

Solution Partners



Smart.
Strategic.
Sound decisions.
Planful.

Our Financial Planning
and Analysis Solution



When our clients can predict future outcomes, resulting in smarter decisions, we know we've empowered a finance organization to positively impact their company. We celebrate and build on these successes.

As Planful's largest partner, we've worked hand-in-hand across hundreds of companies to deliver the strength and functionality of the industry's leading continuous planning platform. Our people are our core strength, bringing a wealth of functional and technical knowledge to leverage on behalf of our clients.

With a dedicated team of Planful consultants, our numbers speak for themselves.

- 350 Planful clients and growing
- 60+ dynamic planning projects
- 10 years as a Platinum Partner
- 7 years average staff EPM and BI experience



Putting collaboration to work.

UHY Consulting's philosophy is grounded in working collaboratively with our clients so they can take ownership of the technology. Our Planful projects can be completed in a 100% virtual environment using web-based collaboration, offering clients the flexibility in balancing their existing workloads with the project effort.

- Client Enablement Model: Innovative workshops alternating between business requirements gathering, white-board solutioning and hands-on configuration.
- Social Project Management: Tools and techniques that ensure clients are aware of product and requirement conflicts as well as budget and resource challenges.
- Virtual Time-Sliced Engagement: Access to knowledgeable and experienced resources based on your schedule and priorities.

We use well-developed methodologies, detailed project plans and integrated change management to ensure projects are successfully completed on-time and on-budget.

Account	2021	2022	Jan-21	Feb-21	Mar-21	Apr-21	May-21	Jun-21	Jul-21	Aug-21	Sep-21	Oct-21	Nov-21	Dec-21
SALES & MARKETING	1,234,567	1,345,678	102,881	102,881	102,881	102,881	102,881	102,881	102,881	102,881	102,881	102,881	102,881	102,881
SALES	1,234,567	1,345,678	102,881	102,881	102,881	102,881	102,881	102,881	102,881	102,881	102,881	102,881	102,881	102,881
MARKETING	0	0	0	0	0	0	0	0	0	0	0	0	0	0
OPERATING EXPENSES	567,890	678,901	47,324	47,324	47,324	47,324	47,324	47,324	47,324	47,324	47,324	47,324	47,324	47,324
PERSONNEL	567,890	678,901	47,324	47,324	47,324	47,324	47,324	47,324	47,324	47,324	47,324	47,324	47,324	47,324
OTHER	0	0	0	0	0	0	0	0	0	0	0	0	0	0

Planful budgeting templates can be intuitively configured for budget level data to model allocation rules, seasonality or ad-hoc additions.



Planful allows finance teams to easily configure dashboards with relevant information unique to each dashboard user.

From beginning to end.

We're here for the long haul providing end-to-end implementations: planning, modeling, consolidations, reporting and dashboards. Based on your company's individual requirements and budget, we can utilize out of the box solutions or develop custom data integration solutions.

To ensure your long-term success with Planful, we train administrators and end users to fully leverage the platform for themselves. With production support and remote application administration, your people are covered and can do the important work to keep your company moving forward.





Let's have a
conversation!

UHY Consulting is a management consulting firm that inspires clients to imagine and realize a company with unlimited potential, leaving lasting results that strengthen an organization and its people. The firm provides a broad range of capabilities, including Business and Strategy, Organization and Operations, Finance Transformation, Technology Innovation, and Cybersecurity. UHY Consulting is an affiliate of UHY International, a top 20 global accounting network, and UHY LLP, a national Certified Public Accounting firm.

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