

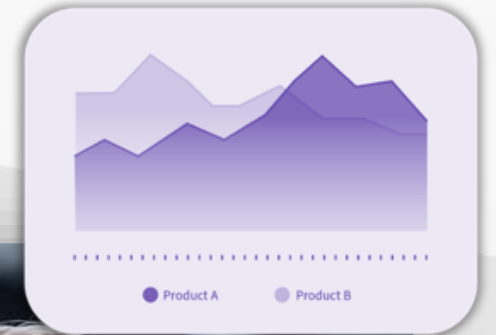


Infor **EPM**

Infor Enterprise Performance Management

# Financial Budgeting & Planning

From complexity to clarity –  
transform your planning process.



**OBJECTIVES**

# Key Challenges

Budgeting, planning and forecasting are essential processes that organizations use to drive financial strategy and operational efficiency. However, many businesses struggle with outdated, disconnected tools that hinder agility and collaboration.

Ensuring data consistency across multiple departments, managing frequent forecast adjustments, and aligning financial plans with strategic goals can be challenging. Organizations face difficulties in scenario modeling and integrating operational drivers into financial plans.

Manual spreadsheets, siloed systems and lack of automation lead to inefficiencies. These challenges slow down decision-making and increase the risk of errors and misaligned financial strategies. Businesses need a modern, automated and integrated budgeting and planning solution that enhances agility and collaboration across the enterprise.



# Our Main Capabilities

By leveraging these key capabilities, organizations can streamline budgeting and planning processes to enhance forecast accuracy, and improve financial transparency for smarter, data-driven decision-making.



## Automated Data Integration and Validation

Integrate financial and operational data from multiple data sources, ensuring accuracy with built-in validation rules and reducing manual data entry errors.



## Budgeting, Planning & Forecasting

Enables dynamic, driver-based modeling that aligns financial plans with key business drivers, improving forecasting accuracy and adaptability to changes.



## Scenario Modeling & What-if Analysis

Provides advanced scenario planning tools that allow organizations to test multiple financial strategies, assess potential risks, and make data-driven decisions.



## Collaborative & Role-based Planning

Supports decentralized, role-based planning where departments contribute to budgeting and forecasting in a controlled, secure, and collaborative environment.

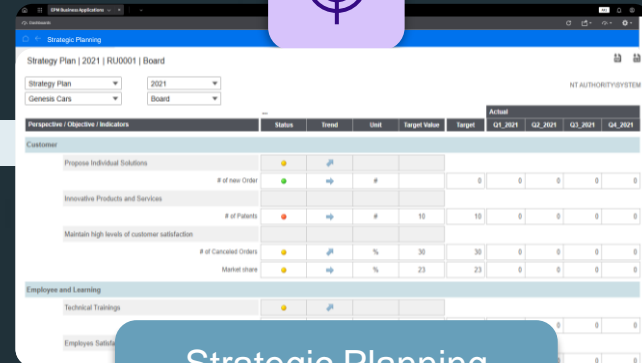
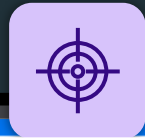


## Financial Reporting & Dashboards

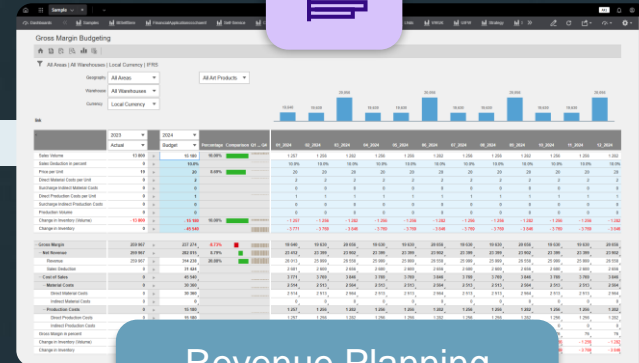
Delivers interactive dashboards, variance analysis, and data insights to empower stakeholders with up-to-date financial visibility and performance tracking.

# Integrated Financial Planning in a Closed Loop

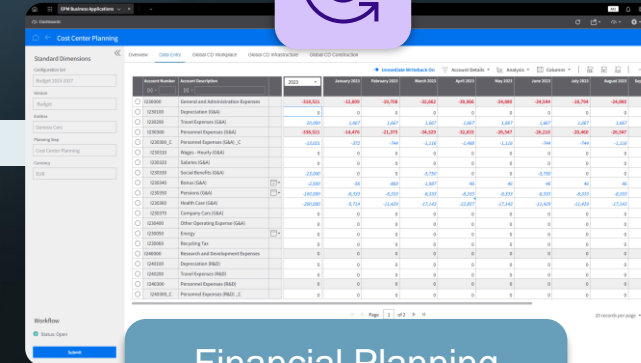
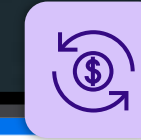
## Bringing together Strategic, Financial, and Operational Planning



Strategic Planning



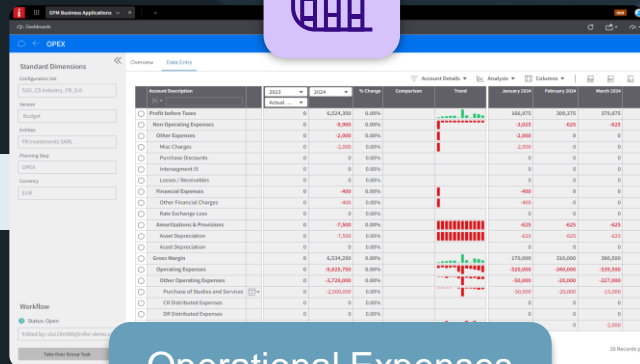
Revenue Planning



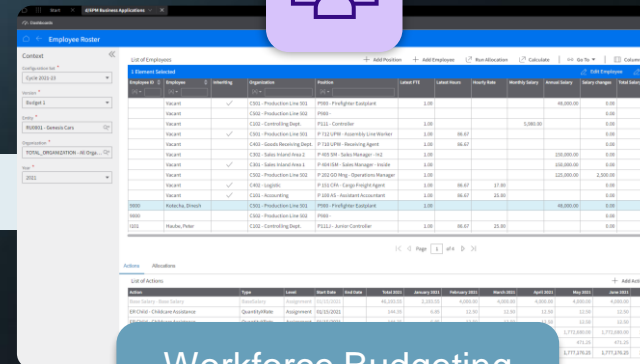
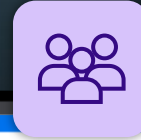
Financial Planning



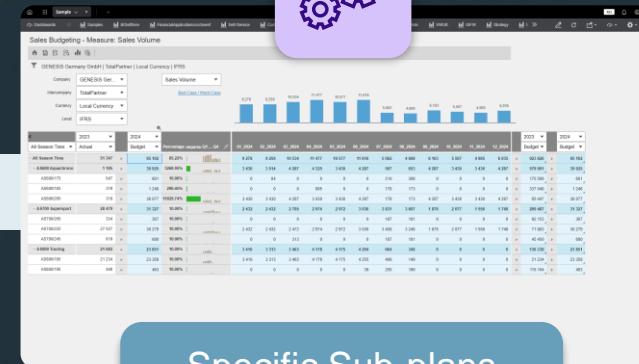
Capital Expenses



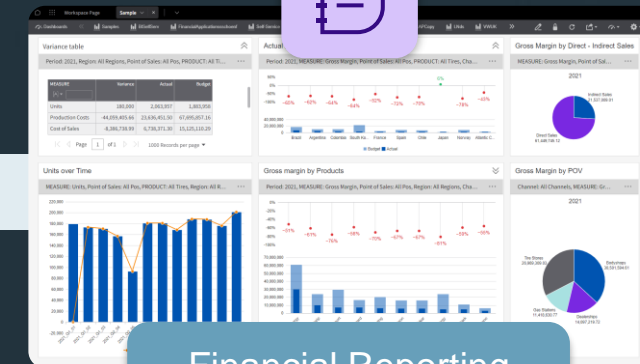
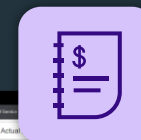
Operational Expenses



Workforce Budgeting



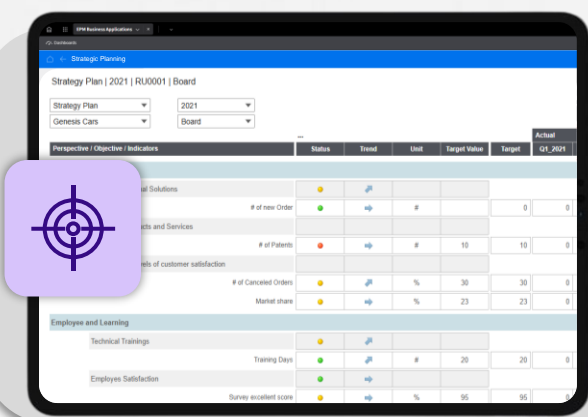
Specific Sub-plans



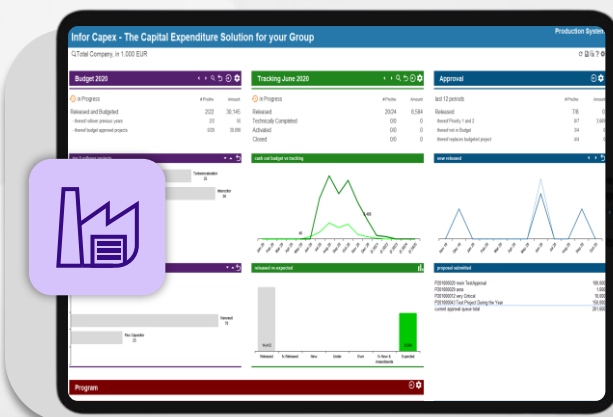
Financial Reporting



# Business Use Cases

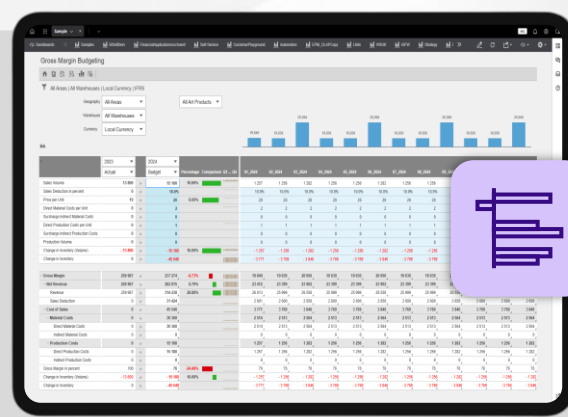


**Strategic Planning** is essential for CEOs and CFOs to align long-term business goals with financial realities. Organizations need to anticipate market changes, assess investment opportunities, and allocate resources effectively to drive growth and profitability.

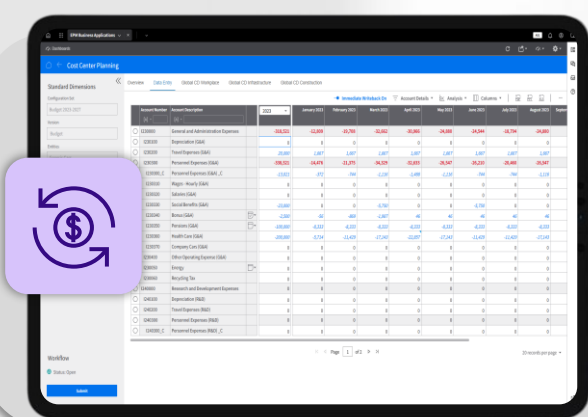
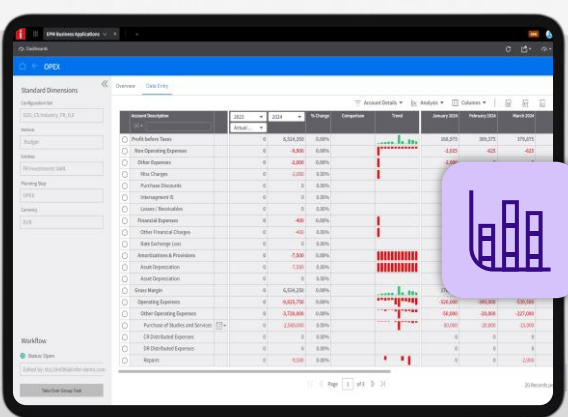


**Capital Expenses** are critical for businesses investing in expansion projects while maintaining financial discipline. CFOs need visibility into large capital expenditures, such as infrastructure, technology, or equipment, to ensure that spending aligns with strategic objectives and delivers strong ROI.

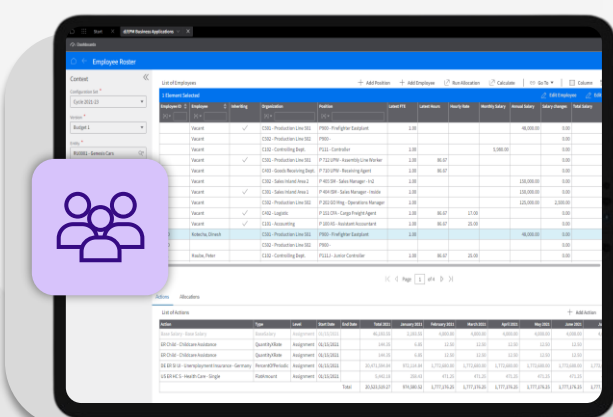
**Revenue Planning** is essential for Finance leaders who want to develop realistic revenue forecasts that factor in sales trends, pricing strategies, and market dynamics. By creating data-driven revenue models, organizations can set achievable targets and optimize pricing, and volume, strategies in a constantly evolving market.



**Operational Expenses (OPEX)** must be controlled to maintain profitability and financial health. Finance teams must monitor spending across departments, ensuring alignment with revenue and cost-saving initiatives. This enables organizations to reduce inefficiencies, optimize resource allocation, and gain full visibility into operational costs.



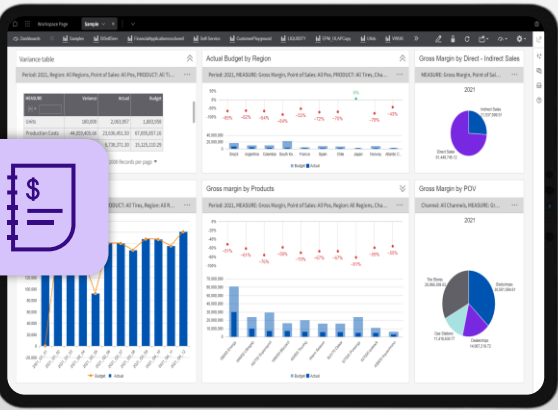
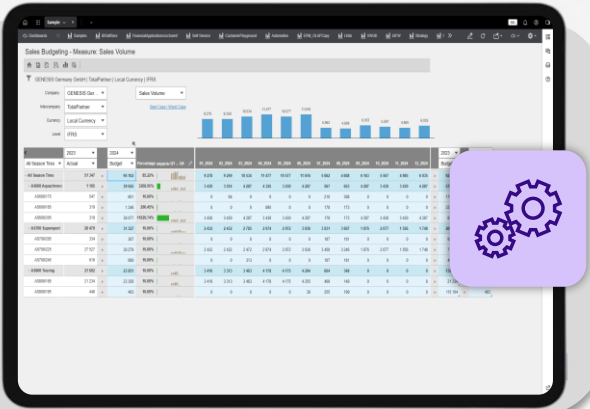
**Financial Planning** requires balancing revenue targets with financial forecasting. CFOs must translate sales expectations and supply plans into accurate financial results. Finance teams need to be able to model different revenue scenarios, adjust financial strategies, and align financial plans with business objectives.



**Workforce Budgeting** is critical for managing one of the largest and most dynamic cost areas of any business – its people. Finance and HR leaders must align headcount planning, salary projections, and benefits costs with corporate goals. A well-structured workforce budget enables organizations to optimize staffing labor cost levels with business growth strategies.

# Business Use Cases

**Specific Sub-Plans** help businesses address unique financial planning needs that go beyond standard budgeting models. Whether it's project-based budgeting, departmental forecasting, or industry-specific planning, the CFO requires flexibility to align financial strategies with operational priorities with their own custom decision-making solution.



**Financial Reporting** is the foundation of informed decision-making and regulatory compliance. Accurate and timely financial reports provide leadership with the insights needed to track performance, manage risks, and drive strategic initiatives with enhanced data insights.

This centralized, integrated platform enhances **collaboration among all contributors** involved in your business's budgeting and planning, by providing **multi-level workflows for approvals**.



# Key Benefits

## Automation of Complex Tasks

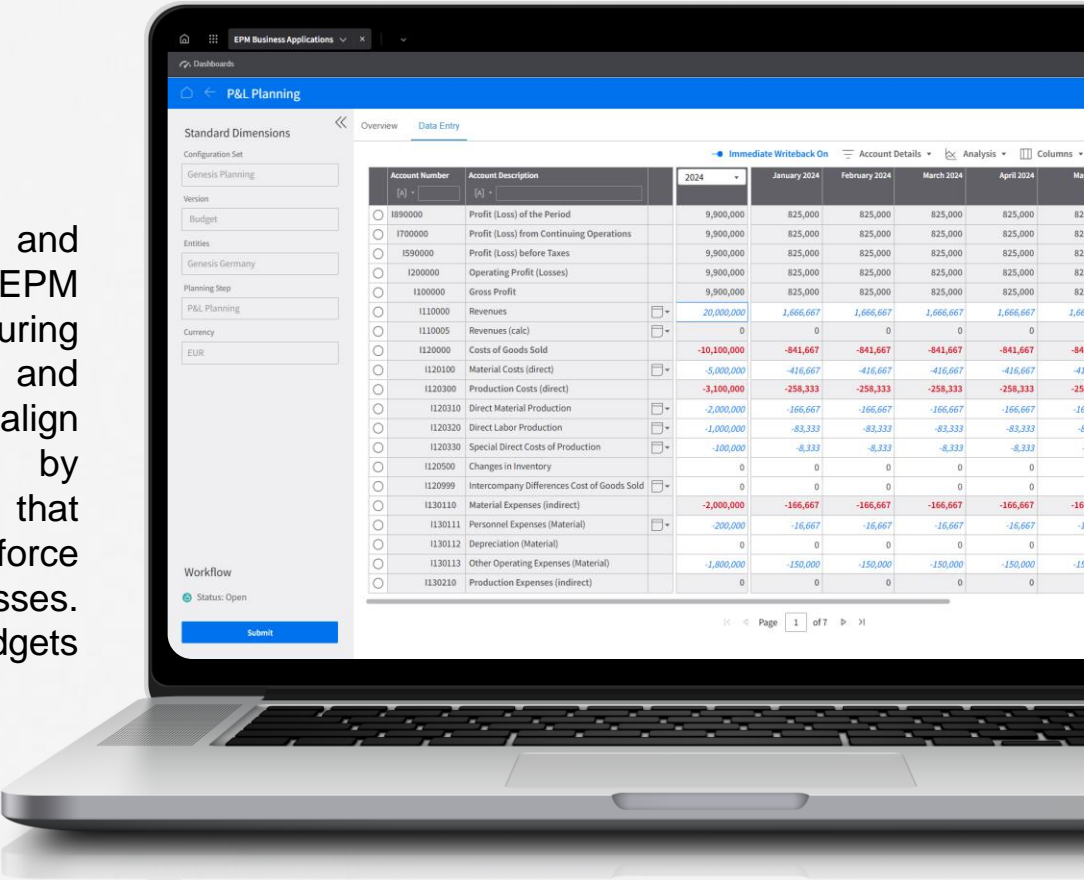
Infor EPM automates critical budgeting and forecasting tasks, eliminating the inefficiencies of manual data entry, workflow approvals, and version control issues. By reducing manual, time-consuming processes, organizations can significantly enhance accuracy while freeing finance teams to focus on strategic planning, scenario modeling, and performance analysis.

## Faster Budgeting & Forecasting Cycles

Our solution accelerates the entire budgeting process by automating data consolidation, approval workflows, and forecast adjustments. By removing bottlenecks and integrating financial and operational data, organizations can conduct rolling forecasts, ensuring they remain adaptable to changes in revenue streams, market conditions, operational expenses, and industry-specific challenges.

## Improved Financial Accuracy & Control

With near real-time data integration and automated validation checks, Infor EPM enhances financial accuracy by ensuring consistency across departments and business units. Organizations can align budgets with corporate goals by leveraging built-in financial controls that reduce errors and enforce standardization in planning processes. This ensures that forecasts and budgets are based on reliable data..





# Key Benefits (II)

## “What if” Scenario Planning & Analysis

Evaluate strategic options with speed and clarity. Infor EPM enables finance and sales teams to adjust key driver-based assumptions – such as pricing, volume, cost structures, or FX rates – and instantly assess their impact on margins, profitability, and overall financial performance. This scenario modeling supports agile decision-making in unpredictable environments, allowing to forecast best-case and worst-case scenarios.

## Interactive Reporting and Dashboards

Infor EPM provides data insights through interactive dashboards and customizable reports, giving finance teams greater visibility into key financial metrics. The platform offers self-service reporting and seamless integration with Microsoft Excel, allowing users to drill down into data, analyze trends, and generate detailed reports with ease.

## User-friendly Interface

Designed with finance professionals in mind, Infor EPM features an intuitive, user-friendly interface that simplifies budgeting and planning without the need for extensive IT support. The platform allows finance teams to manage workflows, approvals, and data entry efficiently while maintaining full control over financial processes. Its design enhances collaboration and allows users to tackle financial planning with confidence.

## Scalable, Cloud-based Agility

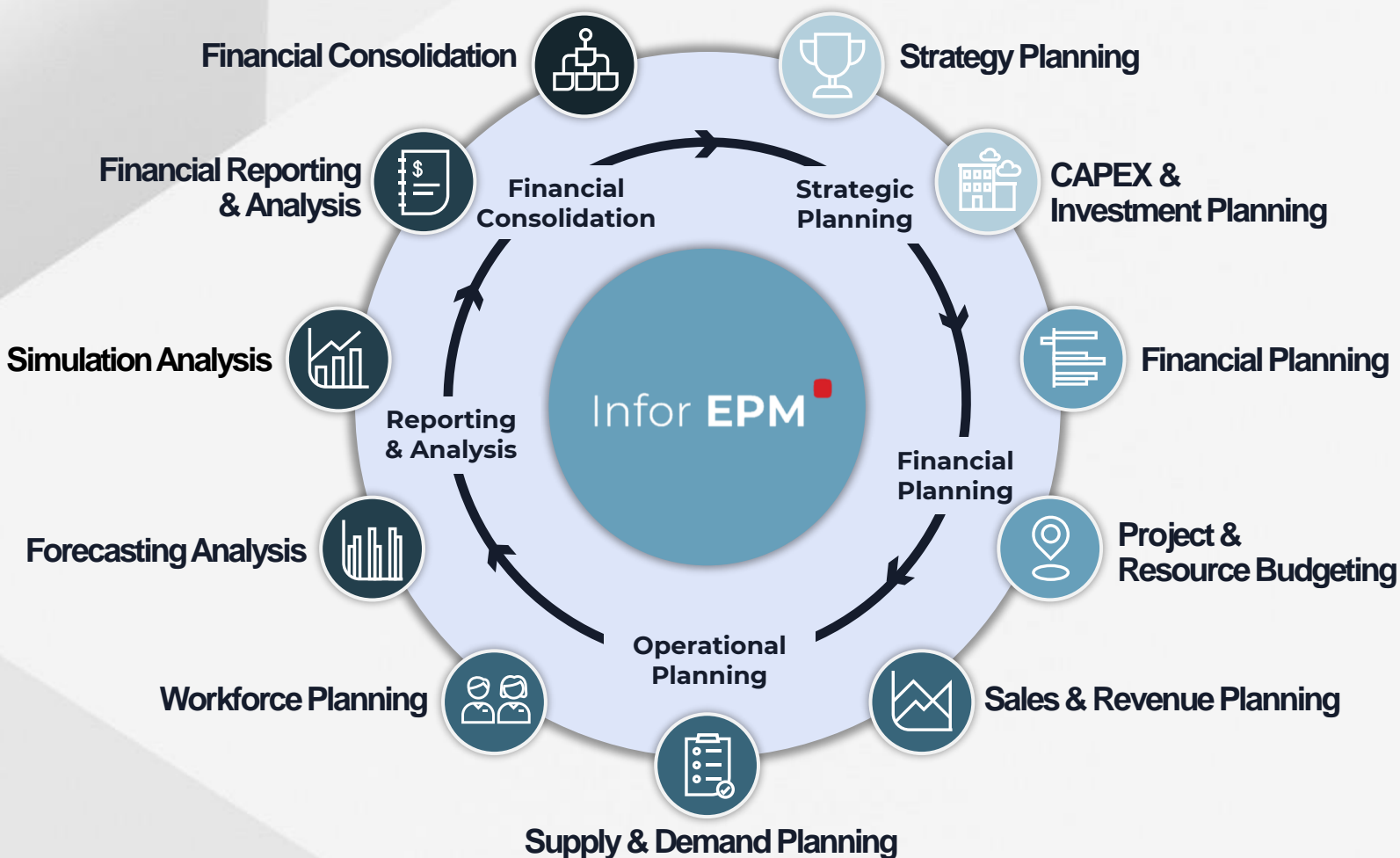
Built on Infor’s multi-tenant cloud platform, Infor EPM enables real-time collaboration across global teams, regardless of location. The cloud-based architecture ensures secure access to financial data and enhances data sharing. This agility is especially critical for enterprise-level businesses operating in a fast-paced, global environment.



# A Complete EPM Solution

Infor EPM goes beyond traditional budgeting and forecasting to deliver a comprehensive enterprise performance management platform that supports the entire spectrum of financial and operational planning. From **Strategic Planning**, to **Financial Planning** to **industry-specific Operational Planning**, we also provide solutions for **Financial Reporting** and **Financial Consolidation** needs, to ensure smoother close management cycles.

It combines advanced capabilities for budgeting, forecasting, planning, and analytics into a single, integrated solution. This enables organizations to align strategy with execution, providing insights and tools to measure, manage, and improve business performance across all areas of the enterprise – **financial planning, technology, and workforce**.



# Built on Cloud Platform Technology

All Infor cloud solutions are built in integrated 3 layers.

## Industry-specific Enterprise Applications



Infor EPM leverages the enterprise applications layer to deliver comprehensive performance management capabilities, including budgeting, planning, financial reporting, and financial consolidation. It ensures businesses can manage their performance with precision while sharing the same decision-making platform as EPM for Financial Consolidation.

## Infor OS Platform Technology



Infor Operating Services (OS) acts as the backbone, integrating Infor and non-Infor solutions through seamless data loading and imports. This platform provides unified access to data, enabling intelligent workflows, real-time collaboration, and advanced analytics. With robust API management and integration with third-party systems, Infor OS fosters streamlined operations and ensures all enterprise data aligns with decision-making processes.

## AWS Cloud Architecture



Built on AWS, the industry leader in cloud infrastructure, Infor solutions provide enterprise-grade scalability, security, and global availability. With features like elastic compute, disaster recovery, and robust encryption, AWS ensures Infor solutions operate at peak performance with minimal downtime.

Together, these three layers create a powerful, integrated digital business platform tailored to modern business needs.

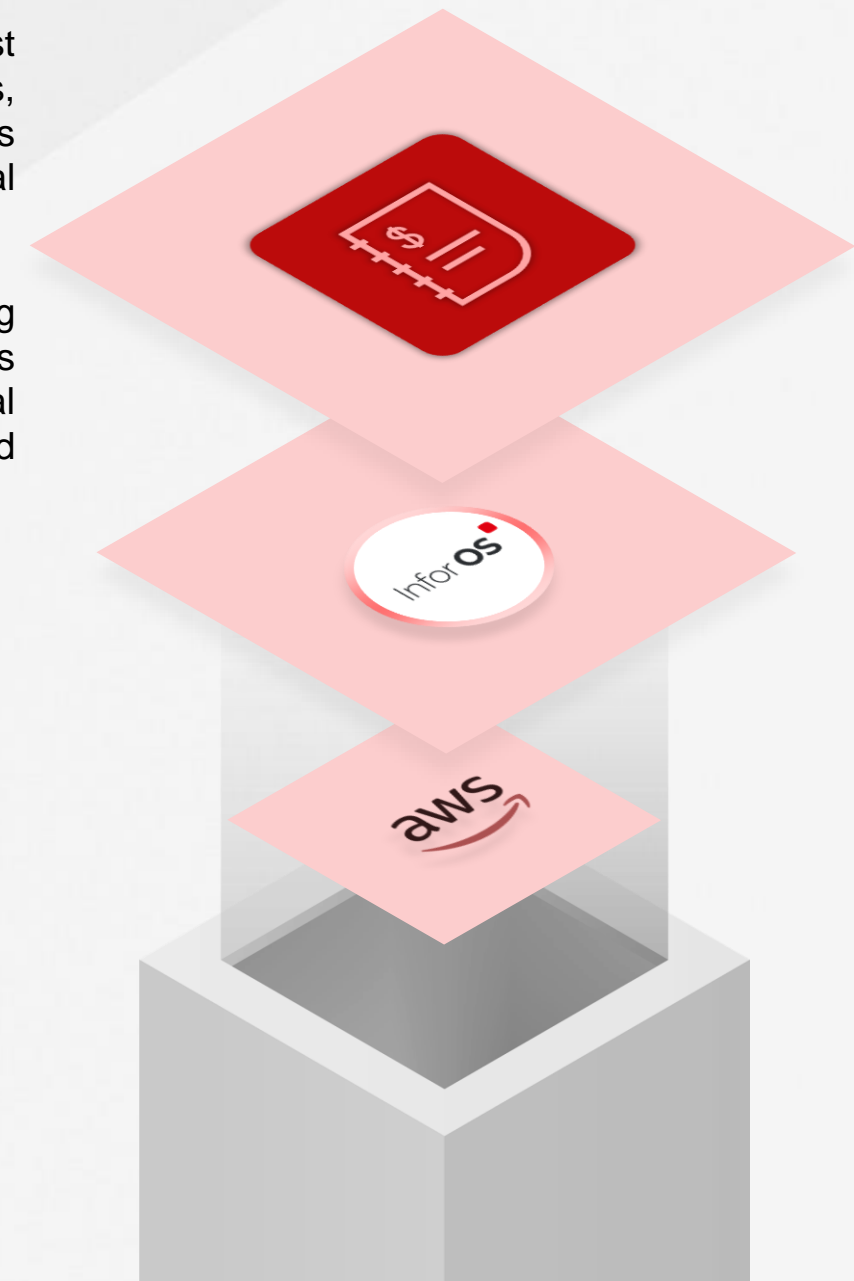
## Benefits of Infor OS

Infor Operating Services (OS) is a robust platform technology that integrates, automates, and enhances enterprise processes, serving as the foundation for a unified and intelligent digital business platform and ecosystem.

By connecting disparate systems, embedding advanced analytics, and enabling seamless workflows, Infor OS accelerates digital transformation, enhances decision-making, and fosters collaboration across the organization.

Our technology platform provides a multitude of features and functionalities:

- Unified user experience across all applications in ONE single portal
- Security with Single Sign-on (SSO)
- (Role-based) Workspaces
- Document Management
- Seamless integration with Infor ERPs
- Integration with 3<sup>rd</sup> party systems
- Robust API Management
- Real-time collaboration
- Data Lake & Centralized data access
- ION for automation of financial workflows
- Robotic Process Automation (RPA)
- Artificial Intelligence & AI-driven insights
- Mobile experience and flexibility





# Why Choose Infor EPM?

Infor is a global leader in industry-specific cloud solutions, trusted by over **60,000 organizations** across **more than 175 countries**. Delivering modern, enterprise-grade software designed to optimize business performance, Infor stands out for its commitment to tailoring solutions for **over 20 unique industries**, leveraging decades of deep domain expertise in a digital business platform. With **over 70 million cloud users worldwide** and backed by the infrastructure of AWS, Infor helps businesses to enhance operational agility and stay competitive in a rapidly changing global market.

## Why Choose Infor EPM for Budgeting & Planning?

Infor EPM provides a unified platform that simplifies time-consuming budgeting, planning & forecasting processes, enhances data accuracy and provides data insights. By automating routine tasks and integrating data from across the organization, Infor EPM allows businesses to focus on strategic decision-making while improving process productivity and financial performance.

### Streamlined Processes:

- 20% improvement in financial process productivity across various industries.
- Margin analysis by operational dimensions reduces manual efforts.

### Improved Data Accuracy and Insights:

- Delivers a single version of the truth for planning, forecasting and reporting.
- Enhanced data quality and depth, enabling better performance analysis.

### Time and Resource Savings:

- Automation reduces employee time spent on manual tasks like margin analysis.
- Frees up resources for strategic analysis by streamlining workflows.

### Scalable and Agile:

- Multi-tenant architecture enhances scalability for global operations.
- Integration with ERPs and third-party systems for flexible data management.

# A Market Leader

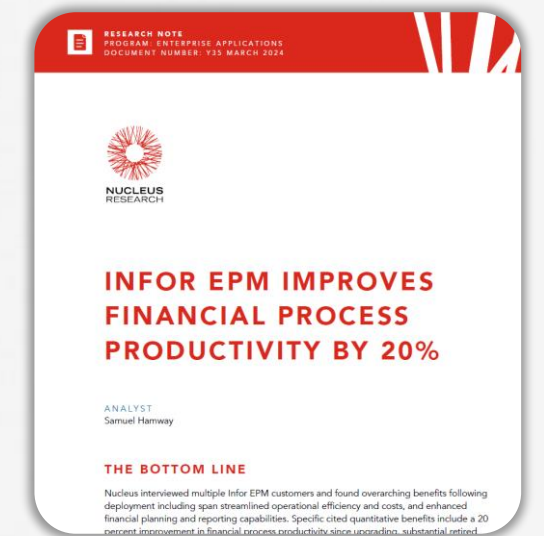
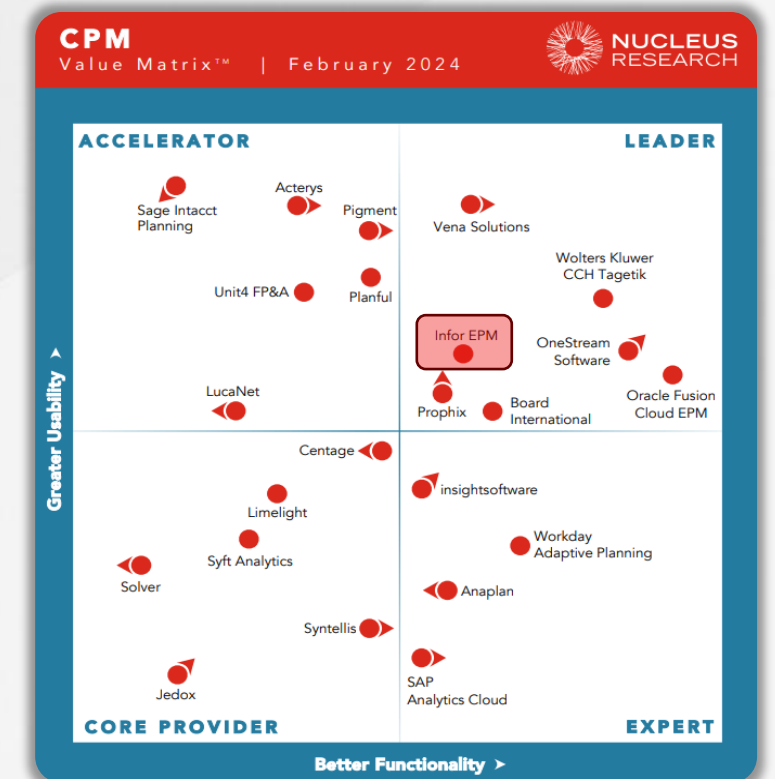
In 2024, Infor EPM has been recognized as a leader in the **CPM Technology Value Matrix** by Nucleus Research.

This distinction highlights Infor EPM's robust capabilities in budgeting, forecasting, financial reporting, consolidation, and extended planning across operational and sales domains.

Built on a cloud-native platform, Infor EPM provides seamless integration with both Infor and third-party applications, leveraging data injection and ETL tools for streamlined workflows.

**Customers have reported a 20% improvement in financial process productivity, with dramatic reductions in manual workloads and processing times.**

According to Nucleus Research, Infor EPM has delivered significant productivity improvements: streamlining financial processes and enabling organizations to achieve substantial operational efficiencies. For instance, roll-up model processing was accelerated by over 30x, saving valuable time for reporting and analysis. The platform's cloud-native design also eliminates the need for costly on-premises infrastructure, with customers citing substantial savings on server-related expenses.





# Certifications

At Infor, **data security and compliance** are at the heart of our solutions. Infor EPM follows globally recognized standards to ensure that your financial and operational data is managed with the highest level of security and integrity. **From safeguarding sensitive financial data to ensuring compliance with industry regulations**, our certifications demonstrate a commitment to protecting your business. As part of Infor’s enterprise-grade cloud ecosystem powered by AWS, we adhere to stringent data protection standards and regularly undergo rigorous audits to maintain compliance with certifications like **ISO, SOC**, and other key regulatory frameworks. This ensures your data remains secure, accessible, and reliable in the cloud.

You can learn more in the [Infor Software as a Service \(SaaS\) Delivery guide](#).

For more information on Infor Certifications and Cloud Security, please visit: <https://trust.infor.com/>



**IDW PS 880**  
Infor EPM  
Financial Consolidation



**ISO 27001**  
Security Management  
Controls



**SOC 2**  
Security, Availability, &  
Confidentiality Support



# Implementation Approach

What is the Infor Deployment Method? Infor's Deployment Method (IDM) is a unified implementation framework designed to streamline the deployment of Infor solutions across various environments, including cloud, hosted, and on-premises setups.



## For customers

A proven framework that helps deliver projects with predictable results and rapid return on our customer’s investment.



## For Infor

A global command and control framework that includes implementation best practices, templates and examples which is extensible by industry.



## For Infor Services

A coupled collection of method tasks, associated with industry specific content, that can be deployed in any mode on the disciplined, agile, lean continuum.

**Consultative & Collaborative Approach:** Engage with clients through interactive workshops to ensure alignment and shared understanding.

**Phased Build Process:** Utilize a phased approach to support solution validation and skill transfer during the build phase.

**Training and Skill Development:** Conduct solution-specific training sessions and skill workshops to empower the client team.

**Expert Project Team:** Deploy a balanced team of Infor Onshore Consultants and Offshore Consultants (GPS/GDS) to provide expertise throughout the project.

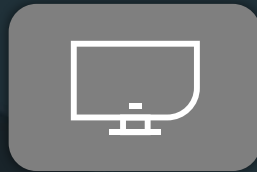
**Client Participation:** Actively involve the client team in data validation, reconciliation, and solution testing to enhance knowledge and ownership.

**End-User Support:** Deliver comprehensive end-user training and support to ensure smooth adoption, and detailed documentation to equip users with the resources they need for ongoing operations.



Infor **EPM**

# Thank you!



Infor EPM  
Webpage



Infor YouTube  
Channel

Infor is a global leader in business cloud software specialized by industry.

[infor.com](https://www.infor.com)



The power of a  
unified, cloud-based,  
**performance  
management  
solution**