



Rocket® CorVu CorPlanning

Maximize participation, communication, and ownership during the budgeting and planning process

Create a financial plan that resources and supports your strategic plan

Reduce the cost, time, and effort required to compile the annual budget, as well as to produce reports, financial dashboards, and briefing books

Reverse the typical 80/20 input/analysis ratio for the budgeting and planning process

Analyze the business impact of hypothetical scenarios in real-time

Quickly react to market, competitive and organizational changes

Eliminate consolidation of different budget versions, re-keying of data and errors, through centralized data entry

Automate, Simplify, and Control Your Budgeting and Planning Processes

While all organizations—whether in the private or public sector—have some sort of annual budgeting and planning process, it’s typically not tied to the strategic planning process. As a result, many organizations fail to have the appropriate resources or business processes to successfully execute strategies.

Furthermore, budgeting and planning through spreadsheets can be time-consuming, error-prone and inflexible to change. Consolidating and tracking various budget versions that are maintained by distributed budget contributors can be particularly difficult to manage.

CorPlanning is designed to automate, simplify and control an enterprise-wide planning and budgeting process. With CorPlanning, workflows can be automated, versions can be controlled and the entire budgeting process can be monitored and managed.

Most importantly, a financial plan can be maintained to support the evolving business plan—including performance targets and strategic initiatives.

Key Benefits

- ❖ Accelerate the budgeting and planning cycle
- ❖ Link planning to strategy
- ❖ Reduce operational costs
- ❖ Improve operational efficiency
- ❖ Drive profitable growth
- ❖ Improve ability to act
- ❖ Improve accuracy

Key Features

Planning Methods

- ❖ Rolling forecasts
- ❖ Zero-base budgeting
- ❖ Outcome budgeting
- ❖ “What-if” scenario modeling
- ❖ Beyond budgeting
- ❖ Top-down and bottom-up

- ❖ Activity based management/costing

Planning Templates

- ❖ Ability to develop templates for sales, cost of goods sold, eliminations, R&D, capital planning, payroll and budget

Data Collection and Consolidation

- ❖ Access to data from any source, including ERP systems, databases, XML files, and flat files
- ❖ Periodic data can be automatically loaded from other corporate information systems, submitted via email or manually entered via web forms
- ❖ Reminders, escalations, and exception reports for data not yet available

Workflow

- ❖ Elimination of manual update processes
- ❖ Automatic email notifications, reminders, and escalations
- ❖ Control submissions, approvals, and authorizations

Key Features

Communication and Collaboration

- Secure and consistent electronic communication for all budget-related content throughout the organization
- Commentary on worksheets, accounts, organizational units and actions shared with relevant stakeholders
- Link to supporting documents, hyperlinks, and personal notes, and drill-down to transaction-level detail

Accountability

- Every object is owned/maintained by a specified individual
- All budgeting and planning information is controlled in a secure, integrated environment which can be fully audited

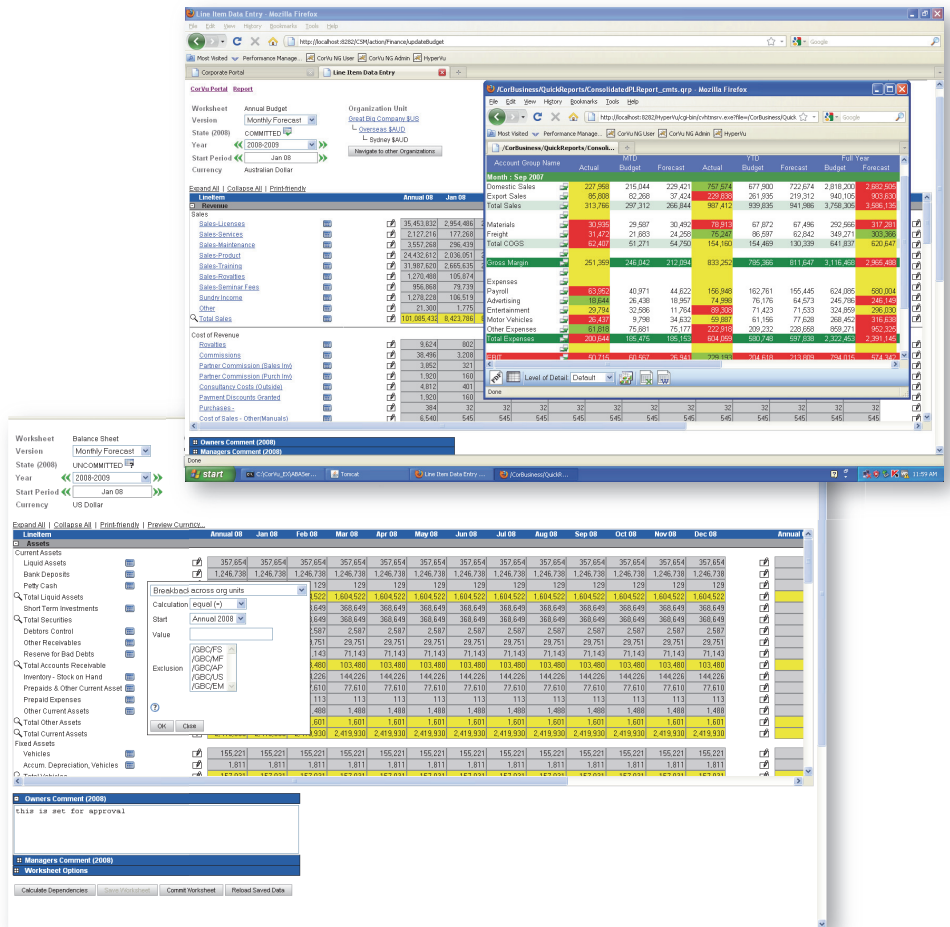
Why CorPlanning?

Comprehensive Capabilities

- Real-time planning allows changes to drive instantaneous recalculation, re-forecasting, and scorecard updates
- "Driver-driven forecasting" enables business drivers to improve forecast timeliness, accuracy, and flexibility
- Powerful planning functions, including breakback, consolidation, inter-company eliminations, and multi-currency
- Sophisticated, granular security system supports LDAP
- Ability to populate worksheets from disparate corporate information systems

Flexibility

- Easy to change/add dimensions, models, and organization structures
- Versioning provides capability to create multiple versions for all budget years



Low Total Cost of Ownership

- Purpose-built application to minimize implementation, training, modification, and maintenance costs
- Easy configuration with no programming required
- Personalized reports and templates can be developed for re-use
- Pre-built integration to common ERP systems

Scalability

- Single, open database repository allows for efficient models and consolidation
- Java-based web architecture allows large-scale implementations

Ease of use

- User-friendly interface
- Automated calculations
- Intuitive data entry

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