

Unit4 Integrated Financial Planning

Speed up your planning and forecasting

Take the lead on collaboration with integrated planning

For many companies, the annual planning phase becomes a “budgeting marathon.” Where vast numbers of Excel files are sent back and forth between departments and ultimately consolidated.

But annual planning and budgeting isn't the only responsibility the FP&A teams have. Now, more than ever, they must navigate a huge amount of data, perform analysis, and plan scenarios that drive decision-making. The CFO and their team are expected to find growth opportunities and help the business respond quickly to changing market conditions.



How does Integrated Financial Planning help?

Integrated planning solutions make budgeting more effective, efficient, and up-to-date. They are connected to your P&L, cash flow, balance sheet, sub-plans and business planning, integrating all master data, structures, and transaction data from your ERP system.

With Unit4 Integrated Financial Planning, your management and Finance teams can rely on the data they use and always access the most current picture of your financial situation, revenue, and assets. With this, financial planning becomes the basis for many business decisions.

What you can expect:

- **Increase the speed and quality** of your budgeting process
- **Deliver greater participation in planning** across the organization
- **Trust the numbers** by bringing all business data into a single, orchestrated financial plan
- **Realize significant time savings** during planning cycles and data processing
- **Focus** on the important aspects of financial planning & analysis
- Gain a **transparent overview** of the progress and results of all planning cycles
- **Respond to change and uncertainty** by simulating different scenarios
- **Easily share and interpret numbers** by using graphical visualizations and dashboards

“74% of organizations are now leveraging their planning software solutions for financial planning, but also increasingly for operational planning (61%). The increased interest in both strategic planning and forecasting is related to the challenging economic environment of the past several years. As companies have been forced to make dramatic short-term adjustments, they have had to update their forecasts more frequently.”

Source Global CPM Trends and Priorities Report 2025 – BARC and BPM Partners

Quickly respond to opportunities and market conditions with increased speed and accuracy in planning while staying compliant.

It supports users across both Finance and the wider organization with an intuitive workflow-supported planning process. Users can create reports, analyze data, and define dashboards with a range of powerful visualization options on a single, fully integrated platform. The solution retrieves data from all operational systems and external data sources, making it available to all users, on all devices, based on a consistent database.

A single solution for all your planning, budgeting, forecasting, reporting and analysis

Unit4's Integrated Financial Planning covers all aspects of planning, gives you a clear overview of your actual figures and includes forecasting capabilities, analytics and target group-specific reporting.

- Integrated P&L, balance sheet and cash flow data
- Integrated view on actuals, medium and long-term planning, and forecasting
- Strategic planning, including strategy definition settings, goals, KPI definition and reporting; optionally, the pre-configured UN sustainability goals can be applied
- Internal service charges and allocations with varying degrees of complexity
- Workflow-supported planning for both the FP&A department and the business
- Status checks during the planning progress
- Process documentation and budget comparisons across several planning cycles
- Easy management of individual user rights
- Planning for the entire group as well as its individual companies
- Powerful management consolidation, including reconciliation, IC rules and audit trail

Actuals, plan & forecast

- Bottom-up planning (detailed data collection on single accounts) and top-down planning (data input at sum level)
- Integrating operational budgets (e.g. HR, cost center, and investment planning, IC relationships, allocations)

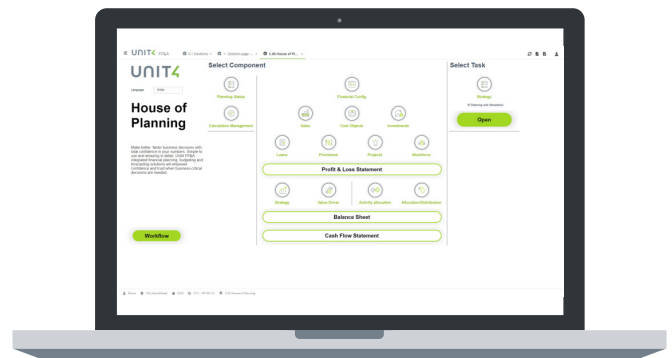


Figure 1: Start page - Integrated Financial Planning

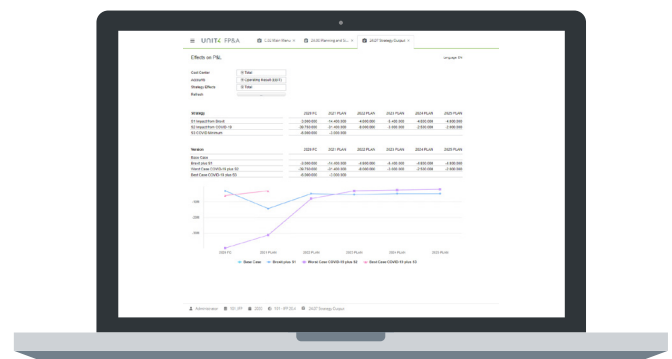


Figure 2: Scenario Planning - P&L

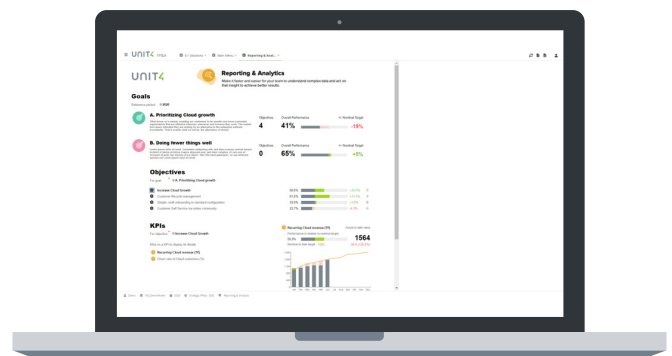


Figure 3: Strategic FP&A - Reporting & Analysis

“92% of companies confirm that the integration of strategic, financial and operational planning creates high added value to corporate management.”

Source Global CPM Trends and Priorities Report 2025 – BARC and BPM Partners

- Scenario planning based on sales, costs, financial data, and KPIs
- Visualization of scenario impacts on P&L, balance sheet, and liquidity
- Multidimensional view, e.g. according to regions, products, customers, etc.
- Modern methods such as rolling forecasts, value-driver based planning, and frontloading
- Smart Forecaster leveraging AI to forecast revenues, costs, and payments arrival
- Additionally, AI-powered automatic data entry checks support planners

Discover Unit4's FP&A solutions:

- Single solution for planning, forecasting, reporting, and analytics
- Built-in, ready-to-use business content helps you speed up time to value
- Proven, highly secure models
- Business-configurable platform leverages autonomy
- Easy-to-use and web-based for teams within and outside of Finance
- AI-powered tools leveraging planning and forecasting
- Rich graphical and interactive visualizations and dashboards
- Easy drill-down to receipt level
- Cloud with MS Azure or on-premise operations
- Fully integrated with the Unit4 ERP and HCM and flexible integration with third-party vendors

Reporting & analysis

- Standard and ad hoc reporting
- Individual reports for different user groups available at any time
- MS Office add-in to automatically fill-in and update board presentations
- Automatic report distribution
- Covering local GAAPs and IFRS accounting standards
- Deviation analysis and commenting on effects
- Variance analysis, including conditional formatting to help highlight deviations
- Ad-hoc analysis, hit lists, and benchmarks
- Automatic target/actual and year-on-year comparisons; aggregations

Customer Impact

“The Unit4 team quickly got to understand our business. They were very good at listening to our requirements and drawing upon their knowledge of the product to meet our specific requirements.”

Claire Birch, Head of Reporting, WSP, UK

“We are pleased to have a solution that uncovers real-time financial and people insights so we can focus our energy on our real purpose and business objectives.”

David Adames, CEO of the Niagara Parks Commission, Canada

