



# Simplify and Automate Financial Processes

Move Beyond Excel & Drive Performance

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# Agenda

**1** What We Do

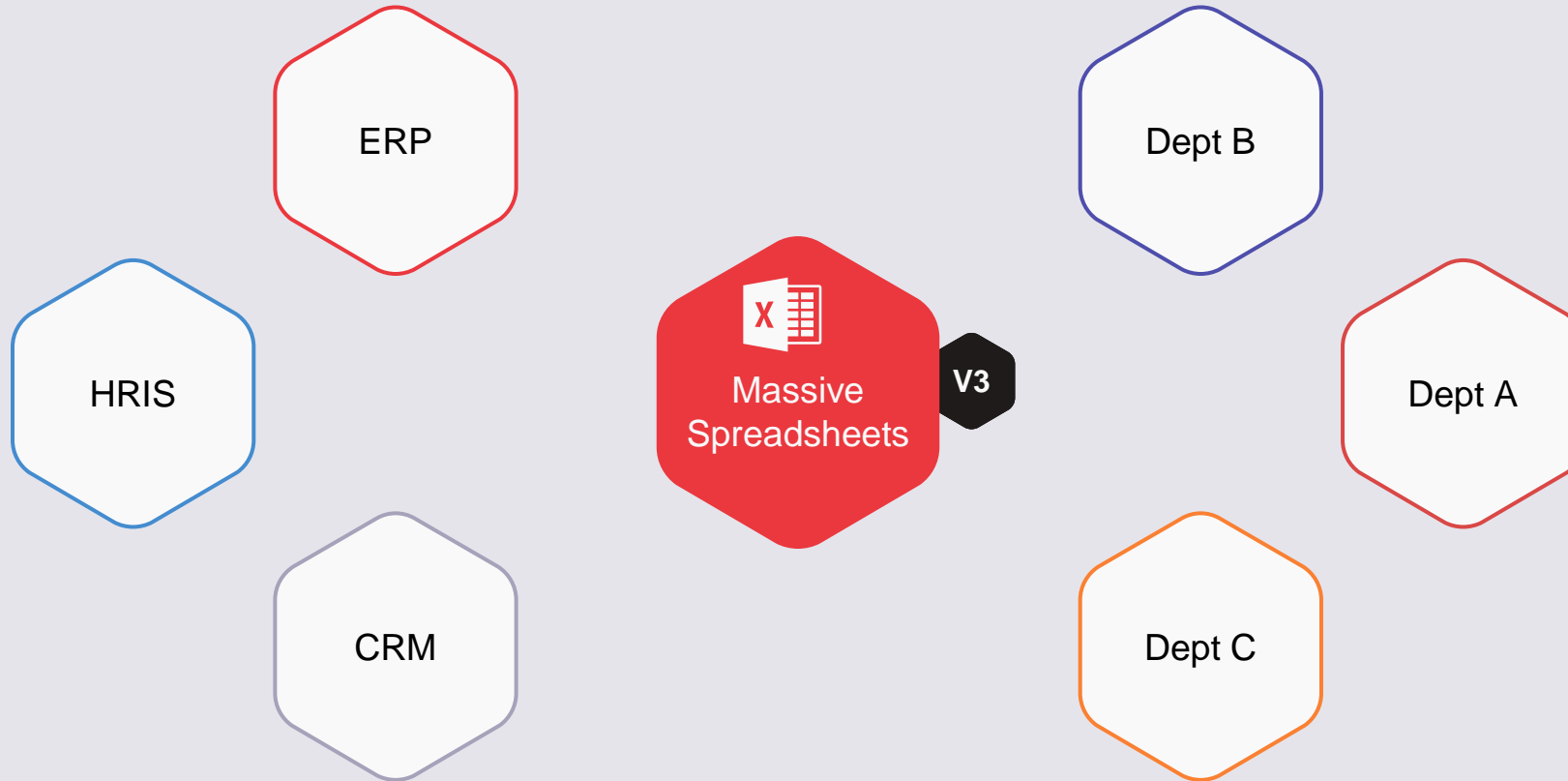
**2** Who Are We

**3** Not-for-Profit Trends

**4** Guest Speakers



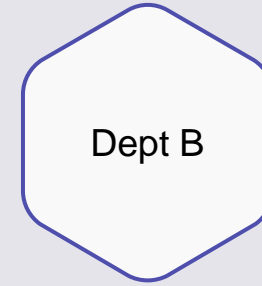
# Today, many environments look like this...



And you have all of this for **budgets, actuals and forecasts!!!**  
Resulting in overwrites, deletions, lost versions, late nights and **confusion!**



*It only gets better from here with Prophix*



Dept

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No more broken formulas

Collaborate & communicate up and down the organization

One version of the truth

Distribute reports automatically & securely

Surface key insights and analysis



# What We Do

Prophix enables you to **automate the management cycle** of consolidation and reporting, analysis, modeling, and planning.

# Who Are We

A mid-market leader in **CPM**

**3000** customers **110** countries +

Fanatical focus on **Customer Experience**

Made for **Finance** by **Finance**

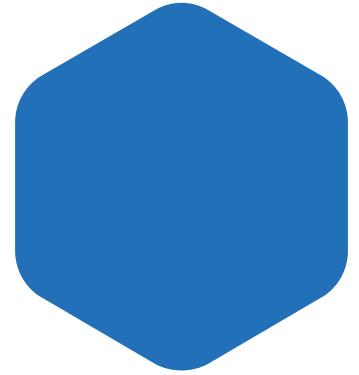
Relevant Experience with **Not-for-Profits**

**A Philosophy of Giving Back**

Quarterly Purpose-Project tied to positive results



# Not-for-Profit Trends & Challenges



## Increased Funder & Stakeholder Demands for Transparency

- More frequent and detailed reporting requirements
- Measuring the outputs, outcomes, and impact of funds
- Understanding the true cost of programs

## Increased Importance of Planning for the Future

- Forecasting, budgeting once a year is not enough
- Cashflow management and projections
- Scenario & What-if Analysis
- Strategic Multi-Year Planning

## Workforce Shortages & Turnover

- People are the #1 expense in most organizations
- Position Control & HDCT Management
- Employee Planning (Salaries, Benefits, Taxes, etc.)

## Consolidation and Analysis of Non-Financial Data

- Census & Occupancy Data
- Fundraiser & Campaign Data
- Donor & Member Data
- Employee & Salary Data



**Lutheran  
Social Service**  
of Minnesota

# Guest Speakers

## **Bob Wydra**

Lutheran Services of Florida – CFO  
Prophix since 2016

## **Kyle Larsen**

Controller - Lutheran Social Services of Minnesota  
CFO - Children's Home Society of Minnesota  
Prophix since 2015





# Thank you



Jakub Szewczyk

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