

1. Budgeting Pain

- *“Budget season is chaos every year.”*
- *“We’re emailing spreadsheets back and forth.”*
- *“It takes months to finalize the budget.”*
- *“We have to rebuild the whole model every time assumptions change.”*

ADVANCED REPORTING FLAGS:

| Centralized budgeting, structured workflows, spreadsheet-free collaboration, faster approvals.

2. Forecasting & Scenario

- *“Leadership keeps asking for new scenarios.”*
- *“What-if modeling takes too long.”*
- *“We can’t reforecast quickly when things change.”*
- *“We’re always reacting instead of planning.”*

ADVANCED REPORTING FLAGS:

| What-if scenarios, versioned forecasts, rapid reforecasting, flexible planning models.



3. Excel Dependency (Budget + Reporting)

- *“Everything ends up in Excel anyway.”*
- *“We rely on a few spreadsheet power users.”*
- *“If one file breaks, everything breaks.”*
- *“No one knows which version is final.”*

ADVANCED REPORTING FLAGS:

| Spreadsheet replacement, version control, centralized data, finance-owned processes.

4. ERP Limitations

- *“Our ERP just isn’t built for budgeting.”*
- *“Reporting works, but planning doesn’t.”*
- *“We export everything to make it usable.”*
- *“The ERP gives us data, not insight.”*

ADVANCED REPORTING FLAGS:

| ERP enhancement, live data connection, purpose-built planning and analysis.



5. Budget Ownership & Accountability Issues

- *“Departments don’t take ownership of their budgets.”*
- *“Finance has to fix everyone’s numbers.”*
- *“Approvals take forever.”*
- *“We spend more time chasing people than analyzing data.”*

ADVANCED REPORTING FLAGS:

| Departmental input, approval workflows, accountability, controlled access.

6. Reporting Is Slow Because the Budget Is Broken

- *“Reports take too long to prepare.”*
- *“We don’t trust budget vs actuals.”*
- *“We’re constantly reconciling numbers.”*
- *“Every report tells a different story.”*

ADVANCED REPORTING FLAGS:

| Clean budget foundation, trusted variance reporting, single source of truth.



7. Avoidance of Big FP&A Platforms

- *“We looked at FP&A tools, but they’re too heavy.”*
- *“Implementation timelines scared us.”*
- *“We don’t want a year-long rollout.”*
- *“We don’t have IT resources for that.”*

ADVANCED REPORTING FLAGS:

| Mid-market FP&A alternative, fast implementation, minimal IT involvement.

8. Multi-Department / Multi-Entity Complexity

- *“Operations, sales, and finance never agree on the numbers.”*
- *“Rolling things up takes too long.”*
- *“Consolidation is painful.”*
- *“Our structure doesn’t fit rigid tools.”*

ADVANCED REPORTING FLAGS:

| Flexible modeling, multi-entity planning, rollups without rework.



9. Strategic Budgeting Triggers (High-Value)

- *“We need a better planning process.”*
- *“Leadership wants cleaner forecasts.”*
- *“We need planning that actually reflects how we operate.”*
- *“We want budgeting to stop being the bottleneck.”*

| These are PERFECT Advanced Reporting entry points.

Partner Takeaway

| If the customer is **too complex for Excel** but **not ready for a massive FP&A platform**, Advanced Reporting is exactly where they fit.