

Five Trends Transforming Financial Strategy and Planning in 2022

Brought to you by Center & Stratify, Originally Broadcast by FEI – Financial Executives International

Today's Speakers



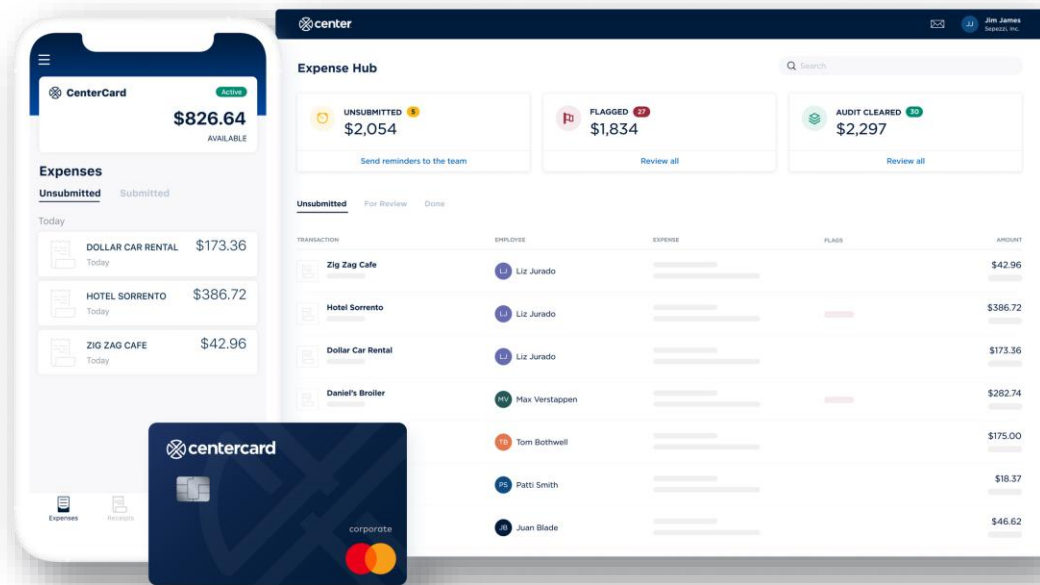
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Center

CenterCard + Center Expense



Simplify Spend

Enable spend with flexible controls and no expense reports.

Automate Accounting

Accelerate month-end close and eliminate manual reconciliation.

Optimize Expenses

Get real-time visibility and insights to reduce costs.



Intelligent Tools for Strategic Finance

Connected. Continuous. Collaborative.

Strategic Financial Planning

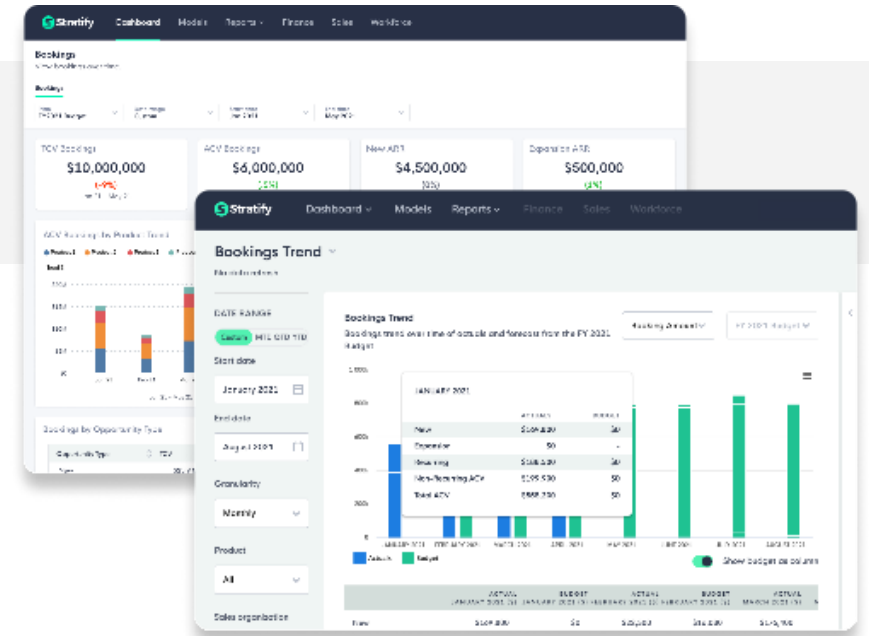
Agile companies are recognizing the importance of a continuous, comprehensive and collaborative planning process and need a software solution that can meet their needs. Stratify's next-generation cloud budgeting, forecasting and reporting solutions are designed to enable finance teams to be more strategic and engage stakeholders across the organization in a continuous planning process.

Workforce Planning

Strategic workforce planning allows organizations to hire the right people at the right time and at the right cost. Stratify's workforce planning solution enables finance, human resources and business operations leaders to proactively collaborate to identify workforce gaps and execute hiring plans without going over budget.

Structured Data Model

Leveraging our experience building hundreds of financial models for customers as well as our own businesses, Stratify has built a library of best-in-class, configurable models that meet the requirements of all customer types.



The Stratify platform brings teams, processes and data together to make better, faster business decisions.

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International

*“In response to COVID-19,
71% of physical finance
teams will remain remote or
mostly remote.”*



[CFOs Taking More Prominent Strategic and Enterprise-Building Responsibilities
Following Their Critical COVID-19 Work, New Survey Shows - CFO](#)

1

Using collaboration to
bring teams together in
hybrid environments



Implications for finance leaders:

1. Compensation: pay, perks, schedules
2. Budget: Planning for future workforce strategy
3. Expense management: enable employees to pay for WFH expenses
4. Modern applications: embracing the concept of collaboration
 - Moving away from “command and control”
 - Need role-based access controls for sensitive data

Corporate travel will be “90% back over the course of the next couple of years, and frankly I think it’s going to be even better than that.”



[Delta Air Lines Turns To Optimism With Returning Business Travel](#)

2

Preparing now for the return
of travel



Implications for finance leaders:

1. Improve expense management process now before travel fully ramps up
2. Onboard employees to corporate cards and expense platform
3. Plan for change in mix of travel, such as increase of internal meetings and events
4. COVID implications, including testing, monitoring, and quarantining

“67% of workers believe burnout has worsened during the pandemic.”



[Employee Burnout Report: COVID-19's Impact and 3 Strategies to Curb It](#)

3

Adopting modern applications to automate time-consuming tasks and free up time for higher-value activities



Implications for finance leaders:

1. Finance teams will rely on tech, not new hires, for efficiency and productivity improvements
2. Need to make work more engaging: Identify and automate manual tasks and biggest pain points for the team
3. Choice of tools is extremely important
4. Modern applications have lower cost of change and faster time-to-value

“75% of firms report disruptions, including:

- Production delays*
- Shipping delays*
- Reduced availability of materials*
- Increased materials prices”*



4

The rising importance of the finance team as a strategic partner to the business

Implications for finance leaders:

1. Budgets: improve nimbleness to minimize the impact on cash flows and profit margins
2. Cost recovery: improve visibility into recoverable expenses, and accelerate the charge-back process
3. Credit: More important to have strong credit to improve resiliency
4. Decision making: Decrease data latency to make better decisions

“99% of CFOs want to operate their business using real-time data. Only 16% do so.”



[The Power of the Finance Operating Model](#)

5

Real-time data as a business imperative



Implications for finance leaders:

1. Use forward-looking metrics; avoid “rear-view mirror” data
2. The data is not enough: need to synthesize data and deliver actionable insights.
3. Make data available and usable by business unit leaders to drive performance
4. Consider low-code, AI-powered tech to deliver a system of intelligence (vs. a system of record)



Five Trends Transforming Financial Strategy and Planning in 2022

1. Using collaboration to bring teams together in hybrid environments
2. Adopting software to automate time-consuming task and free up time for higher-value activities
3. Preparing now for the return of travel
4. The rising importance of the finance team as a strategic partner to the business
5. Real-time data as a business imperative

Poll #1

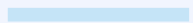
Which trends would drive the biggest impact on your business
(select all that apply)

- Using collaboration to bring teams together in hybrid environments
- Preparing now for the return of travel
- Adopting modern applications to automate time-consuming tasks and free up time for higher-value activities
- The rising importance of the finance team as a strategic partner to the business
- Real-time data as a business imperative

Next Steps

1. Take the free [Expense Management Benchmark Assessment Tool](#)
2. Check out these other free resources:
 - [Webinar: Controller Connection: How to Elevate Your Team's Impact](#)
 - [White Paper: The Ultimate Guide to Corporate Cards](#)
 - [Blog: The Path to Strategic Finance](#)
 - [Datasheet: Real-time Expense Management](#)
 - [Datasheet: Intelligent Tools for Strategic Finance](#)
3. Talk to an expert about your specific needs and see a personalized product demonstration.
 - [Center Expense Management](#)
 - [Stratify](#)

Q&A



Q&A

- How long does the implementation take for Center?
- We use QuickBooks Online. Does Center work with QuickBooks?
- How much does Center cost? Is there a per user fee?
- Does CenterCard run your personal credit?
- Stratify Questions?