophix One
 Unsequenced budget timelines	 Workflow-driven budgeting with enforced order and accountability
 Annual budget difficult to defend	 Audit-ready, defensible budget supporting 30-year business planning
 Manual variance checks across periods	 Seven-year trends and variances visible in a single, trusted view
 Cost drivers buried in aggregated totals	 Unit-level cost visibility over time to pinpoint drivers
 Reports rebuilt manually every cycle	 Standardised reports built once and reused automatically
 Reliance on one or two system experts	 Broad self-serve access with finance-led governance

Housing 21: key results

Confidence at scale

Faster, more defensible annual budgets rolling directly into a regulated, annually refreshed 30-year business plan.

Multi-year cost visibility

Seven years of historical cost analysis across a large housing portfolio, without slowing day-to-day reporting.

Build once, reuse repeatedly

Board packs and recurring reports automated through standardised templates — no spreadsheet or PowerPoint rebuild each cycle.

A more resilient finance culture

Hands-on analytics expanded across finance and operations, reducing reliance on single experts.

"Because of Prophix One, my reports to executives are a lot better. It's definitely shaped the conversation that the executives are going to have."

Mark Goodwin, Finance Leader, Housing 21



Looking Forward

Access Points

Prophix Copilot | 



Prophix Agent Orchestration

Finance team sets the rules, agents execute the steps without manual handoffs.

 **Budgeting Agent**  **Reporting Agent**  **Reconciliation Agent**  **Architect Agent**  **Consolidation Agent**

Prophix MCP Server*

Trigger Agent Workflows • Query Governed Foundation • Structured tool calls

Governed Foundation

Planning Logic • Driver models • Assumption Versioning • Variance Patterns • Cohort Intelligence • 25 years of Deterministic Financial Logic



Plan



Consolidate



Close



Report

Integration & Connection Layer

300+ Pre-Built Adapters • Real-time & Batch • Bidirectional Sync

Vertical Connectors

ERP & Financial Systems

HRIS & Data Sources



Ecosystem

Marketplace

Industry Modules
Pre-built templates
Vertical KPI packs

Partners

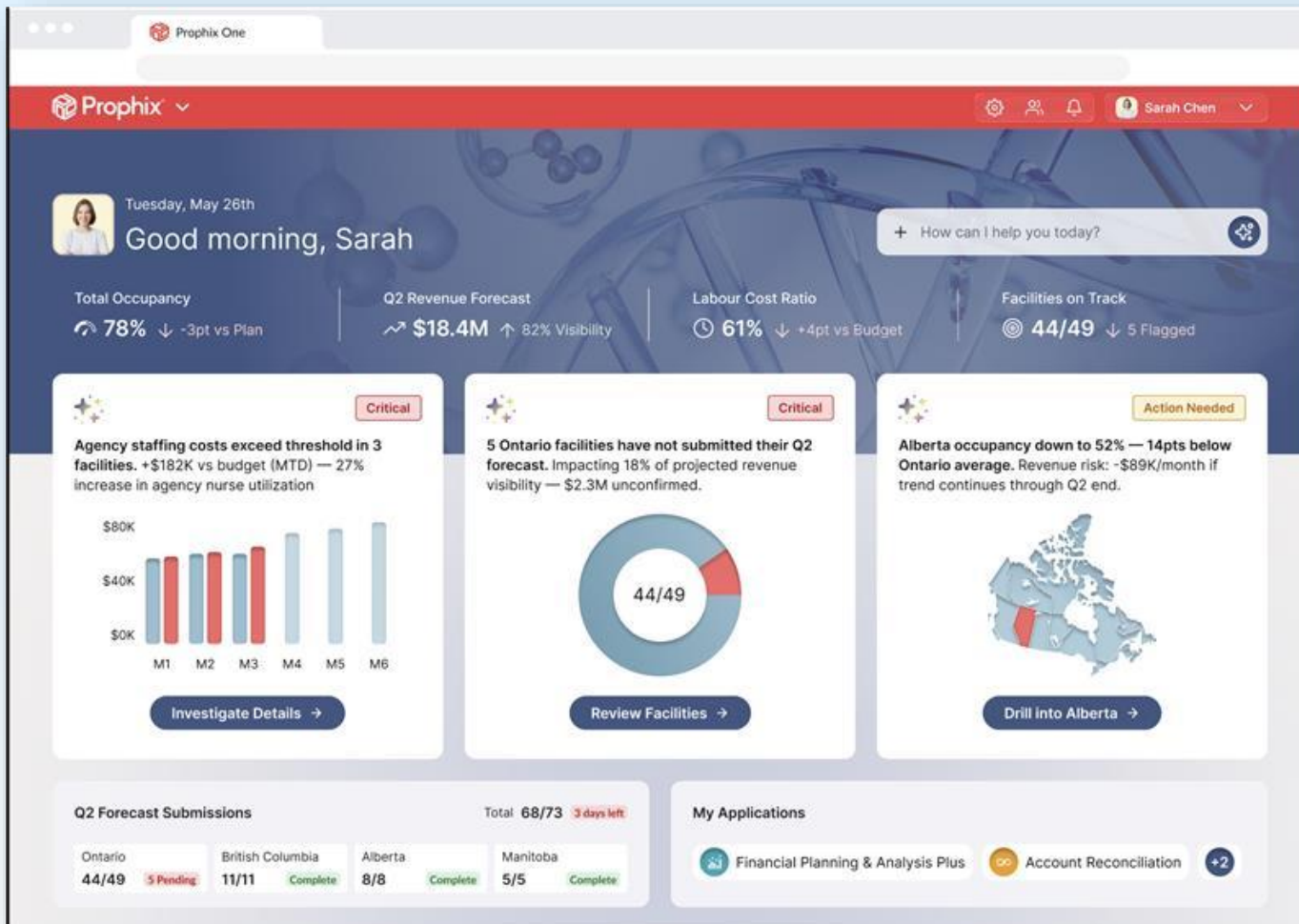
SI & Implementation
Global network of certified partners

Advisory

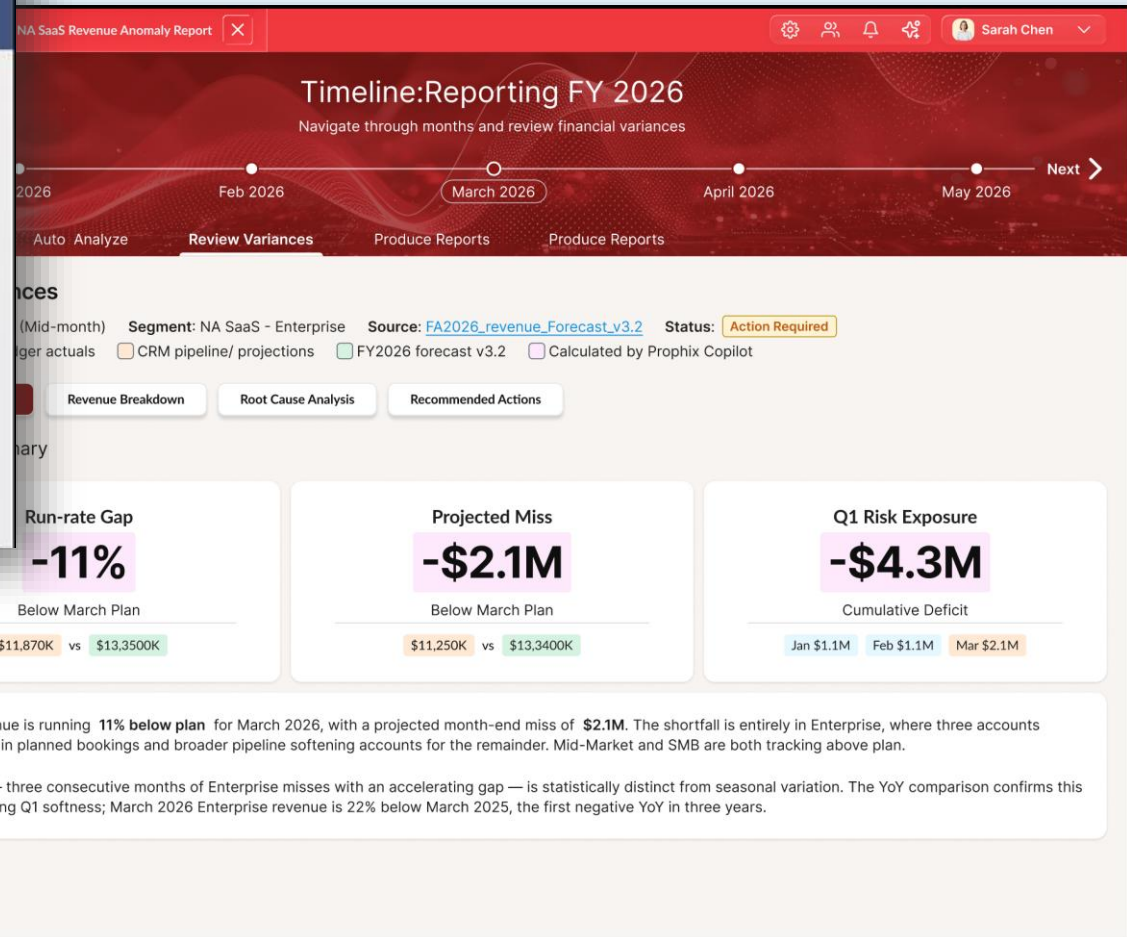
Accounting & CFO
Advisory Firms

Technology

ISV & Technology
Integrations



Dashboards



What you can do next

Discuss more

What you learnt today

Book a call with your account manager or speak to the Prophix team here at the conference. We're here to walk through specifics with your team.



Book a call with
your account
manager

Expand your platform

Explore FP&A Plus

Download the full comparison guide to see how Plus expands your capabilities. Same data. Same team. Significantly more capacity..



Download the
FP&A Plus
comparison guide

Have a voice in what we build

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

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.



Today

Visit the product & design team

Patrick Olivares and the product team are 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.

Q&A