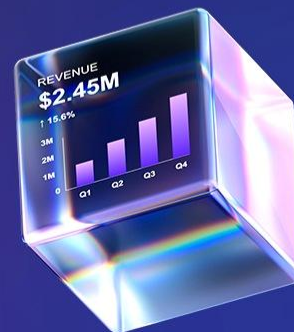




Autonomous Finance Realized

Welcome to the Delegation Era



Advanced Planning on FP&A Plus

Unlocking Precision at Scale



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Housekeeping



Earn 1 CPE Credit

Answer poll questions and complete the post-event survey to be eligible. QR code at the end of the presentation.



Q&A

Q&A is at the end, but feel free to ask questions throughout the presentation.

Audience Poll # 1

POLL

Poll 1 — Current Usage / Value

Where do your business users get the most value from Prophix today?

- Financial reporting
- Budgeting and forecasting
- Variance analysis
- Departmental planning
- Executive dashboards/analytics

Why you're here today

1

You're being asked to do more with finance

Expanding reporting needs, faster executive insights, more stakeholders to support — all with the same team.

2

Your business is getting more complex

More entities, acquisitions, and sophisticated planning — current models are difficult to manage and scale.

3

You're hitting limits with your current setup

Slow reports, manual workarounds, and difficulty scaling models, users, and data volumes.

4

There's pressure to modernize with AI

Leadership is asking about AI — static reports need to become dynamic, real-time insights your team can act on.

5

You're asked to scale — without more headcount

More work with the same team. The answer isn't hiring — it's automating the work that shouldn't require a person.

6

You want to unlock more value from Prophix

Drive broader adoption beyond the finance team and enable self-service for business users across the org.

2025 was the Year Finance Finally Ran Out of Time

64%

of Finance teams are held back by manual work and data Issues¹

41%


of CFOs have a high level of confidence in their organization's ability to navigate current economic challenges, indicating constrained decision-making capacity.²

76%

of financial leaders are concerned about security and privacy risks when adopting AI⁴

87%

of CFOs say AI will be extremely or very important to finance operations in the near term³

 Finance wants to be at the strategy table, but the team is buried in data processing and slow operations. This isn't just inefficiency—it's missed opportunity.

The Comparison

Most Suitable For	Prophix One Financial Planning & Analysis	Prophix One FP&A Plus
	Core budgeting, forecasting, and reporting.	Integrated planning with larger volumes of financial and operational data.

Use Cases		
Department-level Planning Budgeting and forecasting at department level	✓	✓
Basic Reporting and Scenario Analysis Across standard dimensions	✓	✓
Complex Planning, Budgeting and Reporting By SKU, region, and cost code. By specific timeframes and granularity (daily, hourly, etc.)		✓

Capability Enhancements	Prophix One Financial Planning & Analysis	Prophix One FP&A Plus
Standard Dashboarding and Charts Visualize results through standard dashboards and reports.	✓	✓
Embedded Predictive Forecasting Improve forecast accuracy with predictive modeling.	✓	✓
Embedded Chart Insights Surface insights directly within reports & dashboards.	✓	✓
Advanced Dashboarding and Charts Visualize results through powerful dashboards and advanced reports.		✓
Prophix One Copilot* Ask questions in plain language and get instant answers, with Prophix One Copilot.		✓
Prophix One AI Agents* Automate budgeting, reporting, modeling, and close workflows with the Prophix One Agents.		✓



Download the full Comparison Guide

Take your planning to the next level

An In-Depth Look at Prophix Infinix

The Engine that powers Prophix One™ FP&A Plus



The game-changing FP&A solution at scale

Prophix One FP&A Plus is a game-changing solution for financial planning and analysis, built on the foundational pillars of next-generation finance technology.

These pillars—**hyper precision**, **ultra adaptability**, and **dramatic performance**—allow you to strengthen different aspects of your FP&A processes.



Data processing

In-memory processing

In-memory processing is a computing approach where data is stored in the memory (RAM) of multiple servers or nodes in a distributed network, rather than on slower disk storage. This enables faster data access and computation, as operations are performed directly in-memory across various servers simultaneously.

What it means for you:

In-memory processing speeds up real-time calculations in cloud-native FP&A solutions, enhancing performance and cutting down latency for large datasets like budgets and forecasts.

Optimized data compression

Optimized data compression is a technique used to reduce the size of data while maintaining its integrity, allowing for faster processing and reduced storage requirements. In the context of an FP&A solution, optimized compression enables large datasets, like financial models, to be stored and processed more efficiently. This results in faster query response times and improved performance, especially when handling massive datasets.

What it means for you:

Optimized compression lets you handle large volumes of financial data quickly during budgeting and forecasting, ensuring fast analysis and more efficient decision-making.

Resource scaling

Containerized elastic resource scaling by workload

Containerized elastic resource scaling by workload uses containerized technology to dynamically allocate computing resources to the model being processed. Containers encapsulate the workload, allowing for isolated and scalable environments. This ensures that resources (CPU, memory, etc.) expand or contract depending on demand.

What it means for you:

Automatic resource scaling addresses processing demands, enhancing analysis speed and efficiency while improving cost-effectiveness.

Database optimization

Column store and bitmap indexing

Column store and bitmap indexing are database optimization techniques designed to enhance query performance. More specifically:

- Column store organizes data by columns instead of rows, making it faster to retrieve specific fields across large datasets.
- Bitmap indexing uses bitmaps (binary representations) to quickly filter large datasets by specific values, significantly speeding up search and filtering operations.

What it means for you:

Fast querying and reduced processing times greatly enhance real-time analysis.

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

Workforce & Capacity Planning

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

Advanced Scenario Modeling

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

End-to-End Revenue Planning

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

Supply Chain & Production Planning

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

Customer & Analyst Validation



*“I use **Copilot 80–90% of the time**. It consistently makes it easy to get exactly what I need right away. It’s helped us move from reactive reporting to proactive planning. **It’s streamlined the way we work** and given our team more confidence, independence, and speed.”*

Mandy Huynh - Business Intelligence Analyst, KBL Environmental



*“It’s likely many of those organizations will require **more complex modeling and analytics** support as they scale and increase workloads. **Prophix One FP&A Plus** addresses that need, providing the architecture necessary to process large datasets quickly, frequently, and with a high degree of granularity.”*

Craig Schiff – Founder & Lead Analyst, BPM Partners



*“With **Prophix Copilot** it essentially gives every one of my program directors their own **personal financial analyst**. Prophix didn’t just share an AI vision — they delivered on it.”*

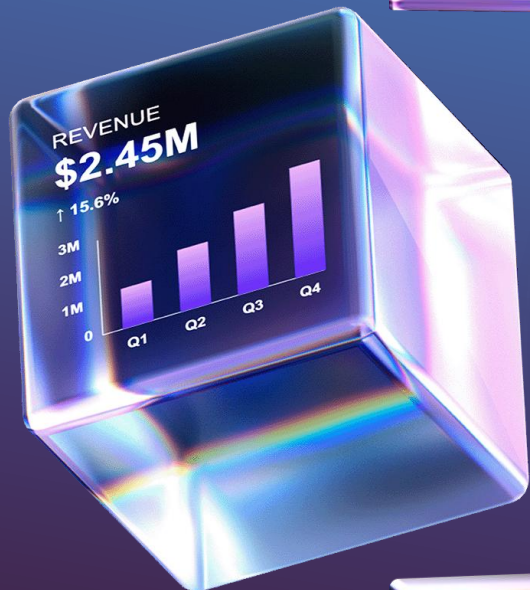
Eric Naughton – CFO
View Point Health

Audience Poll # 2

POLL

What level of detail best describes your planning process today?

- Primarily GL/account-level budgeting
- Department-level operational drivers
- Workforce/headcount planning
- Sales or revenue driver modeling
- Integrated operational + financial planning



Industry Solutions



Prophix One Intelligence

Agentic Intelligence

Budgeting Agent – Updates budgets through natural-language prompts ●

Reporting Agent – Generates reports, charts, and insights from plain-language prompts ●

Reconciliation Agent – Monitors close progress and streamline close tasks. ●

Architect Agent – Automatically designs financial models using ERP data and reports. ●

Consolidation Agent – Validate totals, spot exceptions, and answer consolidation questions instantly ●

Prophix Copilot for MS Teams – delivers AI-powered financial insights and actions directly within Teams. ●



Generative Intelligence

Contribution Insights – Explains changes in data across periods and versions ●

Chart Insights – Creates written takeaways on charts ●

Report Insights - Writes line-item commentary within reports. ●

Conversational Intelligence

Knowledge Assistant –Answers “how-to” questions ●

Task Assistant – Performs finance tasks through natural language ●

Predictive Intelligence

Predictive Forecasting – Projects outcomes and trends using historical data ●

Applied Intelligence (AR)

Transaction Matching – Automatically reconciles transactions ●

Audience Poll # 3

POLL

If you could improve one aspect of your planning process, what would it be?

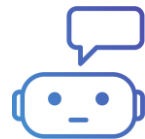
- More detailed modeling
- Faster forecasting cycles
- Better cross-functional collaboration
- More real-time operational insights
- Less manual data preparation

What you can do next



Check your current plan

Agents are available on FP&A Plus and select Prophix One packages. Your Customer Success Manager can confirm your eligibility in minutes.



Talk to your CSM

Reach out to your Customer Success Manager to discuss potential use cases you'd like to bring into Prophix.



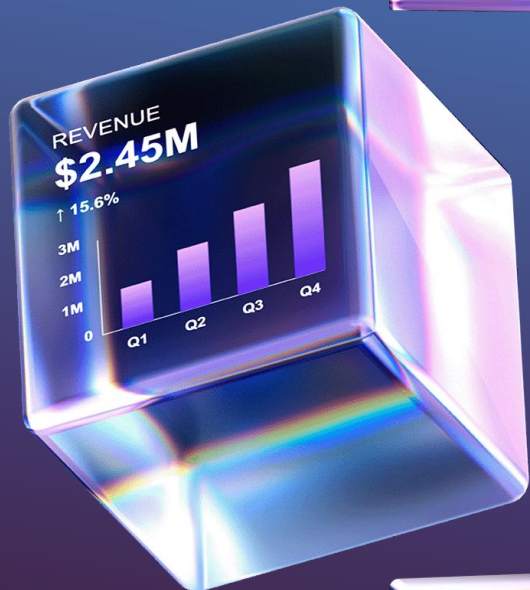
Join the Industry Peer Groups Tomorrow

Don't start with everything. Pick one high-impact data set that your considering modelling in Prophix, let's discuss it along with your peers on how that data can be better used for planning



Book a Model Audit

Once your team sees the first Agent in action, the use case list builds itself. Your CSM can help you prioritize what to activate next.



Any questions?



Thank you



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

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