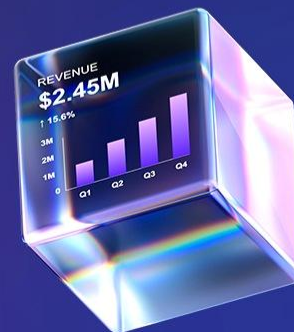




Autonomous Finance Realized

Welcome to the Delegation Era



Smarter Personnel Planning: Powered by Prophix DPM

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Business Analyst

Professional Services





Agenda

1 The Core Struggle

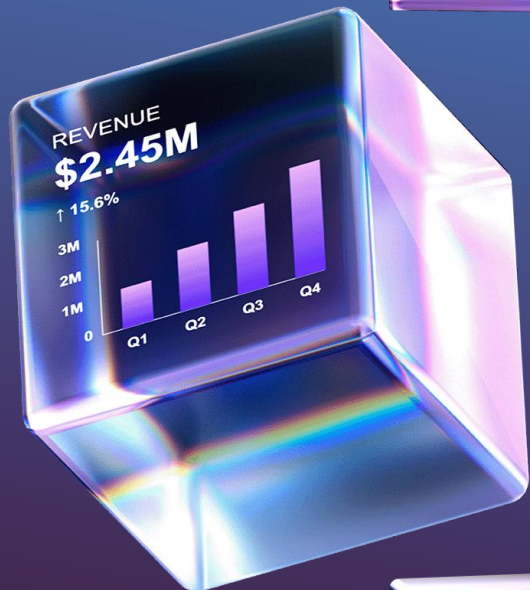
2 Costs of Static Model

3 Modern Planning Requirements

4 What is DPM?

5 DPM in Action

6 Unlocked Insights That Drive Decisions



The Core Struggle



Difference in Perspectives

Finances Perspective

Focused on cost control, labor spend, and margin targets

- "What does this cost the organization?"
- Budget vs. Forecast variance tracking
- Headcount caps and labor cost guardrails
- Protecting margins through personnel spend

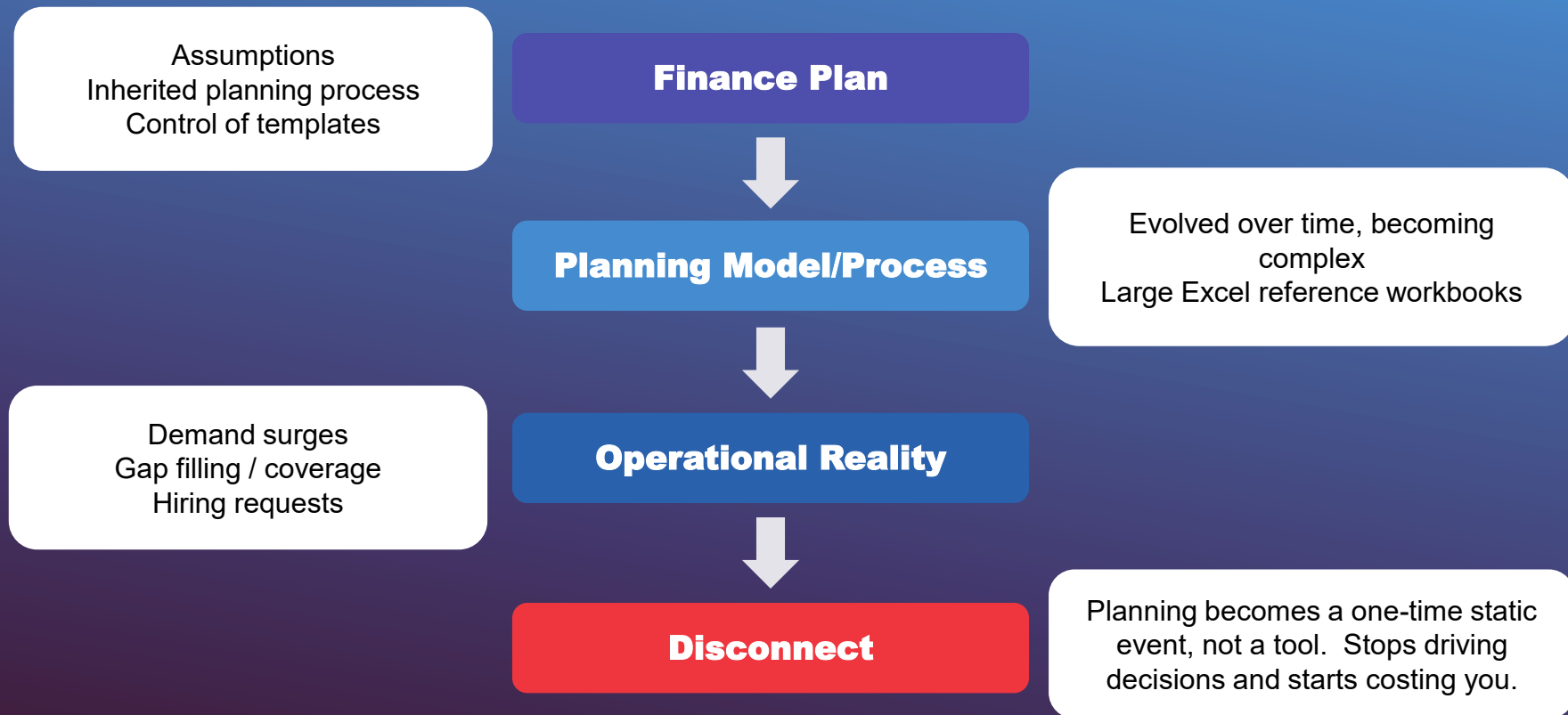
Operations Perspective

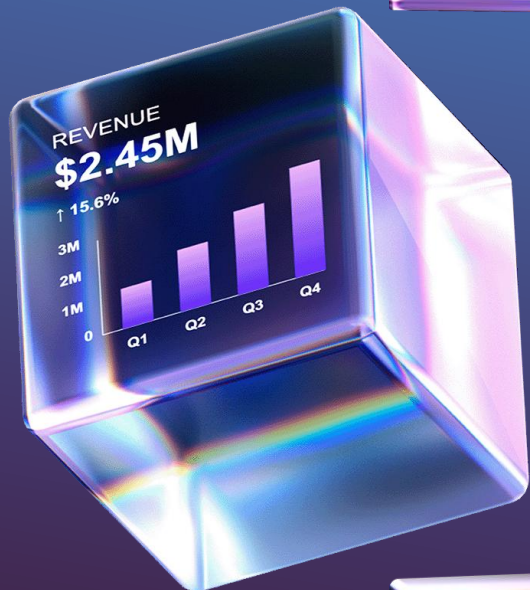
Focused on having the right people to meet demand

- "Can we staff to meet demand?"
- Hiring to fill gaps vs. building capacity
- Turnover, promotions, and role transitions
- Adapting to seasonal and volume swings



Why Teams Don't Align





Costs of a Static Model



Time Wasted



Chasing Data

Hunting down the latest headcount file across email and shared drives

Reconciling versions when finance, HR, and ops each have their own copy



Rebuilding Model

Re-linking broken formulas after every org change

Patching templates when a new role, department, or location is added



Updating the Plan

Large data collection process to update a single assumption

Rebuilding the forecast from scratch every time leadership asks, "what if?"

Margin Impact



Hiring \neq Demand

Roles funded but unfilled, sitting in the plan as committed cost

Contractor's filling gaps at 2–3x the cost of the role you didn't backfill

Severance and rehire costs from over-hiring early in the year



Revenue Leakage

Hiring trails demand, leaving billable capacity on the table

Sales or service teams understaffed during peak periods



Margin Visibility

No early warning when productivity drops or unit cost rises

Finance can't show ops the margin impact of a hiring decision before it's made

Flying Blind



Conflicting Numbers

Finance and ops bring different headcount totals to the same meeting

Variance reports take days to reconcile

Leadership doesn't know which number to trust



No What-If Capability

“Can we add 5 reps in Q3?” takes a week to answer

Hire vs. contract, full-time vs. part-time can't be modeled side by side

Decisions get made without data backing

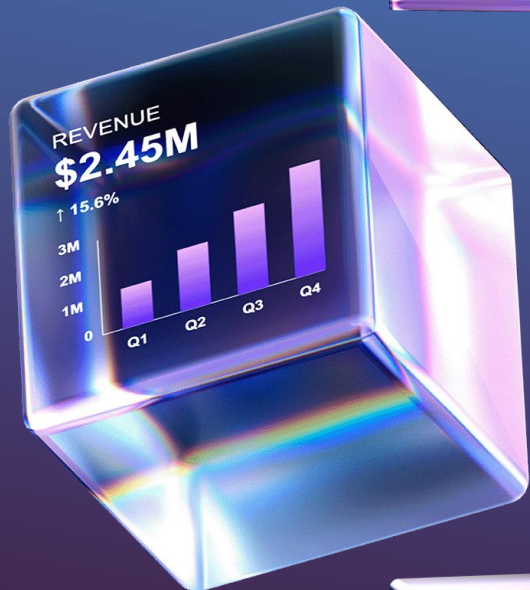


Plan Loses Trust

Forecast sign-off slips because no one believes the model

Within 30 days, the plan is shelved

Operations stops engaging — finance plans alone, ops staffs alone



Modern Planning Requirements



How do you plan smart?

Demand-Driven Planning

Staffing tied to real activity, not last year's budget

Rolling Forecasts

Plan updates as conditions change, forecasts and budget stay relevant

Scenario Analysis

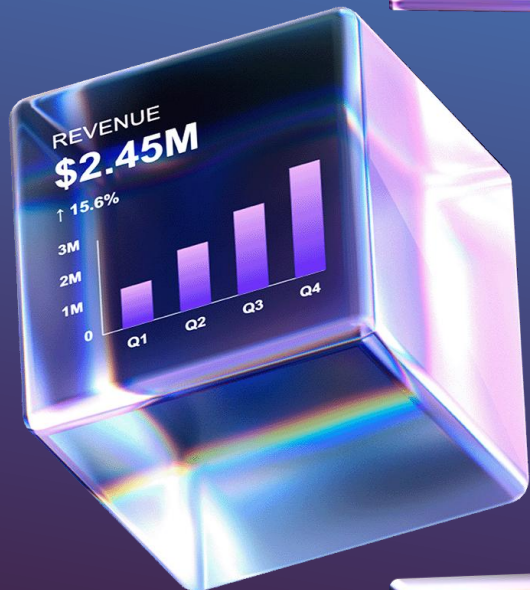
Compare hire / contract / cut decisions

Help analysis impact before proceeding

Data Reporting & Analysis

Track cost-per-head, utilization, attrition

Spot trends before they become problems



What is DPM?



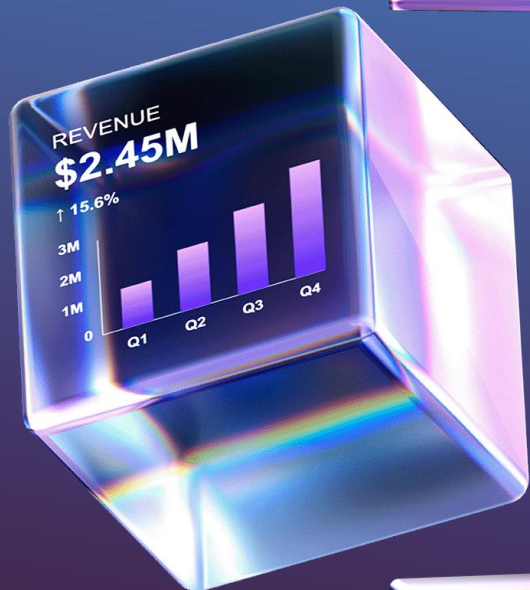
DPM (Detailed Planning Manager)

DPM is a Calculation Engine for Driver-Based Planning

Purpose:

- Enables bottom-up planning at a granular level based on planning object
- Built for scenario modeling
- Easily update budget with new calculated outputs
- Set up assumptions, logic, and drivers to calculate the desired budget
- Adaptable and flexible





DPM in Action



Demand-Driven Planning

- Personnel plan tied to output volume, activity, or services provided
- Helps accurately plan for seasonality and visualize the effect across budget
- Link staffing requirements directly to revenue forecasts, project pipelines, or customer demand signals
- Rolling forecasts powered by live actuals from ERP and GL keep demand assumptions current
- Drill through from aggregate views to department-level staffing detail
- Automate headcount recommendations based on volume and utilization thresholds

Rolling Forecasting

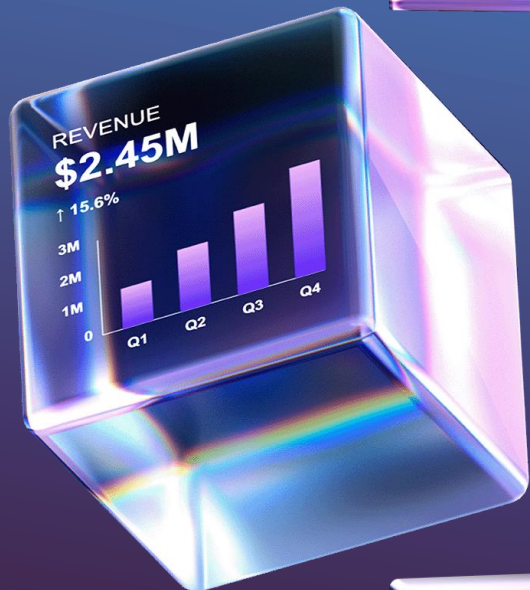
- Adjust assumptions in real time without rebuilding the plan from scratch
- Update headcount and cost models as business conditions evolve throughout the year
- Enable finance and operations to respond quickly to changes in demand, attrition, or hiring freezes
- Maintain a living plan that reflects current reality rather than outdated budget assumptions
- Support mid-cycle reforecasting with minimal effort using driver-based logic
- Empower department managers to model local changes without breaking the consolidated plan

Scenario Capability

- Evaluate multiple outcomes quickly and consistently across the organization
- Compare hiring, restructuring, or cost-reduction scenarios side by side
- Quantify the financial impact of personnel decisions before committing
- Run what-if analyses across departments, roles, or time horizons in minutes
- Stress-test plans against optimistic, baseline, and conservative assumptions

Data Reporting & Analysis

- Track cost-per-hire, utilization rates, and labor cost as a % of revenue
- Embed productivity and efficiency metrics directly into the planning model
- Monitor attrition trends and forecast replacement costs automatically
- Compare planned vs. actual headcount and cost variance by department
- Surface overtime patterns and staffing imbalances before they impact margins
- Drill from organization-wide KPI dashboards into role-level detail



Unlocked Insights That Drive Decisions



Unlocking Valuable Insights for Decisions

Dashboards & Visual Model

Trends, variances, and KPIs at a glance

Drill Through Analysis

Navigate from summary to detail to find root causes

Scenario Analysis

Compare what-if outcomes side by side

Decision Metrics

Ratios that connect personnel plans to financial goals

Inform Operations

Bridge insights to operational leaders

Thank you

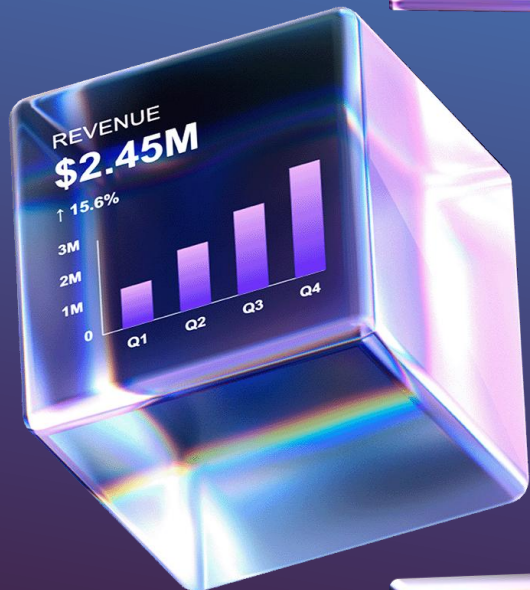


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Q&A



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