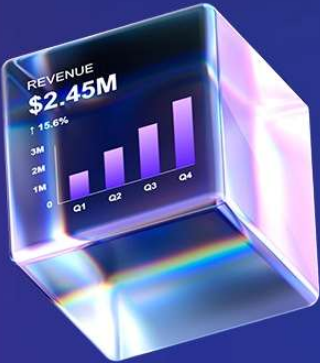




Autonomous Finance Realized

Welcome to the Delegation Era



Maximizing Impact

A Practical Framework for Continuous Value Delivery

Matt Koronkiewicz

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Speaker Profile

- Customer Success team lead, Prophix · 4+ years
- Background in commercial banking & financial services
- 10-year career working with finance teams across a broad range of industries
- Builds tools and frameworks that help CS deliver better outcomes



BEFORE THE AGENDA

**Why any of this should matter
to you.**

SCENARIO A · THE QUESTION FROM ABOVE



Your (board / CFO / manager) asks: what has Prophix delivered? And what's the plan from here?

Two fair questions. How quickly can you answer either one?

SCENARIO B · THE VALUE IS INVISIBLE



**Prophix is working.
Your team knows it.**

Nobody outside finance does.

SCENARIO C · DIRECTION WITHOUT A ROADMAP



You know Prophix should be doing more for your business.

Most teams have a direction. Very few have a real plan.

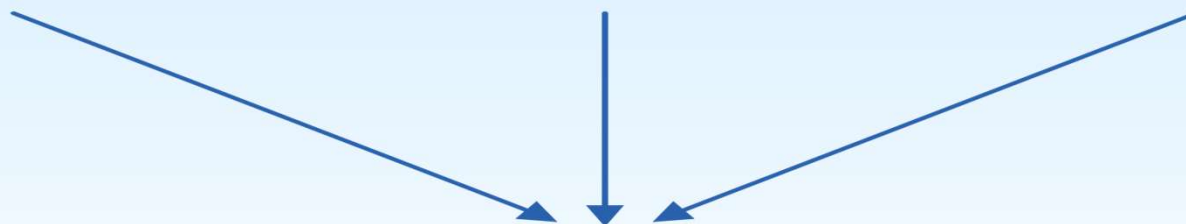
UNDERNEATH ALL THREE

Three different questions. Same underlying problem.

**Yet to quantify what
you've built in Prophix.**

**Success goes
unrecognized in the
broader org.**

**Potential left on the
table.**



The Problem
Communicating value.

THE TWO CONVERSATIONS

Both essential.

CONVERSATION ONE

Proof.

← **Looks back.**

Captures and quantifies the value you have already built. Names it, measures it, turns it into something you can hand your CFO.

ROI INTERVIEW

CONVERSATION TWO

Possibility.

Looks forward. →

Starts where you want to go and works back to what it would take to get there. A structured roadmap, not a wish list.

VALUE ROADMAPING

WHAT YOU'LL GET FROM EACH HALF

Four deliverables. Same for both.

- 01** What it means for you and your business.
- 02** A technique you can use this week.
- 03** Real examples from customers like you.
- 04** A clear path to go deeper with your Prophix team.

CHAPTER ONE

Proof.

The value you have already built.

← LOOKS BACK

WHAT IS AN ROI INTERVIEW?

A structured hour. A specific output.

60 min.

One conversation. One quantified, shareable artifact. Yours to keep.

WHO LEADS IT

Two Prophix people. Together.

01 Your Customer Success rep.

Knows your account, your history, your team. Can probe and interpret findings that deliver meaningful value.

02 An experienced Product Adoption consultant.

Technical expert who can turn artifacts into insights. Brings the discipline and the pattern recognition.

THE CORE QUESTION



**What value are we getting
from your work in **Prophix**
today?**

WHY IT'S HARD

Easy to name the *features*. Much harder to name the *outcomes* at the altitude a CFO responds to.

THE TECHNIQUE

A simple question, used with discipline.

So what?

The deceptively simple question.

Pulls every answer one step closer to a board-room sentence.

PLUS, THE POINTED ONES

We know your system. We've had enough of these conversations to recognize where value tends to hide.

- Where is this saving time, and for whom?
- What did you stop doing when you started doing this?
- Which of these results moved a number your CFO watches?

“SO WHAT?” IN ACTION

One statement. Four moves. A board-room sentence.

FEATURE “The users are set up, the templates are built, the workflows are running.”

↓ **SO WHAT?**

CAPABILITY “Fifty budget owners can enter their numbers directly. Each has live access to their own budget versus actuals, any time.”

↓ **SO WHAT?**

ACTIVITIES “They review their variance. They know what they're spending. They flag anomalies.”

↓ **SO WHAT?**

RESULTS “Forecast accuracy tightens. Cost control improves. Anomalies, and occasionally fraud, get caught before they compound.”

↓ **SO WHAT?**

OUTCOME “Tighter margins. More reliable planning. Seven consecutive years of double-digit growth in the division that took this furthest.”

YOUR TURN - 45 SECONDS

Use it on yourself. Right now.

01

Pick one thing your team does in Prophix.

A report you produce, a process you run, a model you maintain.

02

Ask “so what?”

Then ask again. Keep asking.

03

Stop when you reach a number, a risk avoided, or a better decision.

If you reach all three, even better. That's a board-room sentence.

**HANDOUT -
SIDE A**

Walk this through on the handout - Prompt #1

EXAMPLE 1 · REGULATED UTILITY

The risk nobody had ever priced.

CONSERVATIVELY, EVERY YEAR

\$150,000

WHAT PROPHIX WAS DOING

Building the historical data and forecasts behind every rate submission. Auditable, reconciled, defensible.

WHAT WAS AT STAKE

If the numbers are successfully challenged, the governing body can reduce their authorized revenue for the entire rate period

WHAT NOBODY HAD ASKED

What is it worth, every year, that these numbers hold up?

EXAMPLE 2 · LEE COMPANY

The value doesn't stop at your desk.

Clean, auditable financial data is read by people outside finance. And that perception has a dollar value.

The bank

Lenders read the package before they price the deal.

The auditors

Discrepancies disappeared before they had to ask.

The bonding company

Stronger numbers raised the ceiling on what they could bond.

The Captive insurance program

Acceptance into a program not every company qualifies for.

Better interest rates

Higher bonding capacity

Captive program acceptance

EXAMPLE 3 · LEE COMPANY

Financial ownership, taken seriously.

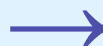
When the people running the business can see, and own, the financial performance of their specific area, the math of the business changes.

AT GO-LIVE

4

P&Ls

One per business unit, set from the top. Cost overruns met with blanket freezes.



BY THE TIME OF THE INTERVIEW

293

P&Ls

100+ owners. Each managing one to ten P&Ls. Each reviewing their own variance every month, against a plan they helped build.

HOME SERVICES DIVISION

Double-digit growth · seven consecutive years.

“There is no doubt in my mind.”

Lauren Painter, VP Finance

on whether use of Prophix contributed to the growth.

THE ARTIFACT

Your story about yourself. In your words.

WHAT YOU WALK AWAY WITH

**The interview is the method.
What you walk away with is a
document.**

Interactive

Branded

Quantified

Shareable

ON SCREEN, NEXT

**Live walk-
through**

WHAT YOU WALK AWAY WITH

Three things. Plainly stated.

DELIVERABLE

An artifact you can hand someone tomorrow.

Branded, interactive, quantified, owned by you. Your CFO. Your board. The new hire on day one.

NARRATIVE

A story that holds up under scrutiny.

Quantified. Grounded in your own data. Defensible. Not a marketing narrative wrapped around a number.

POSTURE

The confidence to have the conversation you've been avoiding.

You knew the value was there. Now you have the receipts to assert it in the moments that count.

That's Proof.

BEFORE YOU LEAVE

The handout. Side A.

PROOF AND POSSIBILITY • PROPRIX LIVE 2024 • SIDE A

 **Proprix**

PROOF
ROI Interviews at Proprix

Use this to take stock of the value your team is already generating. The more clearly you can articulate it, the more visible it becomes to the people who need to see it.

EVERYTHING YOUR TEAM USES PROPRIX FOR. START BROAD, DON'T FILTER.
Use cases, features, processes, small tasks you've stopped noticing if Proprix touches it, write it down.

PICK THE MOST IMPORTANT ONE AND KEEP ASKING: SO WHAT?
We do X, so what? That enables Y, so what? Keep going until you land on something a CFO or board would care about.

WHAT HAS PROPRIX HELPED YOU AVOID, PROTECT AGAINST, OR PREVENT?
Bad decisions, missed deadlines, audit findings, regulatory exposures, covenant breaches, What would have gone wrong without this?

WHO OUTSIDE FINANCE DEPENDS ON WHAT PROPRIX PRODUCES, AND WHAT DO THEY DO WITH IT?
Budget managers, leadership, board, auditors, lenders. What do they receive, and what does it drive for them?

WHAT CORPORATE OR STRATEGIC OBJECTIVES IS YOUR WORK IN PROPRIX ACTIVELY SUPPORTING?
List them. Leadership may not have connected the dots yet between what you're doing here and what the organization is trying to achieve.

HOW WOULD YOU BEGIN QUANTIFYING THE VALUE OF THE MOST IMPACTFUL ITEMS ABOVE?
Not a final number. Where would you start? Time recovered, risk avoided, a decision that changed an outcome?

proprix.com

Email this to your CSM to get started. Not sure who yours is? Email mikaroblaivick@proprix.com

01 Take the handout with you.

02 Find ten minutes before you leave the event.

03 Snap a photo. Email it to your CSM.

WHAT YOU JUST PROVED

**The value you have
already built.**

WHAT'S STILL AHEAD

**The value you haven't
unlocked yet.**

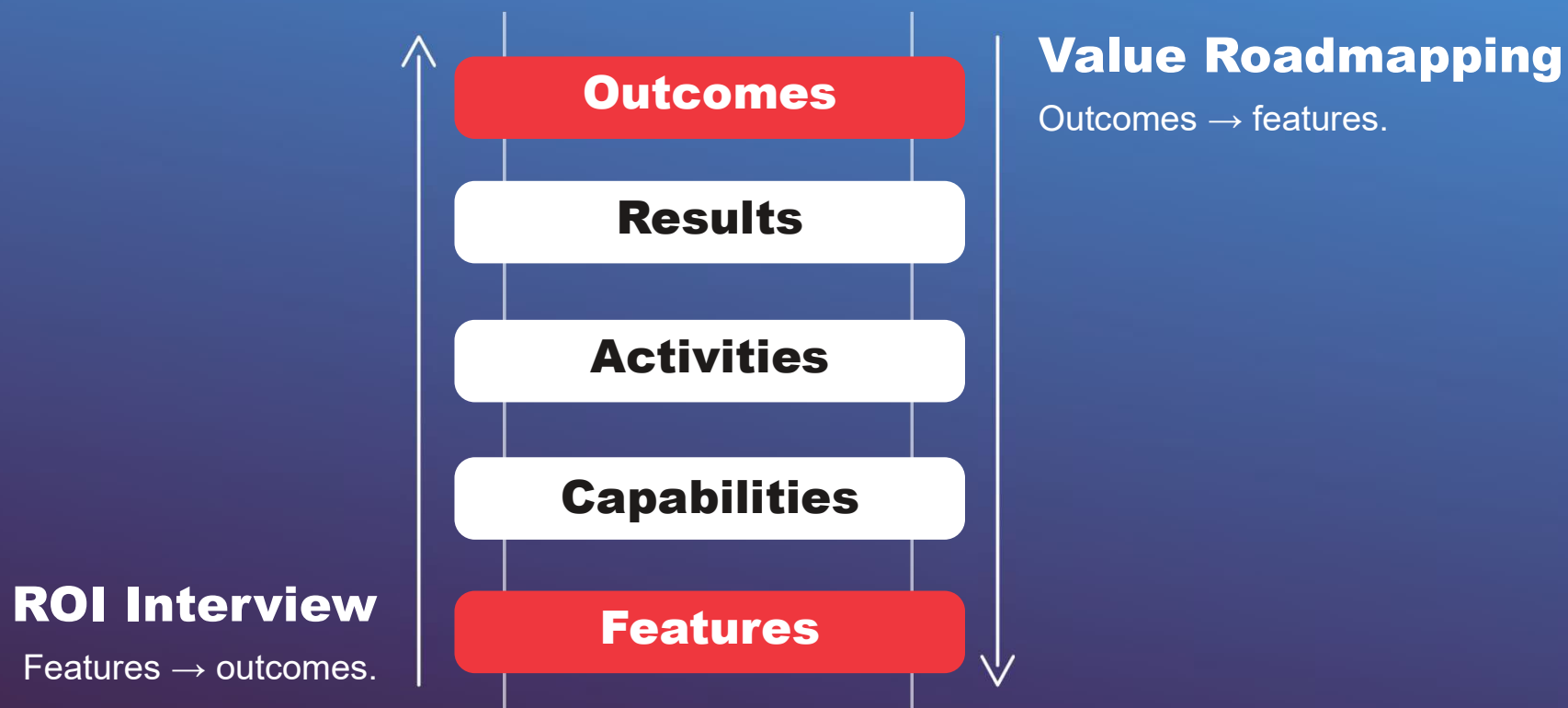
From Proof. To Possibility.

CHAPTER TWO

Possibility.

The value you haven't yet unlocked.

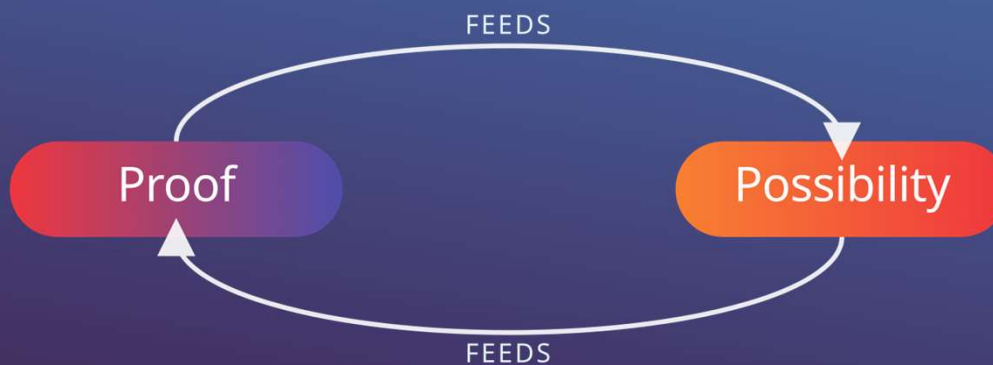
[LOOKS FORWARD →](#)



Same ladder. Opposite direction.

THE ONE FAILURE STATE

Either direction is winning. Standing still is not.



THE STARTING QUESTION

Change the question. Change the conversation.

A PRODUCT QUESTION

~~“What does Prophix do?”~~

Has a finite answer. Leads to a feature tour. Ends in a module list.

vs.

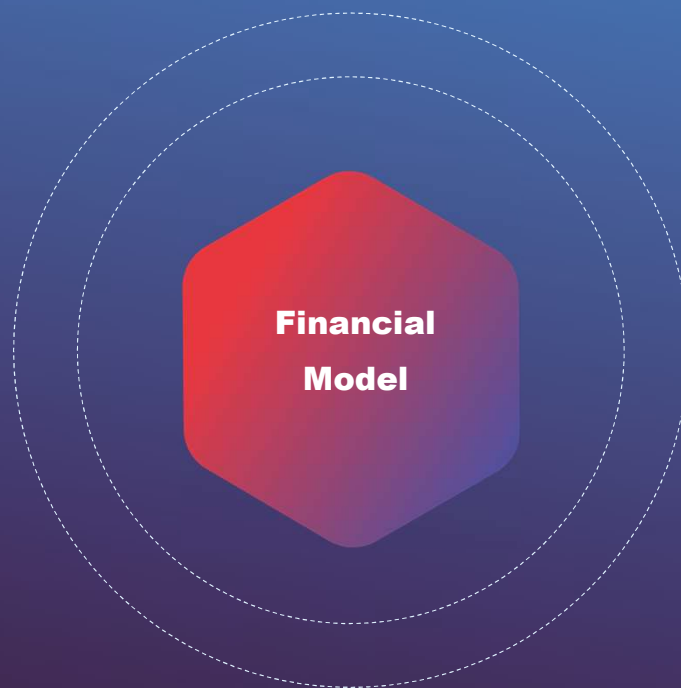
A BUSINESS QUESTION

“What does my business need?”

Open-ended. Leads to a roadmap. Starts a conversation about problems worth solving.

PHASE ONE · GO DEEPER

You already have the foundation.



EXAMPLE

Value Roadmapping in Practice.

THE ASK

Scenario planning.

One objective.
One sentence.

SESSION 1

WHAT THE ROADMAP BUILT

Three deliverables.

- 01** Scenario planning with adjustable drivers: sales, COGS, labor.
- 02** A full cash flow template with year-over-year change logic.
- 03** An ERP-based sales report, rebuilt natively in Prophix.

SESSIONS 2 – 4

NEXT CHAPTERS - ALREADY ON THE TABLE

Brought to us before we asked.

- A personnel cube flagged for a model audit.
- A scorecard refresh, for the CFO who just started.

THE ROADMAP KEEPS GOING

A good road mapping engagement doesn't close with a completed checklist.
It closes with the customer already thinking about what comes next.

BRAINSTORM · HANDOUT SIDE B

Are you getting everything out of what you already have?

01

What question does the business ask over and over that takes too long to answer?

02

Who should be seeing this data but isn't?

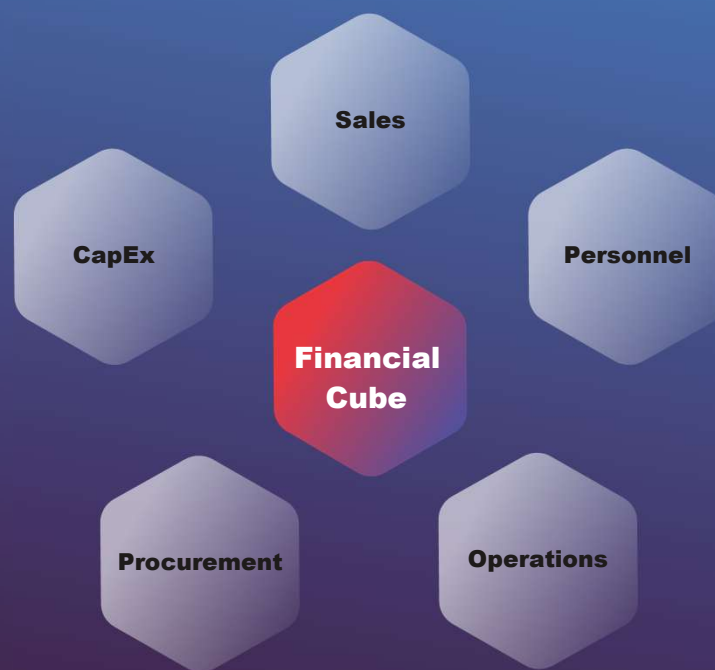
03

What would leadership ask from your current models if anything was possible?

**Prompt 1
45 seconds**

PHASE TWO · EXPAND INTO NEW TERRITORY

The hub-and-spokes concept



A new model every morning.

AUTO-REBUILT DAILY

THE PAIN

Same order shipped three times. Three times the freight.

THE TWIST

Every morning at 5 AM, the model wipes its dimension members and rebuilds from today's open orders.

THE OUTPUT

A daily ship list with green / amber / red status, so shipping never has to guess what's complete.

05:00 AM TODAY'S SHIP LIST

Acme Industries SO-44102

12 of 12 lines picked · Order complete · ship today

SHIP

Northstar Manufacturing SO-44119

11 of 12 lines picked · 1 line back-ordered · hold the pallet

WAIT

Bridgepoint Co. SO-44086

9 of 9 lines · due Friday · Past due · escalate today

LATE

Riverview Group SO-44137

8 of 8 lines picked · Order complete · ship today

SHIP

Frontrunner Hardware SO-44204

3 of 14 lines picked · Pallet not full · don't ship piecemeal

WAIT

Stopped paying freight three times for one order.

QUICK SHOW OF HANDS

Who has so much data it makes your eyes water?

THE OLD PROBLEM - SOLVED

~~We have a data problem.~~



THE REAL PROBLEM NOW

We have a sense-making problem.

The data is everywhere. The question is which problem is worth solving first. And which data is relevant to it.

BEFORE YOU PLAN A SOLUTION

Find the friction.

DENISE FEECE, CFO, SEQUEL WIRE AND CABLE · 40 CUBES AND BEYOND · 19:25 – 21:56

Listen for the moment the warehouse manager walks in.



AFTER THE MOMENT

What that moment produced.

THE ASK

"I just need help. I don't know what to do with this data."

WHAT DENISE BUILT

A daily report that blended warehouse-management transactions with ADP time-clock data. One efficiency number for yesterday, broken down by personnel.

WHY IT MATTERED

He walked in with an unformed problem and walked out with a number he could lead his shift with.

AUTO-REBUILT DAILY

06:30 AM

80% efficient

WMS productive hours ÷ ADP clocked hours

EFFICIENCY BY PERSONNEL



An unformed problem became a daily decision tool.

Who is your warehouse manager?

THE QUESTION ISN'T

“What do you want to build?”

THE QUESTION IS

“Who do you need to bring into the conversation?”

ON YOUR HANDOUT · WRITE

A name

A role

A department

FROM IDEA TO PLAN

The hard part is already behind you.

WHAT YOU JUST DID

Named a problem worth solving. And named who owns it.



WHAT COMES NEXT

Turn it into a plan, with someone who has done this hundreds of times.

VALUE ROADMAPMING · WHAT TO EXPECT

One session with a Solution Architect.

Your Solution Architect walks five focus areas with you to find where Prophix can do more for your business than it does today.

01

Business profile

Your industry, operating model and org structure.

The roles using Prophix today and those we could bring into the conversation.

02

Model audit

A fresh look at the models, templates, and processes already in place.

What's working, what's drifted.

What's quietly holding you back or could be further optimized..

03

Challenges & new requirements

Where things still feel manual.

The asks from leadership that take too long to answer.

04

Industry best practices

How customers like you have used Prophix to solve the same problems.

Patterns you can borrow rather than invent.

05

Your roadmap

A prioritized plan.

Highest-impact moves first.

We agree the next steps in the room and start tackling them right away.

60-80 minutes

Hosted by a Prophix Solution Architect. Included for all CSP customers.

ZOOM IN · THE MODEL AUDIT

A health check for the model you've stopped seeing.

Businesses evolve. Teams change. How your model was originally built often doesn't match how you work today. A consultant takes a structured look under the hood at cubes, dimensions, templates, and processes.

1 Drift

Models, templates, and processes built for the business you used to be, not the one you are now. Quietly more complex than they need to be.

2 Performance

Cubes, dimensions, or calcs that have started to drag, making the system feel heavier than it should, often for reasons no one in the room remembers.

3 Workarounds

Manual steps that have become routine. Usually because a built-in capability already does the job, and nobody told you it shipped.

WHEN TO ASK FOR ONE

The system feels slow.

The admin role changed hands.

The business grew or restructured.

"I don't think we're using this the right way."

Three things you walk out with.

CAPTURED WHERE THE WORK LIVES

All of it lands in your support ticket.
The working doc that tracks
progress and houses the
conversation as the roadmap
moves.

01 **Clarity**

A shared read on what's getting in the way. And which areas are most worth opening first.

02 **A prioritized roadmap**

Candidate problems ranked by impact and effort. Not a list of products. A sequence of moves.

03 **A first move**

One specific thing to start inside thirty days. Owner named, scope defined, success criteria written down.

BEFORE YOU LEAVE THE ROOM

Your next step takes ninety seconds.

SIDE A · PROOF

ROI Interview

SIDE B · POSSIBILITY

Value Roadmapping

FILL THE HANDOUT · PHOTOGRAPH · EMAIL YOUR CSM

Not sure who to email?

Send it to me and I'll connect you — mkoronkiewicz@prophix.com

Thank you

QUESTIONS · THE FLOOR IS YOURS



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

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