

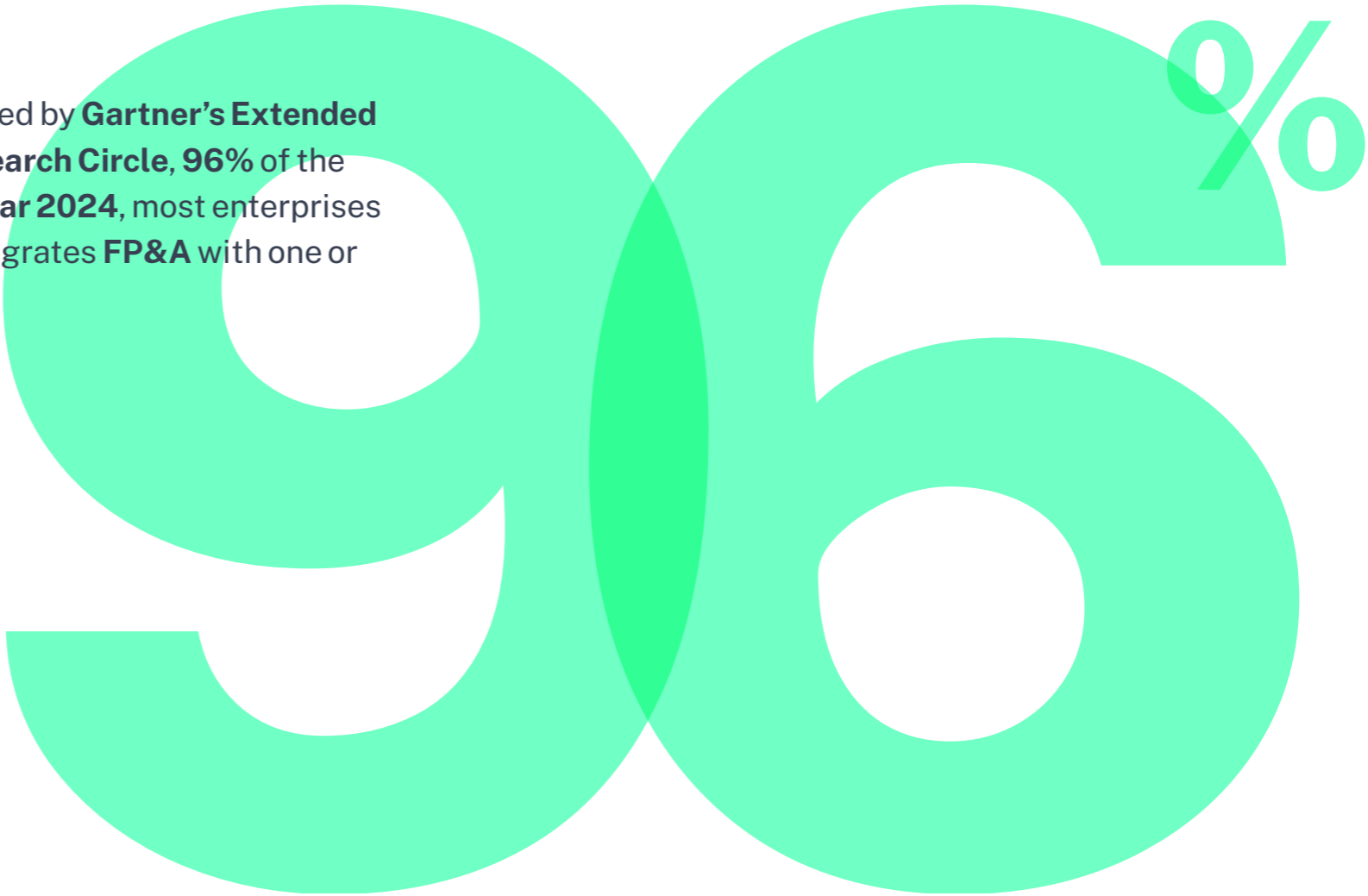
Planning Tool Guide

The Ultimate Guide to Evaluating Planning Tools

“If you don’t have a vision for the future, then your future is threatened to be a repeat of the past.”

— A. R. Bernard —

According to a recent survey conducted by **Gartner's Extended Planning and Maturity Analysis Research Circle**, **96%** of the respondents anticipate that **by the year 2024**, most enterprises will have a planning strategy that integrates **FP&A** with one or more operational planning areas.



From chaos to control: Going beyond traditional planning tools

With the advent of xP&A, organizations need solutions that go beyond traditional planning and effectively integrate FP&A with other key operational areas, such as workforce planning, product development, sales forecasting, and others. With so many options available in the market today, it can be overwhelming to determine which tool is best suited for your specific needs.

This guide is designed to help you evaluate planning tools and choose the one that best supports your business-specific goals and objectives. Whether you are a small organization or a global enterprise, this guide offers all the information you need to make an informed decision and choose a planning tool that can help maximize the success of your planning, budgeting, and forecasting initiatives.



The Ultimate Guide to Evaluating Planning Tools: Critical Questions to Ask

In this guide, we will evaluate xP&A solutions based on seven major areas:

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MAXIMIZE YOUR PLANNING SUCCESS

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1. Key factors

1. Key factors

Before starting the evaluation process, it is crucial to take a step back and consider some **fundamental factors** that will help you understand your requirements better. This can include **identifying specific goals** you hope to achieve with an xP&A solution and considering the potential impact it may have on various stakeholders and organizational roles.

Additionally, you can note down a list of **scenarios and industry requirements** that the tool must facilitate for it to be a good fit for your business.

By **taking the time** to answer these questions beforehand, you can ensure that you are looking for a planning tool that is well-suited to your specific needs.

a. Business impact and value

Establish what goals you hope to achieve with the implementation of an xP&A solution and the potential effects it could have on your organization’s operations and performance. For example, do you need the tool so that you can:

- i. Uncover holistic insights that relate financial data to operational and strategic areas.
- ii. Understand what is happening in your business and what can happen in the future.
- iii. Become a data-driven organization where all teams are empowered to make data-driven decisions.
- iv. Increase sales and revenue by forecasting customer demand.
- v. Accelerate the time it takes to get value from data.
- vi. Respond rapidly to the changing market conditions.
- vii. Understand the main KPIs and drivers that impact your business performance.
- viii. Assess the ROI of various business activities.
- ix. Gain a competitive edge in the market by entering a new market segment.
- x. Conduct multiple “what if” simulation for your business to be ready for uncertain circumstances.





b. Influence on organizational roles

To enable your teams to make informed decisions, it is essential to provide them with accurate data and analytics. An xP&A solution empowers teams to get the most out of organizational data with processes like forecasting customer demand, analyzing past trends, and predicting probable future outcomes. Such a system can significantly impact the work of individual members and departmental teams.

You can start by defining how an xP&A solution may influence the various organizational roles of your company and other stakeholders.

- i. Which groups of users will have access to the tool at your company and what are their organizational roles?
- ii. What are the potential impacts of the planning tool on the team's activities and performance?
- iii. How will the tool's output provide value for each role and stakeholder?
- iv. What level of data analysis and FP&A expertise does the user require to use the tool effectively? Do they need to have advanced data analysis skills, moderate data knowledge, or even a business user can use the tool easily?
- v. Which departments/functions/roles will the tool serve at your company? (Finance, Sales, Marketing, Operations, etc.)
- vi. Who is responsible for selecting, implementing, and managing the tool?
- vii. Who will be the intended recipients of the tool's output? C-level executives, board of directors, planners, managers, etc.?





c. Industry-specific requirements

To ensure that you get the most value out of the tool, it is important to initially identify your business-specific market and industry requirements. While most vendors offer a general set of features in their solution offerings, some may offer specialized features tailored to specific industry needs.

- i. Are you looking for an industry-agnostic tool?
- ii. Will the tool serve a specific industry such as retail, manufacturing, financial services, construction, healthcare, etc.?
- iii. Do you require the tool to have any industry-specific features, functions, or pre-built packages?

d. Use cases

To select the best-fit solution, you need to identify the specific use cases the planning solution is intended to solve for your business.

- i. Do you want to create financial plans, allocate budgets, and forecast financial growth?
- ii. Do you want to forecast market demand and determine how to serve demand while remaining profitable?
- iii. Do you want to identify the right workforce mix and investment required to support future business scenarios?
- iv. Do you want to forecast your sales and determine how they relate to your business goals and objectives?
- v. Do you want to model tactical and strategic scenarios to realize the factors affecting capacity, inventory, production, and distribution?
- vi. Do you want to address all the above scenarios and have them connected through advanced data models?



2. Data management

2. Data management

Data management capabilities are core to a planning and budgeting tool. **The tool’s value can diminish significantly if it has problems with data integration, processing, and storage.** You must evaluate how the tool integrates different data sources, supports building models, and stores data in the warehouse.

This will help you to understand how efficiently the platform will handle your data and provide **reliable results** for critical decision making.



a. Data integration and connectivity

Evaluate the tool’s ability to connect, extract, and unify data across different systems, applications, and databases.

- i. Can you unify data from various data sources and applications using a single interface? Such as accounting solutions (Net-Suite, Xero, QuickBooks, MYOB, etc.), CRM systems (Salesforce, HubSpot, Zoho, etc.), and ERPs (SAP, Oracle, etc.)
- ii. Can you connect to any source that is accessible through standard ETL tools (SQL Server SSIS)?
- iii. Does the platform offer multiple pre-built connectors (to common apps) for quick, accurate, and timely data loads?
- iv. Does the platform ensure that no data loss and errors are encountered during the integration process?
- v. Can you load unstructured data without having to model or clean it beforehand?



b. Data modeling

Evaluate the tool's ability to create data models and share them across finance and operational plans.

- i. Does the platform offer a powerful, fast, and multidimensional modeling engine that can instantly simulate different scenarios based on critical drivers, such as the introduction of new products, changes in organizational structures, fluctuating pricing, currency effects, etc.?
- ii. Is the tool capable of preparing a “single version of truth” data model on both the cloud and on-prem?
- iii. Can the platform automatically generate data models?
- iv. How easy is it to customize data models by adding new dimensions and facts?
- v. Does the platform utilize a common data model across all functions (Finance, Sales, HR, Marketing, etc.)?

c. Data warehousing

Evaluate the tool's ability to consolidate and store business data to fuel the reporting and planning processes.

- i. Can the platform aggregate multiple datasets into a single, central database for reporting and analysis? How easy is the process?
- ii. Is the platform designed to use its own data warehouse or can you integrate it with an external storage solution, like SQL Server, Azure, or Redshift?
- iii. Does the platform offer various data hosting options like cloud, on-premises, and hybrid?
- iv. Is there a way to timely sync data updates from the source to the warehouse based on an event as well as a defined schedule?
- v. Does the platform allow users to make changes to the data in the warehouse and perform real-time scenario analysis?



3. Functional criteria

3. Functional criteria

This section is focused on evaluating the key functions and procedures that the planning tool can assist with. Be sure to refer to the **list of use cases you previously identified** and see how many of those are met by different vendors.

a. Planning

To address the ongoing market disruptions caused by the pandemic and inflation challenges, businesses need to adopt solutions that integrate their financial plans with operational and strategic areas and enable them to perform connected, dynamic, and collaborative planning.

- i. Does the platform support dynamic planning that is agile, continuous and allows users to frequently reassess and adjust plans in response to changing conditions and the latest information?
- ii. Can you simulate different scenarios and their impact on the organization's financial performance, such as changes in revenue, expenses, or other key variables?
- iii. Does the platform support driver-based planning to identify and analyze the key drivers that have the greatest impact on your business performance?
- iv. Does the platform allow you to perform integrated business planning where you can build connections between various functions such as product development, sales, marketing, operations, etc.?

- v. Does the platform offer planning flexibility supporting top-down and bottom-up approaches (absolute, relative, add, fill, etc.)?
- vi. Can the platform build logic-driven hierarchies to enable constraint-satisfaction planning?

b. Budgeting

An advanced planning tool not only provides basic analytics but also empowers business leaders to utilize its data to optimize budget allocation and evaluate results against set targets.

- i. Can you create budgets for different departments using historical data, forecasts, and assumptions?
- ii. Can you link budgeting processes with operational, financial, and strategic planning?
- iii. Can you perform budget variance analysis using the tool, where the planned budget is compared against actual performance?
- iv. Does the platform support different budgeting approaches, like top-down and bottom-up?
- v. Can the platform handle and process transactions in multiple currencies?



c. Forecasting

The ability to forecast future outcomes based on historical data is another key aspect of a planning tool. It must offer advanced data analytics for identifying trends and patterns across critical business aspects, such as financial performance, sales trends, market demand, etc.

- i. Can you create rolling forecasts using the platform where the projections can be updated for a set period regularly?
- ii. Can you perform comparisons between different forecasted periods to identify deviation from plan?
- iii. Can you forecast the future performance of various business aspects, such as sales, costs, demand, inventory, cash flow, etc.?

d. Performance management

Corporate performance management is a key aspect of an xP&A solution. Business leaders must be able to link their plans, budgets, and forecasts to overall corporate performance and find answers to bigger questions that can unlock the full potential of your business.

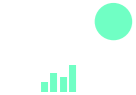
- i. Can you set goals and targets for business performance?
- ii. Can you track and compare actual business performance with the goal, and identify any discrepancies or deviations?

- iii. Can you effectively monitor and report on KPIs across distinct functions, such as marketing, sales, product development, etc.?
- iv. Can you easily move targets based on the latest information?

e. Data Augmentation (Write-back) functionality

Writeback is essential for data analysis and forecasting as it enables the user to make changes to the database without leaving the analytical system. This allows for more efficient and dynamic scenario planning, as users can quickly test different assumptions or input values without the need to manually update the data in the source.

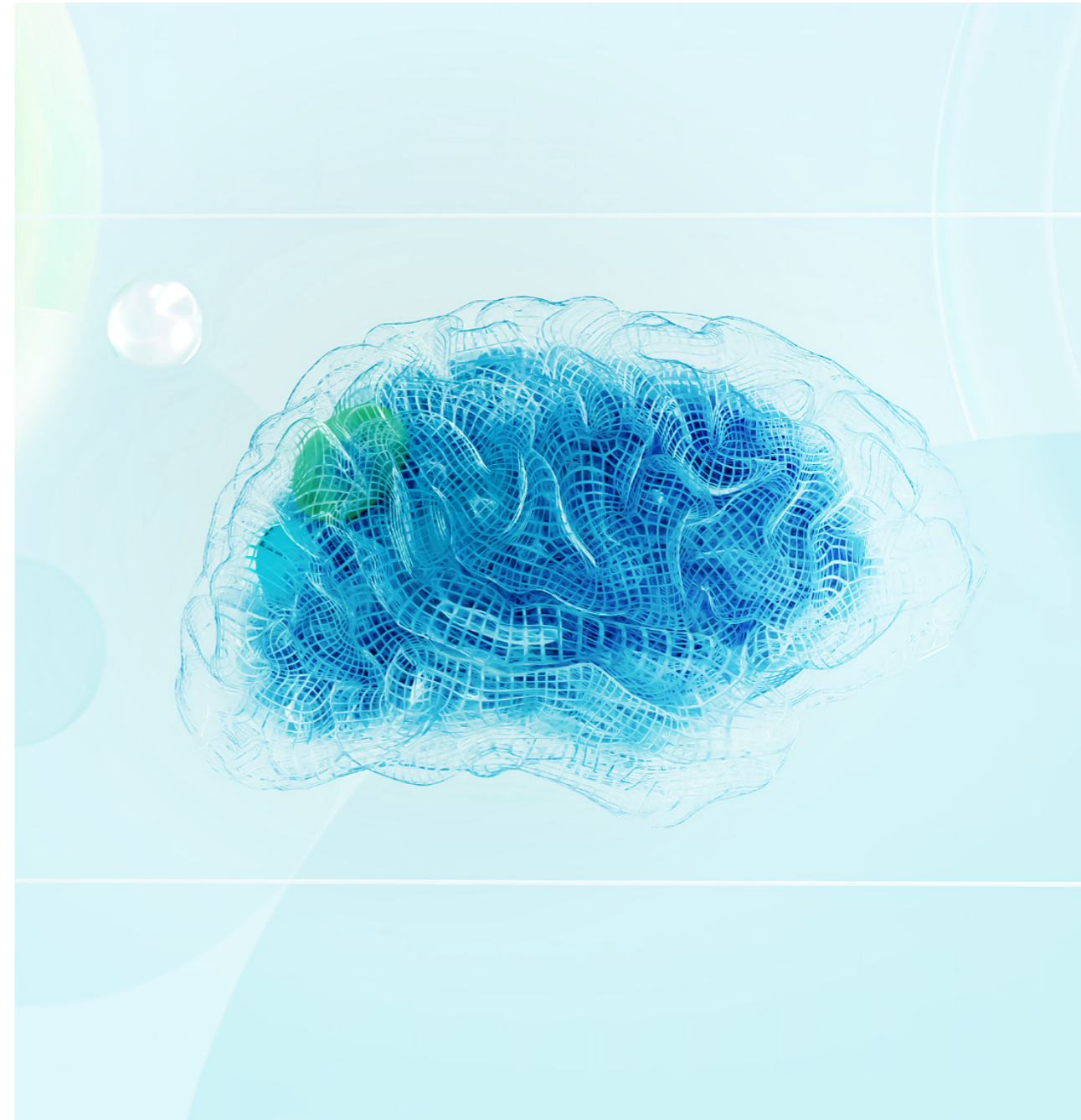
- i. Can you make changes to the source table without leaving the interface and immediately view the impact of those changes?
- ii. Does the platform store the writeback changes to the visual or a single source of truth?
- iii. Does the platform store the writeback changes in the original database or in a separate writeback table?
- iv. Does the platform support concurrent writebacks by multiple users to a central data model?
- v. Do users get real-time access to writeback changes without having to synchronize a variety of sync tables?



f. Predictive analytics, AI, and machine learning

Incorporating modern technologies like machine learning, AI, and predictive analytics into your planning solutions can lead to quicker and more precise outcomes.

- i. Does the platform use predictive and prescriptive analytics to augment human intelligence?
- ii. Does the platform leverage AI and ML algorithms to identify trends and patterns that can be incorporated in plans, budgets, and forecasts?
- iii. Does the platform leverage AI and ML algorithms to identify anomalies and provide recommendations for created plans?
- iv. Does the platform leverage AI and ML algorithms to improve the insights provided over time?
- v. Does the platform accept and incorporate user feedback to finetune AI/ML algorithms and generate more accurate analytics in the future?



4. Business features



4. Business features

In this section, we will delve into some crucial features that are available across the platform and **streamline the process execution**, thereby improving operational efficiency and boosting productivity for your teams.

a. Single sign-on

Evaluate the tool's ability to simplify platform access and user permissions.

- i. Can you integrate the platform with identity and access management providers, such as Active Directory, Okta, Duo, etc.?
- ii. Does the platform offer single sign-on options with other commercial tools, such as Google, Outlook, etc.?
- iii. Does the platform consider the user permissions and access rights that are granted by the IAM provider?
- iv. Does the platform properly enforce these rights to ensure users have the appropriate level of access to the platform's resources and functions?



b. Interface and self-serviceability

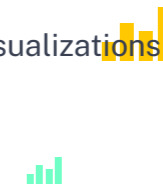
Evaluate the tool's UI/UX and determine if it is simple enough for non-technical business users to operate without the need for IT assistance.

- i. Does the platform offer all functions (data integration, modeling, and warehousing) in a single interface?
- ii. Are there options to switch the front-end of the platform to another familiar tool, such as Power BI or Excel?
- iii. Can every individual use the tool without the assistance and support of IT and other technical experts?
- iv. Does the platform offer no-code or low-code planning, forecasting, and budgeting capabilities?

c. Reports, dashboards, and visuals

Evaluate the tool's ability to build and customize reports, dashboards, and visuals.

- i. Are there different visualization options available, such as bar graphs, line charts, scatterplots, heat maps, and histograms?
- ii. Do you get suggestions about which visualization to use for specific reports?
- iii. Can you switch between different visualizations for the same report?



- iv. Do visualizations suggest the shape of data and identify outliers?
- v. Does the platform come with pre-built report templates that can be easily customized and used to create reports with minimal effort?
- vi. Can you build reports for monitoring business specific KPIs and scorecards?
- vii. Can you bring different reports together and create custom dashboards?
- viii. Can you create reports for different time periods, such as weekly, monthly, yearly, etc.?
- ix. Are there drag-and-drop capabilities available for creating reports, moving data points directly in graphs, etc.?
- x. Is it easy for users to create one-off ad hoc reports?
- xi. Can you export reports in different formats, such as spreadsheets, presentations, and PDFs?
- xii. Do the reports have a standard formatting and style?
- xiii. Do the reports and visuals support IBCS standards that allow at-a-glance understanding and consistent communication?
- xiv. Can you easily connect report data to external tools such as Power BI, Tableau, etc.?
- xv. Does the platform provide specialized Power BI visuals and dashboards that are tailored for specific business use cases and needs?
- xvi. Does the platform offer natural language processing (NLP) capabilities, allowing users to query and interact with the system using natural conversational language?

d. Governance

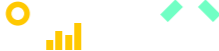
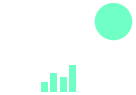
Evaluate the tool’s ability to govern and protect your organization’s data assets.

- i. Can you enable roles-based access where specific users can access and manipulate only certain aspects of the platform?
- ii. Does the platform log audit trails?
- iii. Does the platform track detailed read and write actions?
- iv. Are the logs comprehensive enough to elaborate on every activity that a specific user performed within the platform?
- v. Is the platform capable of restoring data models and reports to past versions?
- vi. Does the system support the flexibility to add/remove IP addresses?

e. Collaboration, comments, and sharing

Evaluate the tool’s ability to allow collaboration and sharing between siloed teams.

- i. Does the platform support highly connected and participative planning processes?
- ii. Can different functional teams access the platform to collaboratively create plans, budgets, and forecasts?





- iii. Can users leave comments on specific data points and reports?
- iv. Can others respond to comments?
- v. Can you create different views for different departments/users?
- vi. Can you access the tool’s features in other collaborative apps like Microsoft Teams?

f. Workflows, automation, and scheduling

Evaluate the tool’s ability to automate repetitive and time-consuming tasks and other administrative workflows to improve process efficiency.

- i. Does the platform offer built-in administrative workflows to review and approve plans?
- ii. Can you add multiple users in the approval process?
- iii. Can you assign workflows and tasks to users and set due dates?
- iv. Does the platform allow you to streamline and automate the reporting process of your company?
- v. Can you schedule reports based on date/time and events?
- vi. Can you schedule data refreshes and reloads from the connected data sources?



g. Alerts

Evaluate the tool’s ability to configure and send out notifications when needed.

- i. Is the platform capable of sending alerts and notifications to users via email or other communication channels, such as Teams, Slack, etc.?
- ii. Can you configure email notifications based on different criteria, such as when KPI levels plunge below thresholds, etc.?
- iii. Do notifications contain links to relevant reports, models, dashboards, etc.?
- iv. Can these alerts be configured for different users and through a simple and easy-to-use interface?

h. Real-time insights

Evaluate the tool’s ability to produce quick and timely insights.

- i. How quickly does the platform turn data into value?
- ii. Is it possible to see the effects of modifying data points in real-time?



5. Infrastructure

5. Infrastructure

When selecting an enterprise-wide tool such as an xP&A solution, it is important to evaluate its **compatibility** with your **existing IT infrastructure**. In this section, we will assess some key factors about the tool, including its architecture, configurability, implementation requirements, and security considerations.

a. Architecture and deployment

Evaluate the tools' architecture and supported deployment options.

- i. Is the planning solution a stand-alone system or does it come integrated with industry-leading tools, such as Excel and Power BI?
- ii. Is the solution an end-to-end, unified platform, a specialized tool with planning capabilities only, or does it have multiple, disconnected components for data integration, modeling, planning, and forecasting?
- iii. Where is the data stored during different phases, such as when it is being warehoused or analyzed?
- iv. Is the solution accessible through a web browser or does it require desktop installation?
- v. What deployment options does the platform offer: SaaS, custom public/private cloud deployments, on-premises installation, etc.?

b. Flexibility and customizations

Evaluate the tool's ability to be personalized according to your business-specific needs.

- i. Does the solution allow API integrations to extend the system functionality according to your needs?
- ii. What level of customization is possible with the solution?
- iii. Can you select the data storage location of your choice?
- iv. Can you customize data models based on selected dimensions and attributes?
- v. Can you update reports and dashboards?
- vi. Does it allow you to change graphical options, colors, formats, and styles?

c. Implementation requirements

Evaluate the effort and time required to get the tool up and running.

- i. What are the hardware requirements for the platform's server and client to run efficiently?
- ii. Does the system require specific software to be installed to function properly, such as an operating system or database management system?



- iii. Does the system need to be integrated with other systems or applications to function as intended?
- iv. Does the system have any requirements for how that data is formatted and structured before being imported?
- v. How long will it take to get the platform up and running in your organization?
- vi. Does the vendor offer implementation support?
- vii. Does the tool require any additional installation or maintenance, or is it instantly available for use?

d. Security certifications and compliance

Evaluate the tool’s ability to keep your organization data safe and secure.

- i. Does the platform hold certifications in data security and governance to ensure compliance, such as SOC 2, ISO 27001?
- ii. How is user access controlled and authenticated?
- iii. Does the tool have a robust and regularly updated security policy in place?
- iv. Is the tool compliant with relevant legal data protection and privacy regulations?

e. Integrations and embedding

Evaluate the tool’s ability to integrate and embed across common applications?

- i. Does the platform offer any pre-configured apps to connect and plan-enable data of commonly used enterprise applications, such as QuickBooks, Xero, Salesforce, etc.?
- ii. Does the platform offer native integration with leading BI tools, such as Power BI and Excel?
- iii. Can you embed reports in other applications such as Microsoft Teams (PowerPoint, Word, Excel), Google Sheets, and other tools?

f. Device and browser compatibility

Evaluate the tool’s ability to perform efficiently across different devices and browsers.

- i. Do all platform features and functions work as expected on different devices (mobiles, laptops, desktops, etc.)?
- ii. Do all platform features and functions work as expected on different operating systems (Windows, Linux, iOS)?
- iii. Do all platform features and functions work as expected on different browsers (Chrome, Edge, Firefox)?

A photograph of a male athlete in a running pose, captured in a dark environment with a teal-colored smoke or mist effect. The runner is positioned on the right side of the frame, moving towards the left. The overall aesthetic is high-tech and dynamic.

6. Performance factors



6. Performance factors

The xP&A solution must be able to handle the volume and complexity of your organizational data efficiently. For this reason, it is best to evaluate the tool against **basic performance factors**, such as **accuracy, speed, scalability**, and so on.

a. Accuracy

- i. Does the solution encounter data loss, errors, or inaccuracies during the consolidation and modeling process?
- ii. Does it offer any data quality features to ensure data consistency
- iii. Are the accuracy rates of the platform’s modeling, planning, and forecasting modules evaluated? If yes, then do the numbers look promising?

b. Scalability

- i. Can the tool handle large volumes of data without performance degradation?
- ii. Is the tool capable of scaling across multiple departmental functions without performance degradation?
- iii. Can you scale the solution to different types and sizes of data sources?
- iv. Does the platform support adaptive capacity to instantly add extra processing power in real-time for more demand planning cycles?
- v. Can the platform support large-scale concurrent write-back via multi-threading?



c. Speed

- i. How smoothly and quickly can you connect the platform to multiple sources, extract relevant data, and optimize it into a data model?
- ii. How fast can the system process large datasets, and generate valuable insights and reports?

d. Usability

- i. Is the tool user-friendly and intuitive to use?
- ii. Does the tool have a clean and visually appealing interface?
- iii. How easy is it to navigate through the tool and access different features?
- iv. Does the tool bring data management and planning capabilities in a single interface for quick and easy navigation?
- v. Is it easy to create, edit, and share reports and dashboards with others?

e. Size

- i. Is the platform designed for small and medium-sized companies, or large enterprises?
- ii. How easy is it to add storage capacity?



7. Adoption

7. Adoption

The final factor to consider when choosing an xP&A solution for your organization is **how adaptable** it is for different **business sizes and users**. This includes evaluating its pricing structure, the training and support available, and its reputation in the industry.

a. Package for specific use cases

- i. Are there pre-designed, plug-and-play packages available with the system that can help speed up the time to value?
- ii. Do these packages come at an extra cost or are they included in the overall price?
- iii. Are these packages available for your specific use case, such as financial services, logistics and distribution, procurement, etc.?

b. Training and support

- i. Does the vendor offer any training resources to onboard users?
- ii. Does the vendor offer customer support to assist users and answer questions that they may have?
- iii. Does the vendor's customer support timely resolve issues?
- iv. Does the vendor have in-house FP&A experts that can assist during any initial challenges that may arise?

c. Pricing structure

- i. What pricing packages does the vendor offer?
- ii. Is the pricing easy to understand?
- iii. Does the vendor offer any discounts for specific types of organizations?

d. Customer and industry reviews

- i. How do major industry analysts review the vendor (Gartner, G2, InfoTech, etc.)?
- ii. Does the vendor have a large customer base?
- iii. Does the vendor have positive reviews and testimonials from customers?



Conclusion



Acterys — End-to-End xP&A Solution for all Your Performance Management Needs

Acterys – trusted by **700 companies** worldwide – enables your **xP&A transformation** with dynamic planning and analytics capabilities. With Acterys, you can plan and prepare for the future with more certainty and predictability.

We provide a comprehensive set of intelligent data modeling, planning, and forecasting solutions all on a **single platform** that can be deployed either in the cloud or on-site. Our platform is designed to provide your team with the insights they need to **make decisions in real-time**.



KEY FEATURES

Some of the key features of Acterys include:

■ **Single-click integrations** to major accounting systems, ERPs, and CRMs through pre-configured apps.

■ A powerful **web-based modelling engine** that enables business users to create and edit their business models as needed.

■ **User rights administration** and governance (e.g., detailed logs of all edit and planning transactions).

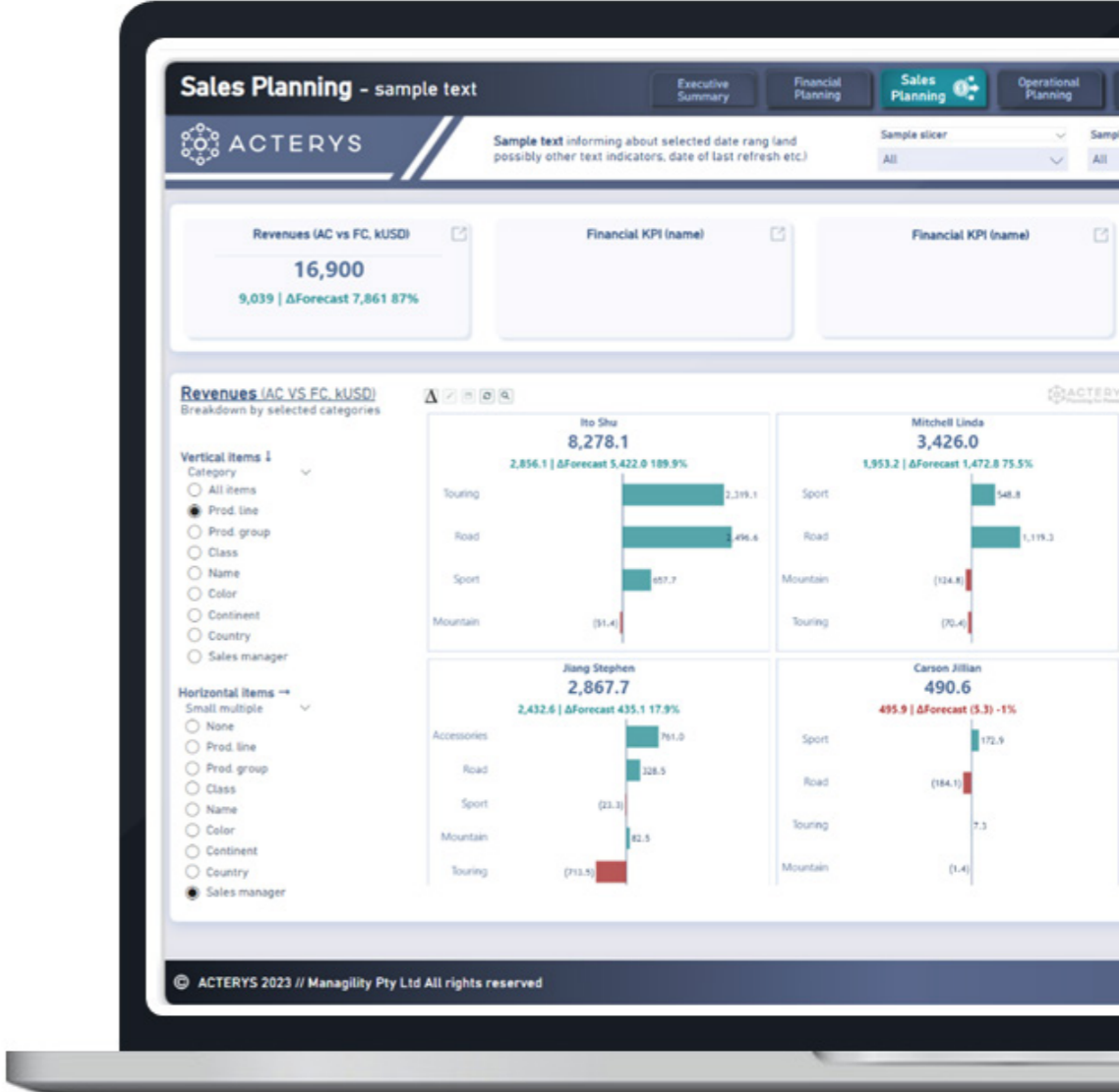
■ Accurate **financial consolidation, reporting, planning, and forecasting** for unlimited MYOB companies and other data sources.

■ **Comprehensive scenario modeling features** to uncover all potential outcomes.

■ **8 Custom Power BI visuals** and an extensive set of proven reference models to assist users with legal consolidation, cost center, HR, CAPEX, Cash Flow Planning, among others.

■ Automated, **writeback-enabled data warehouse** (star schema data model) generation for a variety of ERP, SaaS solutions and Power BI datasets.

■ Flexible deployment options for the **cloud, on-premises, and hybrid** settings



Conclusion

Businesses experience **exponential growth** as they extend their Planning, Budgeting and Forecasting (PB&F) efforts to operational and strategic areas. For this reason, it is predicted that **by 2024**, 50% of companies implementing FP&A will require their vendors to offer more features and enhancements focused on **cloud xP&A**.

With the right solution in place, you can gain a **deeper understanding of your business** and optimize its performance to drive **growth and profitability**. As you consider your options, it is important to choose a solution that aligns with your business goals and objectives and can scale as it evolves.



[Sign up](#) for a 14-day free trial today and take your analytics to the next level.

SIGN UP NOW!



About Acterys

Acterys enables instant clarity for present & future through end-to-end analytics & planning solutions for major ERP and SaaS solutions. On top of the single version of the truth data model, the solution offers out-of-the-box templates for all performance management aspects that can be easily customized by

business users in their familiar environments like Power BI & Excel. This typically guarantees significant cost savings as multiple disparate CPM solutions e.g., separate applications for data analytics, consolidation, and planning, are consolidated on a single platform based on Microsoft standard technologies.

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