



BOOST YOUR ROI

Unlocking Prophix's FP&A potential

www.prophix.com



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Journey to transformation

The goal is to maximize the value received and achieve maximum ROI by expanding product capabilities

- We'll delve into the strategies and tactics that will empower you to expand the adoption of Prophix FP&A, ensuring it becomes an integral part of your organization's daily operations.
- We understand that maximizing the value of Prophix goes hand in hand with widespread adoption, and we're here to guide you every step of the way.
- Assess/educate on a defined success path and evaluate your current solutions against the framework.



Journey to transformation





Top 3 things to move you forward



1. Selecting a champion is paramount to success – who is the ideal candidate?
2. Consider go-live support that works best with the organization's structure & business cycles
 - CSP vs. Project based, pathway or combo?
 - Pace
3. Ensure Prophix Admins are aligned with their Executive Sponsors on the end goals of what is to be deployed in the system



Top three things to move you forward



1. User adoption is critical – 100% participation and feedback
2. Engage and empower Prophix admins – CAB (customer advisory board), user conferences, Red Carpet, discussion boards, academy access
3. Show & tell with executives – tangible results & transparency



Top three things to move you forward



1. Executive Business Review + visioning session - perform an internal audit of Prophix uses with assistance of CSP, gaps, and opportunities to leverage Prophix outside of finance
2. Consider adding additional systems for data driven decision making & operational planning (i.e connecting to Salesforce, Ceridian, other systems used for reporting)
3. Think of groups or business units who rely heavily on manual processes to plan and review their performance



Top three things to move you forward



1. Documentation & ROI – Create documentation guides for admins, key cycles, & data integrations to secure investment
2. Integrate Prophix reporting into executive stakeholder review cadence, i.e. executive dashboards, board meetings
3. Forecasting the future, planning on components of the business not yet in place, scenario modelling



Top three things to move you forward



1. Your business is driven by strategy and the strategy is linked to plans & actions
2. Data driven insights and decision making
3. You can articulate or have a good idea of your ROI



ASRC Industrial: The journey to transformation



About ASRC Industrial



ASRC Industrial

ESTABLISHED

2016

by ASRC

HQ in Tempe, Arizona,
with operations in

ALL **50** STATES

30
OPERATING
COMPANIES

\$1.17B

IN REVENUE
in 2023

including

SIX

8(a) COMPANIES

4.4K

EMPLOYEES
nationwide

BONDING: **\$250M** single | **\$750M** aggregate

Office Locations



ASRC Industrial Services, LLC | Cor



ASRC Reactive FP&A



January 2021

- 8 different ERP systems
 - Largest being Viewpoint Vista
- 17k+ GL accounts
- Acquired 30 business units over 5 years, needed a reporting structure suitable for a \$1B business

Challenges

- Excel based reporting
- Data consolidation
- Collaboration

Operating Companies	30
Trial Balance Actuals (12 Months)	1
WIP Trend (12 Months)	1
Revenue Plan	1
Cost Budget	1
Capex Budget	1
People Budget	1
Financial Statements	1
Total Spreadsheets	7
Minimum Number of Spreadsheets	210
Formula Errors (3 spreadsheets x 30)	90
Preliminary	150
F&A Review / Feedback	100
CEO Review / Feedback	50
Likely number of spreadsheets	600



ASRC journey to transformation





Driving end user adoption

User experience & capabilities

- Ask/implement feedback
- Combine multiple sources of data
- Leverage the tools available

Motivation & rewards

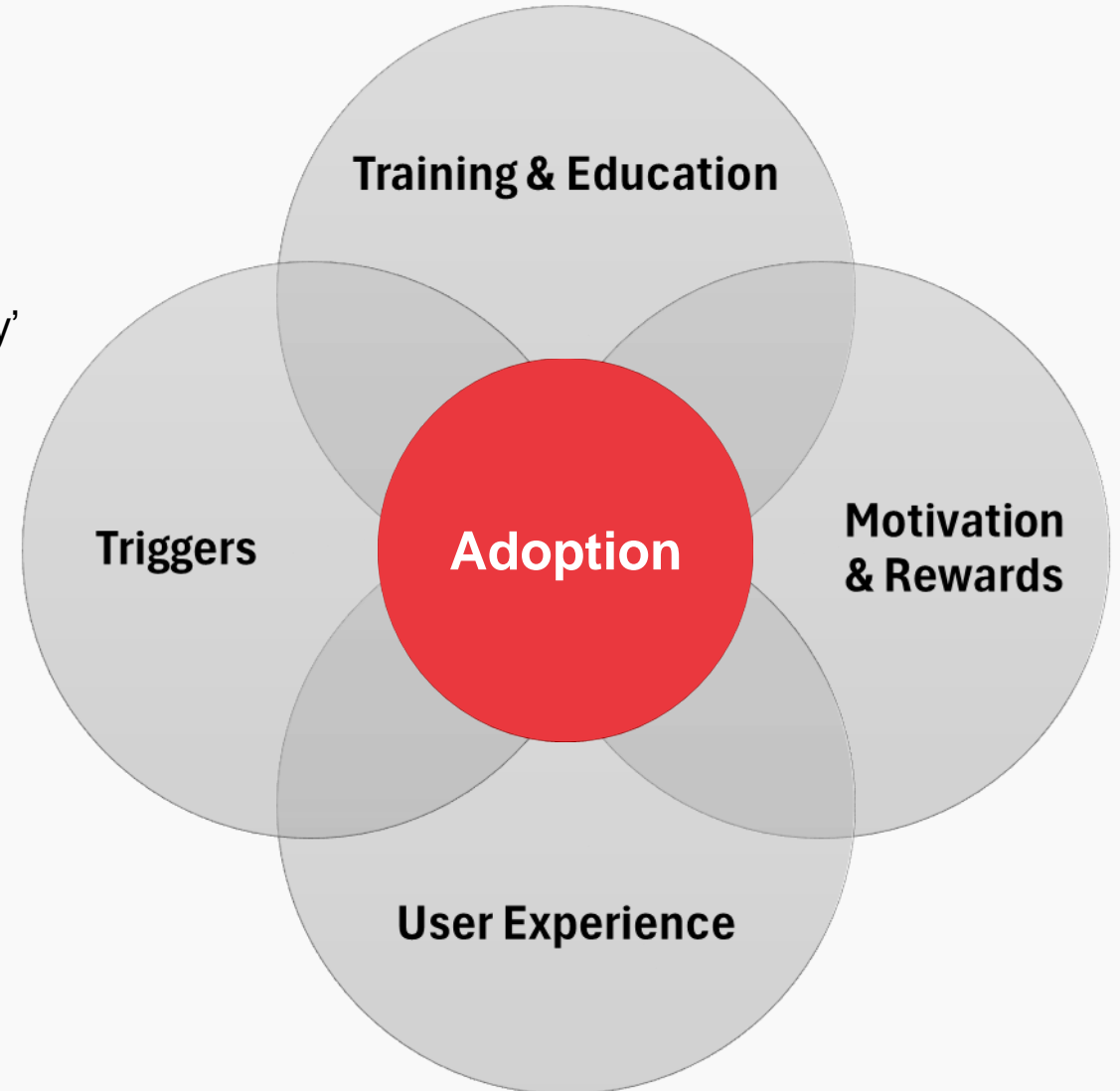
- Make it easy
- Identify time savings
- Reduce effort
- Communicate the 'Why'

Training & education

- Monthly training opportunities
- 1-on-1 training
- 'Lunch & Learns'

Triggers

- Workflows
- Report Binders
- M365 Excel Add in





Job Forecast Demo





Job Forecast results

- Accurate revenue & margin projections with real time data
 - Collaborative contributions over traditional 1-2 person forecasts
- Streamline data capture
 - Prophix performs the repetitious and meticulous data distribution & consolidation
- Saves time
 - Reoccurring
 - Saves prior period entries
 - Creates time to review rather create the forecast
- Scenario analysis
 - Compared to Plan
 - Compared to Actuals
- **Provides management with future focused data, to drive decision-making**



USA Properties: Storytime with Bob





Bob Smiley

Process Improvement and Automation Consultant
for USA Properties Fund, Inc.



How Prophix can help you achieve FP&A transformation

Here are some but not all options available to you:

- 1:1 coaching
- Semi-annual group training sessions
- Design guidance with a solutions architect /consultant
- New admin onboarding
- Supplement Prophix Academy training
- Model and performance reviews
- New builds
- Dedicated consultant and solutions architect
- Building for scalability



Additional resources



Prophix Help Center
support.prophix.com



Prophix Feedback
feedback.prophix.com



Prophix Academy
customer.prophixacademy.com



Red Carpet
redcarpet.prophix.com



Questions?



Thank you



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Game changing Prophix tools

Report generation, augmentation, & automation

Proactive

- Workflows
- Report Binders
- Favorites Manager

Innovative

- Name Sets
- Security Manager
- Linked Templates

Collaborative

- Alternate Hierarchies
- M365 Excel Add-in
- Automated Processes

FP&A Transformation

- Multidisciplinary Cubes
- Predictive Analytics
- Prophix AI



Job Forecast workflow

Workflow

- Admin creates workflow to send out M365 Template from the Jobs cube to create a tab by PM
- PM receives email with link to download to Excel
- PMs input their Revenue Forecast by Job for the Full Year
 - Actuals + Plan, then adjustments to get the Forecast
 - Roll-forward replaces the previously closed month with Actuals, but keeps the forecast in the out months
- Data get pushed back to Prophix through the M365 template
 - Allows end users to use Vlookups, excel formulas to input the data
- Submit workflow, then that kicks off the workflow automated Process to move the data to the financial cube to complete the P&L review
- Financial leader completes P&L Forecast with Overhead expenses

Result

- Collaborative forecast process, the repetitive & meticulous process has been automated utilizing Prophix, streamlining data capture and providing leadership team with accurate revenue projections rather than one entity completing the forecast.