

# 4 PLANNING METHODS PERFECT FOR YOUR GROWING COMPANY

(HINT: THEY DON'T INCLUDE SPREADSHEETS)



41% of companies use an ERP system to handle transactional processing and spreadsheets for planning, budgeting, and forecasting.<sup>1</sup>



Spreadsheets are static. They struggle to support 4 dynamic planning methods that drive growth—planning made easy through **ERP + EPM TOGETHER**.

## 1 DRIVER-BASED PLANNING

FOCUSES ON ACTIVITIES THAT DRIVE PERFORMANCE:



ONE BIG BENEFIT:



UNDERSTAND AND INFLUENCE THE CRITICAL ELEMENTS THAT IMPACT FINANCIAL PERFORMANCE.<sup>2</sup>

SPREADSHEETS STRUGGLE WITH:



LARGE AMOUNT OF DATA THAT MUST BE CONSOLIDATED AND ANALYZED



LARGE # OF COMPLEX EQUATIONS THAT ARE NEEDED FOR EACH SPREADSHEET<sup>3</sup>

THE RESULT? LOTS AND LOTS OF ERRORS.

## 2 ROLLING FORECASTS

 **64%**  
OF ANNUAL FORECAST TARGETS ARE OBSOLETE AFTER 4-6 MONTHS<sup>4</sup>



BENEFITS:  
SPEED & AGILITY

Finance has a much clearer view, can revise forecasts and budgets in real-time based on current information, and conduct “what-if” analyses.

SPREADSHEETS STRUGGLE TO SUPPORT THAT LEVEL OF SPEED AND AGILITY (AND ACCURACY).

AVG % OF SPREADSHEETS WITH ERRORS<sup>5</sup>

**94%** 

HARD-CODING ERRORS<sup>5</sup>

**38%** 

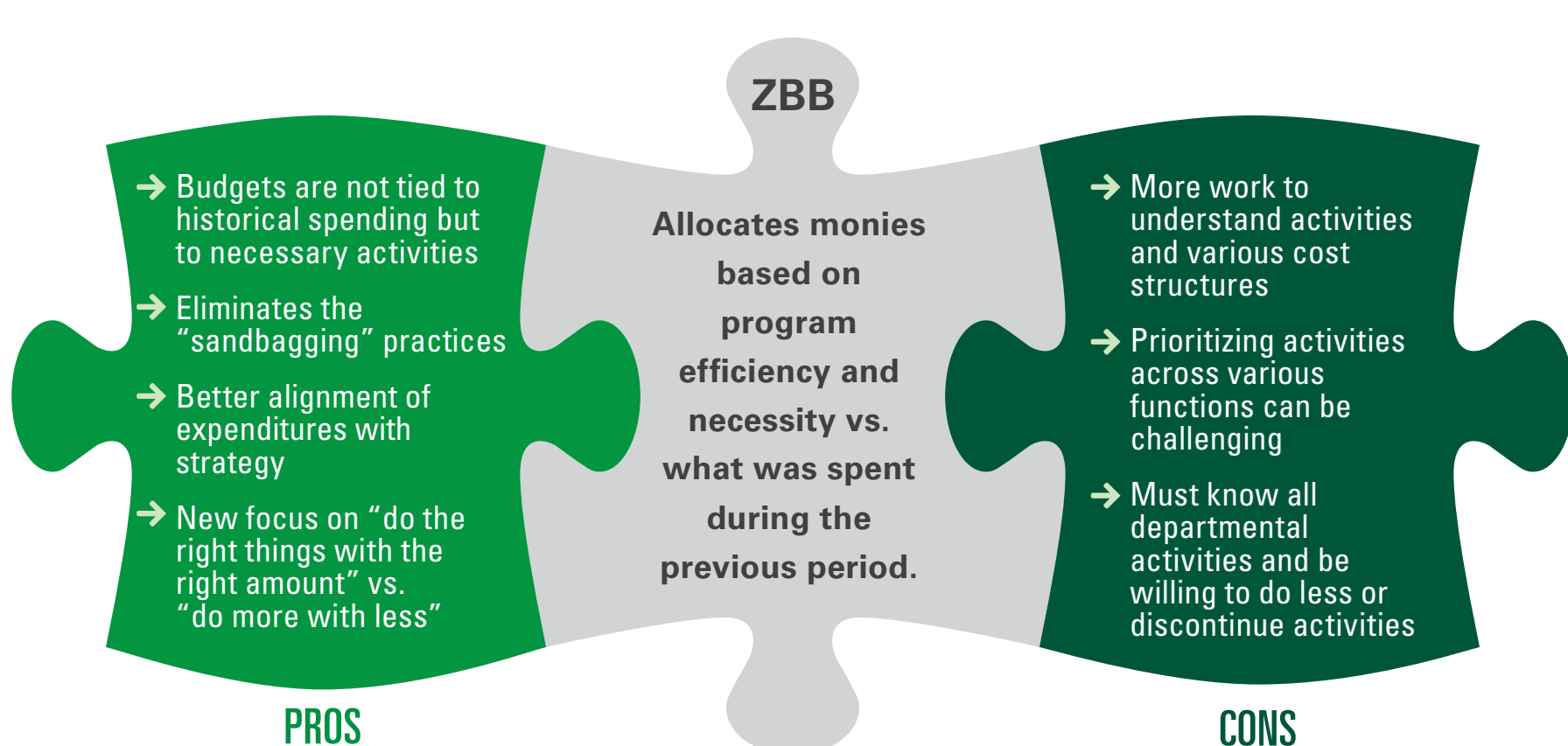
REFERENCE ERRORS<sup>5</sup>

**33%** 

LOGIC ERRORS<sup>5</sup>

**23%** 

## 3 ZERO-BASED BUDGETING (ZBB)



SPREADSHEETS MAKE ZBB TIME CONSUMING AND DIFFICULT, SINCE THEY STRUGGLE TO SUPPORT:

- FASTER AND MORE ACCURATE REPORTING
- IMPROVED TRANSPARENCY
- CLEAR OWNERSHIP OF BUDGETING RESPONSIBILITIES

## 4 LONG-RANGE PLANNING & FORECASTING

SPREADSHEETS CAN FORECAST OUT 2 TO 3 MONTHS, BUT STRUGGLE WITH LONGER TIME PERIODS.

RED FLAGS THAT SPREADSHEETS NO LONGER WORK:

- No one trusts the data. → **Q:** How many different versions of spreadsheets do you have saved?
- Cannot drill down behind top-line #s. → **Q:** Can you make decisions quickly?
- Poor modeling capabilities. → **Q:** Are your forecasts and budgets accurate? Do you feel like you are “flying blind?”

2 WAYS TO HANDLE PLANNING AND BUDGETING

ERP CLOUD & EPM CLOUD OR ERP CLOUD & SPREADSHEETS

BOTH CAN PLAN, BUDGET, AND FORECAST AND PROVIDE DATA TO STAKEHOLDERS, BUT ONLY ERP CLOUD + EPM CLOUD IS



**FAST**



**STANDARDIZED**



**ACCURATE**



**COLLABORATIVE**

STOP THE STRUGGLE WITH SPREADSHEETS. DOWNLOAD OUR NEWEST EBOOK

**WHEN ERP AND SPREADSHEETS STRUGGLE. TRANSFORM FINANCE WITH INTEGRATED ERP AND EPM.**

**ORACLE®**

Sources:  
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