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Calumo

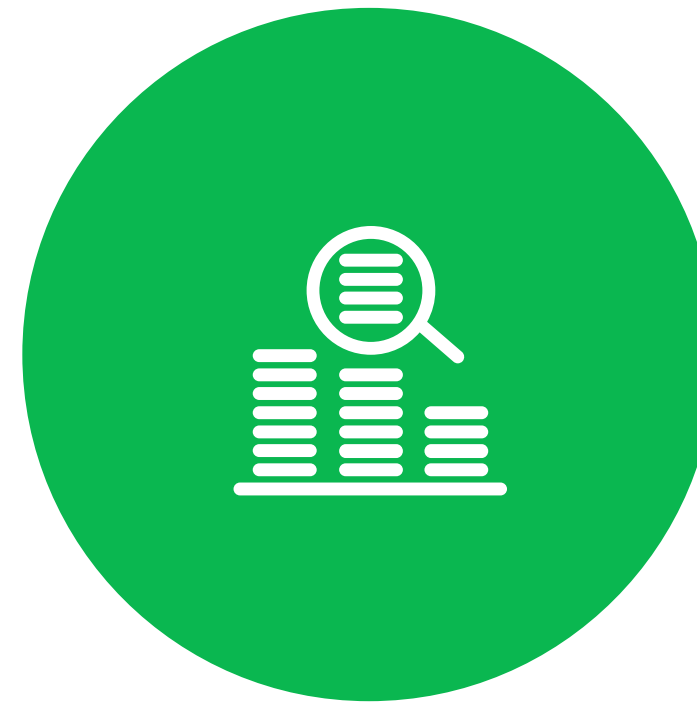**Getting the Most Out of Your Business Data**

Have you outgrown your current planning process?

Calumo
from insightsoftware

Manual planning processes take too long and are difficult to control

Missed opportunities to tighten costs or grow revenue - due to long cycle times

Planning is fragmented and lacks transparency

Business inefficiencies and manual data errors through fragmentation

Lack flexibility for strategic analysis to model different scenarios

Missed opportunities for strategic growth

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Capabilities needed for effective budgeting, planning, and reporting

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Successful organizations need robust, integrated and complete budgeting, planning and forecasting systems

Shorten Cycles to Support Continuous Planning

- Automated tasks, requests and workflows
- Repeatable, standardized process that updates to reflect changes in the ERP system
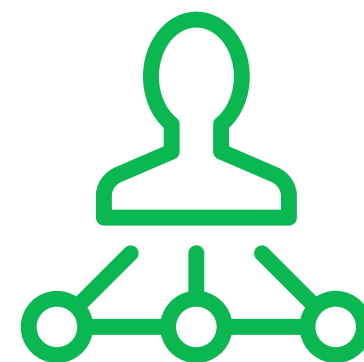
Extend Planning Beyond Finance

- Enable frontline workers participate in the planning process
- Built-in commenting functionality for effective communication across departments

Increase Planning and Reporting Accuracy

- Driver-based planning
- Advanced forecasting models
- Powerful spread rules
- System-proposed forecasting

Flexible, Easy to Use Reporting

- Self-service reporting without IT involvement
- Drill down capabilities
- Automation of manual processes

Calumo

Calumo provides automated reporting, planning, and budgeting solutions that support extended planning and analysis to enhance performance management

Build   **Analyse**   **Collect**   **Automate**

Why is Calumo different?

Calumo aggregates disparate datasets, allowing you to immediately, flexibly **connect to any ERP or source system**.

Thrive through change thanks to architectural **flexibility and agility** that helps you build out and iterate quickly.

Our solution is **more than just a plug-in**. Calumo seamlessly, powerfully integrates with MS Office, giving you power of the tools as well as your data.

Proven capability to scale and integrate despite massive complexity, thousands of users, and multiple ERPs.

Use Cases

All types of planning:

› Long Range Planning
› Revenue Planning
› Sales Planning
› Workforce Planning
› Demand Planning
› Purchase Planning
› Strategic Planning
› Capital Planning
› Continuous Planning
› Marketing Planning
› Compensation Planning
› Capacity Planning
› Segmentation Planning
› Category Planning
› Supplier Planning
› Product Planning
› Production Planning
› Scenario Planning

All types of forecasting:

› Sales forecasts
› Costs forecasts
› Cash flow forecasts
› Demand forecasts
› Rolling forecasts

Budgeting methods:

› Bottom-up budgeting
› Top-down budgeting
› Zero-based budgeting
› Hybrid budgeting models
› Driver-based modeling

Capacity to Integrate/Import Data from other Sources

Tech1

Other databases

Excel/Manual data

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On - Premise & Cloud offerings

Web

- Operational Reporting
- Budgeting/Planning
- Continuous forecasting
- Dashboards/Visualisation
- Stakeholder Reporting

Office
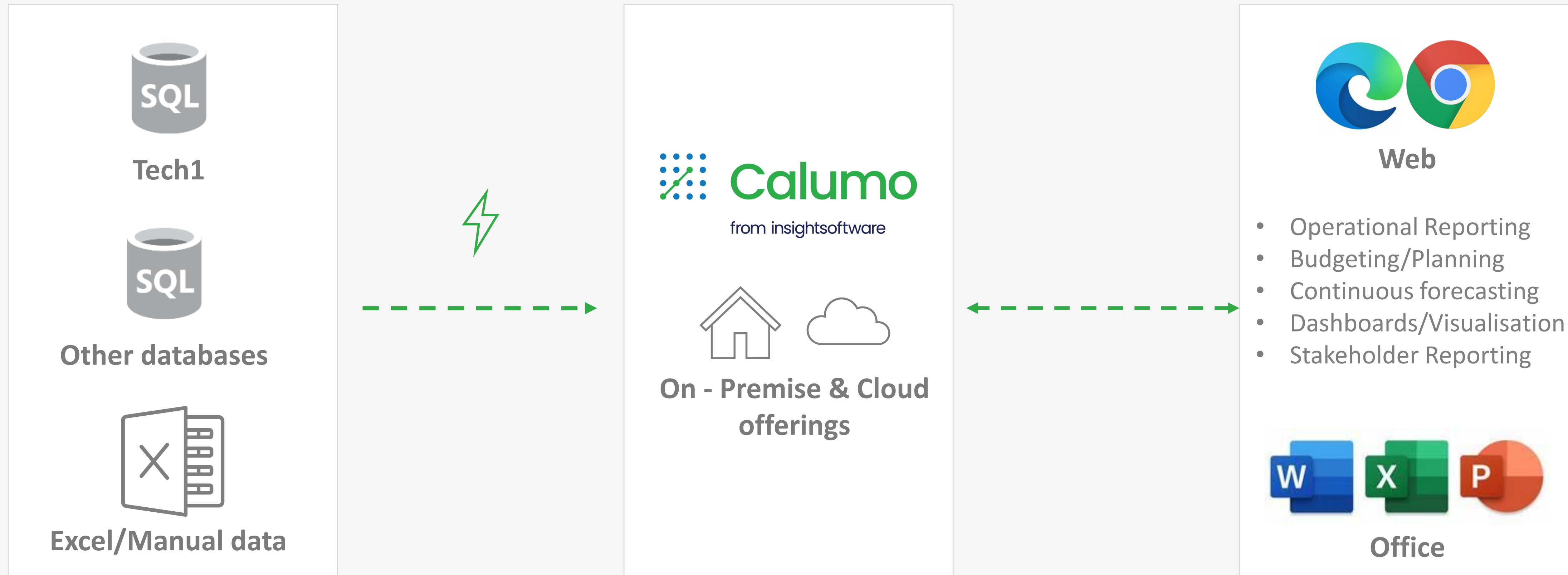
Dep of Regional NSW Case Study

> " *You need a technology layer like CALUMO that can bring together both financial and non-financial data. You need to be able to take data from a whole range of sources and be able to put them together, through a reporting platform. That helps you combine and understand the metrics of your business."*

Angus Begg

CFO, Department of Regional NSW

NSW GOVERNMENT | **Regional NSW**
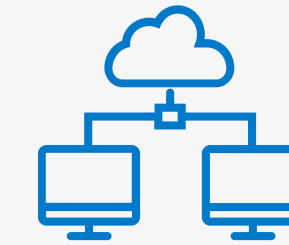
Streamlined access to data by having the ability to integrate multiple data sources
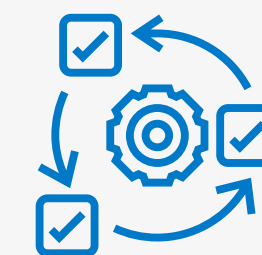
Increased **self-service access** and provide accurate results to government departments

Xref Case Study

"*The COVID-19 pandemic demonstrated the need for reliable technology and Calumo certainly comes out as a clear winner, and further confirmed that we made the right choice in 2018. It allowed the finance team to stay lean and still provide useful business insights. Our leadership team felt confident their decisions were backed with data and allowed us to keep our investors informed every step of the way out of the pandemic.*"
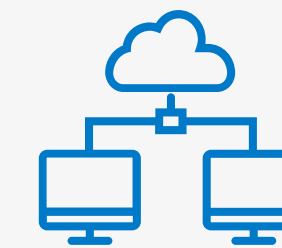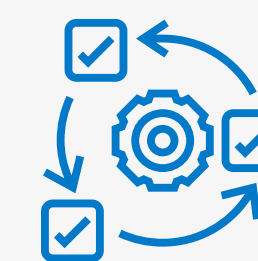
James Solomons

CFO/COO

XREF

Team feels empowered to conduct their own analysis

Integration with **new and existing Xref Systems was quick and easy**

Reports for the board and investors takes a **fraction of the time and effort** to generate

Allowed finance team to remain **lean, efficient and cash flow neutral** during Covid

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Demonstration

Optional Calumo Slides

Value of Calumo to Our Customers

Customer Testimonials

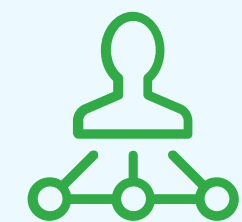*"$2m saving per annum due to improved visibility and capital control"*

"Preparation effort and time for annual and quarterly board reports has been reduced by 99% (9 days to 10 minutes)"

"Budgeting efficiency improvements have led directly to 1 Full time employee saving"

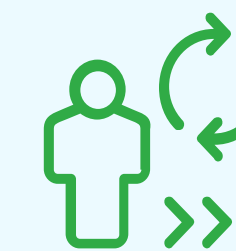*"Budgeting time and effort has been reduced by 60%"*

"Finance team efficiency has allowed finance team to reduce from 21 employees to 6"

"Finance team is 85% more efficient"

"Month end management reporting effort and time reduced by > 75%"

"Finance department showed 200% productivity improvement"

Calumo Use Cases