

Longview Planning

Planning, Budgeting and Forecasting

Today's fast-paced, global business climate is characterized by fierce competition, increased customer demand for new and better products and services, vigorous M&A activity, and the ever present need for improved corporate governance and regulatory compliance. As a result, finance professionals in virtually all organizations are under greater pressure than ever before to deliver more accurate plans, budgets and forecasts and to respond quickly and confidently as business and market conditions change.

Many finance departments still rely on legacy ERP systems, spreadsheets and data cubes for their planning, budgeting and forecasting processes. This approach is often time-consuming, cumbersome, costly, inefficient and can easily consume all the resources within the Finance department, leaving little or no time for higher-value analytical activity.

Longview Planning

Longview Planning is a comprehensive, Web-based application that drives finance processes, as well as a wide range of operational planning processes – all from a single repository of real-time, accurate information.

Powerful workflow functionality, that includes e-mail notifications and alerts, simplifies the planning, budgeting and forecasting processes and makes it easy for users to collaborate by tracking and communicating the progress of their plans and budgets.

Flexible rolling forecasts, based on real-time information, provide greater visibility into future operating performance. Longview Planning ties business plans, budgets and forecasts to strategic objectives, operational goals and targets.

Benefits At A Glance

- Gain better understanding of financial and non-financial business performance drivers
- Make better decisions based on more consistent, accurate plans, budgets and forecasts
- Improve financial transparency and integrity for better regulatory compliance
- Eliminate time-consuming, cumbersome and inefficient manual and spreadsheet-based planning activities
- Respond faster and more confidently with updated plans and forecasts as business and market conditions change
- Enable finance staff to spend more time on higher-value analysis activities rather than on data collection and validation
- Give management fast, easy access to KPI information and reports through customizable dashboards
- Ensure a single version of truth and promote a true closed loop of all financial processes by leveraging a single platform for performance management

"Finance executives are shifting their focus to performance management activities—decision support, business analysis, forecasting, and financial planning—to plan their growth strategies and measure the results of those efforts."

- Highly sophisticated modeling capabilities allow you to create, analyze and assess business rules and what-if scenarios within your planning process to help achieve your strategic goals.
- Innovative, highly scalable and secure technology architecture supports an unlimited number of users within an organization, with virtually no impact on software performance.
- All data, business rules and key drivers are centralized in a single repository of accurate information that can be accessed by all employees involved in the process.
- Finance staff can shift their focus from data collection and validation to meaningful data analysis.
- A single repository of ‘financial truth’ gives all users a unified, consistent view of plans, budgets and forecasts, allowing users to focus on decision-making rather than on data accuracy.

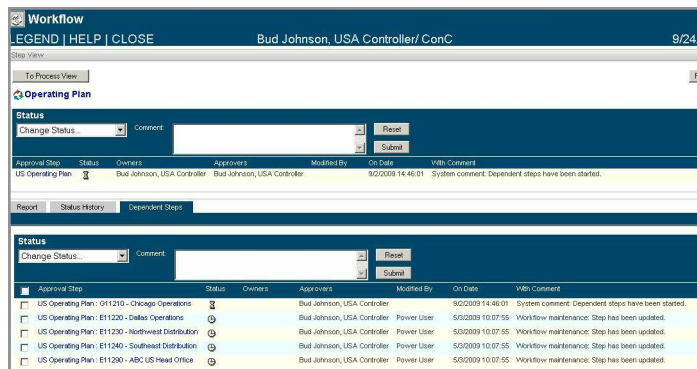
Support for Cross-Functional Planning, Budgeting and Forecasting:

- Long-Range Planning
- Employee Compensation & Benefits Planning
- Capital Expenditure Planning
- Expense Planning
- Revenue Planning
- Balance Sheet Planning
- Project Planning

Workflow Management Simplifies Enterprise Collaboration

Longview Planning simplifies collaboration by tracking information as it flows through your process, making it easy for administrators to monitor and report on the status of the plan and enabling users in departments across a global organization to participate in the planning and budgeting process.

Workflow management within Longview Planning helps easily communicate data outliers and identify process bottlenecks, issuing e-mail alerts to stakeholders throughout the process, reducing the overall planning cycle time and providing more accountability, ownership and control.



Workflow management within Longview Planning simplifies enterprise collaboration, reducing time required for the planning cycle and increasing accountability, ownership and control

Simplify and Accelerate Planning Processes with Allocations

To simplify and accelerate your planning, budgeting and forecasting processes, Longview Planning provides easy-to-use features, including: top-down allocation that automatically spreads high level targets across multiple dimensions such as products, customers, departments; allocating values based on seasonal and historical patterns; entering commentary at any level of detail; and calculating percentage or monetary increases/decreases.



Customizable dashboards within Longview Planning give management fast, easy access to key performance indicators

Rich, Easy-to-Use Web and Excel Interface

Users can securely access information from any location, inputting and viewing data quickly and easily in real-time. Results are available dynamically and can be viewed ad-hoc via the Web or Microsoft Excel. Longview Smart Client empowers end users by allowing them convenient and easy access to powerful, interactive modeling functionality through the web, while hiding the complexity behind it.

Real-Time Planning and Forecasting with Advanced Modeling

An essential element of an effective planning process is the ability to model financial outcomes and the business parameters and activities that ultimately drive those outcomes. Modeling within Longview Planning can be either bottom-up (i.e., vary the drivers to see what outcomes are produced) or top-down (i.e., choose a desired outcome and see how the drivers need to flex to achieve it).

Unlike other planning solutions that focus on financially oriented planning, Longview Planning supports the creation of enterprise-wide models based on both financial and non-financial business drivers. The powerful modeling engine allows complex calculations and limitless “what-if” scenarios to be an integral part of your planning process.

	Plan	2010 Target	* 2010P What if	Var to Fcst	Var to Fcst %	Var to Tgt	Var to Tgt%
62120 - Airfare	0	0	0	-474,800	-100.0	0	0
62121 - Hotels	84,200	0	0	-84,200	-100.0	0	0
62122 - Per diem/travel allowance	37,969	0	0	-37,969	-100.0	0	0
62123 - Car rental	14,239	0	0	-14,239	-100.0	0	0
* 62200 - Travel and living expenses	621,728	0	0	-621,728	-100.0	0	0
62101 - Sales commissions	2,475,501	0	0	-2,475,501	-100.0	0	0
62110 - Selling bonuses	3,637,249	0	0	-3,637,249	-100.0	0	0
62130 - Entertainment Expense	186,862	0	0	-186,862	-100.0	0	0
62140 - Auto expense	668,500	0	0	-668,500	-100.0	0	0
62145 - Auto expense - Op'g costs	491,061	0	0	-491,061	-100.0	0	0
62150 - Advertising	3,637,319	0	0	-3,637,319	-100.0	0	0
62180 - Other selling expenses	630,895	0	0	-630,895	-100.0	0	0
* 62200 - Total selling expense	12,287,112	0	0	-12,287,112	-100.0	0	0
* 64000 - Total general & administration - fixed	491,132	412,778	0	0	11,587	-2.9	412,778
* 67000 - Total general & administration - variable	289,324	0	0	0	-289,324	-100.0	0
* 62000 - Total controllable expenses	12,888,628	412,778	0	-12,453,849	-96.8	412,778	0
* Travel, Living, Drivers - Travel and Living Expense Drivers	0	0	0	0	0	0	0
* H5 - Total - Total Headcount	8	8	8	0	0	0	0

Longview's powerful modeling engine allows complex calculations and “What-If” scenarios to be an integral part of your planning process

Forecast with Speed, Consistency and Data Integrity

With Longview Planning, periodic results are automatically blended into forecasts or rolling forecast periods when each reporting period closes, whether quarterly, monthly, weekly or even daily. Longview Planning also features dynamic forecasting – models are re-run based on changes to data elements fed in from other sources and an updated consolidated forecast is presented on executive dashboards – all automatically and instantaneously.

The single unified platform ensures optimal levels of consistency and data integrity for all business processes including planning, budgeting and forecasting. The sharing and reuse of data, definitions and calculations eliminates redundancy, errors and duplication of effort.

Dramatically Simplify Reporting and System Management

The hierarchy manager within Longview Planning supports simultaneous legal and management reporting views in a single environment. Its built-in financial intelligence understands balance forward and standard type rollups, as well as how accounts behave with respect to others in the hierarchy.

These features, combined with the integrated reporting and dashboarding capabilities provide a single solution that management can leverage to get the key information needed to make accurate and timely decisions.

Client Services

Longview's proven implementation methodology delivers timely and predictable results, and because knowledge transfer is critical to the success of every implementation, our Learning and Client Services teams work with you every step of the way to ensure your objectives are met. From developing training plans customized to your needs, to on-site architects and implementation staff, our knowledgeable, industry veterans will ensure you derive maximum value from your investment.

Technical Support

Our internal team of financial and technical support specialists provides customers with the best "behind the scenes" technical support services to ensure that your Longview investment delivers maximum results and performance. Our customer technical support services include: 24 x 7 support services by our technology professionals, award winning documentation and access to certified technical resources.

About Longview Solutions

Longview Solutions provides corporate performance management (CPM) and tax reporting software that leading companies such as Trustmark, Time Warner, Home Depot, Eaton, Welch's, and Integrys use to drive performance with speed, visibility and financial integrity. Since 1994, many of the world's most respected companies have been using Longview to create a single repository of financial truth from which all, or any one of the following key financial processes can be performed: Financial Planning, Budgeting, Forecasting, Modeling, Disclosure Management/XBRL Reporting, Statutory Consolidation, Management Reporting, Profitability Analytics, Tax Provisioning, Uncertain Tax Positions and Tax Data Warehouse. Longview is an Exact company headquartered in Toronto, Canada with additional offices in Philadelphia, Chicago (USA) and London (UK).

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