

Solutions for a better working day.

More effective, more secure and more fun.

Effectplan takes organizations from a conventional budget to operational planning where you use rolling and activity-based forecasts. The company gets a better understanding of its planning and a simplified process that cuts down the time spent on budgeting and forecasting. More secure, smarter and giving you control over the future.

Whatever your position or industry, you get a unified platform that meets your specific needs over several processes. Now you get a planning solution for your financial and operational requirements with all the functions an organization could need for its planning:

- Administration
- Planning with budgeting and forecasting (free dimensional planning for lines, projects, products and production)
- Operational planning
- Plan reporting
- Analysis (embedded)

Financial and operational planning – better control over the consequences

When you compile all your budgeting processes, you get a clear understanding of the financial consequences of business decisions in your strategic, financial and operational plans. This guarantees you better control over the outcomes of the strategies.

Budgeting, planning and forecasting – link your strategy to plans

In most organizations, operating activities are not clearly linked to the business strategy. It's time to change that. Effectplan enables you to unify all budgeting, planning and forecasting processes in a single solution. Work from strategic targets and operating levels to a consistent planning process throughout the organization. You get facts that link your strategy with your plans – and a quicker, simpler and more exact planning cycle.

Control and openness on multiple levels

Effectplan enables you to compile and get full control over budgeting, planning and forecasting process on three different levels: the strategic level, the financial level and the operational level. Improve accountability and openness in an audit trail with a close connection between all planning processes. You get a complete audit trail over the planning processes and a joint model for all types of planning, including strategic, financial, operational, production and HR.

Rolling forecast without manual effort

Breakdown targets into months and use rolling forecasts without any major manual effort. Or why not put sales and sales-related costs on a rolling basis and leave fixed costs in a budget as before? This allows you to put parts of your variable expenses and revenues on a rolling basis and minimize the time spent on them.

Tip: Link global and operational drivers so that the job is 80% done before you even start. But make this accessible throughout the business so that sales managers can enter and confirm their targets on an ongoing basis. Because it is fun to plan, and if you know your business, you'll be good at hitting the targets.

Go from strategic planning to specific targets. For clarity and collaboration within your organization.

Go from communicating targets and strategies at a high level to developing annual operating plans, rolling and long-term forecasts with full control and modeling – all in one solution.

Operating activities are usually disconnected from the business strategy, planning and performance. They should be connected, not living in isolated worlds. This is where Effectplan comes in to combine budgeting processes – from strategic to operational.

Effectplan adapts to function in line with your business. Effectplan can handle a high strategic level, and penetrating, detailed planning models that provide greater insights into and influence on profitability, the bottom line, strategic plans and operational implementation. Advanced functions support your strategic planning and short-term forecasts.

Major advantages for all positions:

- Senior management engages in strategic planning and then adopts and disseminates the company's targets and targets for the entire business.
- CFOs and controllers can quickly compile and manage plans, link operational and financial plans, compress the budget process and see the overall financial effect of various strategic decisions.
- Functional management monitors and manages several scenarios and their impact on the company's expenses, revenues and P & L.
- CIOs implement a single user-friendly solution that supports numerous planning processes, optimizes IT resources and distributes IT costs simply. Easily integratable with other ERP system standards and cuts costs for administration and maintenance. Choose SaaS or your own environment.
- Managers can assess the financial consequences of decisions on strategic implementation, manage planning processes (strategic, rolling forecasts, regular forecasts, HR plans, production plans, resource plans) and simulate the financial consequences of different possible choices.

Annual plans or rolling forecasts – adapt to new conditions

Once the budget is adopted and the year begins, you will want to make certain changes to adapt to the new conditions at the time. Go ahead and do it. Most organizations have an annual budget that quickly becomes outdated. Organizations need to quickly adapt to changed circumstances to be able to manage all operational internal and external events and have a forecast based on the most recent results and future expectations as a reference to the outcome to be able to manage all the operating internal and external events.

With Effectplan, it is easy to develop periodic and rolling forecasts, because all of the data is available in the same model. This means that it is easy to add the latest actual values. Effectplan stores actual and historic data and can create forecasts over financial years. Strategic plans and annual budget information are available for analysis and comparison. You can also combine the annual budgets with certain expense and revenue classes on a rolling basis.

- Combine periods from actual values, budgets and several different forecast versions without integration or data capture.
- Use the same templates, reports, analyses and instrument panels for budgeting, planning and forecasting.
- Keep the same rules, calculations and formulas for budgeting, planning and forecasting.
- Use a common reporting structure.

HR planning

Personnel expenses are crucial and take a lot of time in budgeting and forecasting. But sometimes, you get stuck spending too much time on the details instead of using drivers. Improve the model for the staff budget and work more flexibly. And improve the bottom line quality which usually can account for as much as 80% of total operating costs.

This is precisely why many companies choose Effectplan for their HR planning. Effectplan is built to function in line with your business and give valuable insights into the origin of personnel expenses and changes in personnel expenses, including in relation to ancillary expenses and staff-related revenues.

- Manage resources using FTEs and drivers.
- Measure planned staffing and the company's demand and match them by changing variables such as number of employees, salaries, sickness absences, efficiency, staffing, prices etc.
- Simulate staff requirements with operational plans.
- Identify P & L and the effects of staffing scenarios.
- Set a budget for actual personnel expenses on the individual or group level or use drivers for all personnel expenses.
- Use global drivers that affect the entire resource dimension or part of it.
- Move staff between departments without any major effort.

Cost distribution targets and profitability

Are you looking to be able to determine which products, customers, segments or other factors affect profitability and then monitor how much they contribute on an ongoing basis? With Effectplan's cost distribution and analysis, it is easy to put all costs in the right relationship. Set expenses and revenues directly to a product, customer or segment and use relationships to reduce data entry and run simulations.

- Distribute expenses and revenues to different dimensions completely freely.
- Combine distributions with the workflow process and report the results in templates, but without the user being able to influence the results.
- Use drivers to distribute expenses and revenues (revenues, quantities, number of employees etc.).
- Generate reports that visualize the results of different distributions.
- The actual data is stored in Effectplan and is used as a basis for distributions.
- Show relationships and distributions for cost centers, revenue centers, resources and their relationships.
- Manage financial models using free dimensions and analyze the data on the detail level. Uniformity and structure give peace of mind.
- Manage the process and responsibilities on all levels with the same flow where dimensions and relationships are used in planning and consolidation.

Project planning as a part of the operating plan

Let project planning be a part of the operating plan. The project's costs or revenues are often isolated, but with Effectplan, the project planning can be unified with the department's planning process. The project can also be free but linked to a cost center or be completely free as a tool for project managers. You can easily track the effect of the plan linked to a project, departments and P & L.

Users enter their own projects without burdening central administration. The IT department can manage the projects as a way to distribute costs down to the level of operations, and you can also use Effectplan for internal projects and distribute costs on the basis of project outcomes on an ongoing basis.

Effectplan provides a simplified and automated process by combining all related processes.

- Select whether to distribute the costs to projects and on what level of detail.
- Support planning for projects such as construction and civil engineering projects.
- Estimate total project costs and assess/prioritize project financing.
- Understand the financial effect of adding, removing or delaying projects.

Reporting and analysis

At least 60% of budgeting time should be spent on analysis. You have that time available when you lighten the load from the budgeting and forecasting process. Don't invest in new BI solutions – use your existing tools and embed them in Effectplan. You get reports and planning analyses with reports matched to what you have entered in Effectplan.

- You have your own report generator on the screen, with the capability to design the appearance and the capability to export to XLSX, PDF and DOCX.
- Capability to embed your current BI solution in Effectplan.
- Open and documented data model so that you can create your tracking straight from the database yourself.

Create customized analyses to display data graphically – both from Effectplan and other operational management systems. Track and analyze the plan in real time via a user-friendly control panel and improve management. You get better and faster decisions.

Effectplan gives all users a visual way to track key trends via indicators (KPIs). The control panels are easy to create directly from existing reports in Effectplan. Select the diagram type and get the results straight away.

- Define dynamic and user-friendly panels designed independently by the user.
- Design visual graphics that display your results and write data as you wish to see it.
- Display detailed data as well as activities, adjustments and comments.
- Define strategic targets and key ratios and link to plans and outcomes.
- Spread information throughout your organization.
- Display, analyze and create activities for all your financial processes – including the actual plan, strategic plan and consolidated results.
- Get access to information on all devices – even smartphones.