

simplifying
what's next
in budgeting

GENERAL OVERVIEW
DECEMBER 2022

What's budgyt ?

A dynamic platform that simplifies financial planning without sacrificing the details. Built to empower team-based budgeting, agile forecasting, and granular reporting.



AGILE
PLANNING



DYNAMIC
FORECASTING



BALANCE SHEET
& CASH FLOW



ADVANCED REPORTING
& VISUALIZATIONS

Budgyt eliminates complex spreadsheet hurdles from FP&A processes, replacing it with user-friendly dashboard navigation, real-time consolidation, and data you can actually trust.

With powerful built-in tools for seamless budget collaboration, transaction-level data analysis, and detailed balance sheet & cash flow forecasting.

make better decisions faster and stay fully prepared for **what's next**





FINANCE DIRECTORS

CHALLENGES:

- ▶ Lack of admin and support staff
- ▶ Manual, time-consuming data parsing and budget creation
- ▶ Overly-constructed templates difficult to learn or understand
- ▶ Unaware of solutions beyond excel but aware solution exists
- ▶ Open to any additional help; but unaware of where to find it

GOALS:

- ▶ Submit budgets in a user-friendly tool
- ▶ Access your own actuals directly in Budgett
- ▶ Feel confident with unbreakable formulas and change tracking

FREE TRIAL

BOOK DEMO



CFO'S & VP'S OF FINANCE

CHALLENGES:

- ▶ Streamlining processes to keep up with a growing business
- ▶ Agile reforecasting, scenario planning, and cost allocation
- ▶ Quick reporting of accurate, real-time data
- ▶ Open to technology to streamline processes
- ▶ Actively adopting tech to better prepare for tomorrow

GOALS:

- ▶ Improve the quality of budget discussions
- ▶ Improve data integrity
- ▶ Simplify & streamline processes to produce better results

FREE TRIAL

BOOK DEMO



CEO'S & FOUNDERS

CHALLENGES:

- ▶ De-centralized operating systems with disconnected software tools
- ▶ Secure collaboration between dept's and teams
- ▶ Cross-border budgeting
- ▶ Complicated operating structures
- ▶ Seamless integration between software tools
- ▶ Solutions with workflow & automation capabilities

GOALS:

- ▶ Get access to real-time data & reports
- ▶ Better understand business performance & key drivers
- ▶ Trust the data presented to you

FREE TRIAL

BOOK DEMO



FINANCE TEAMS

CHALLENGES:

- ▶ Manual, time-consuming data parsing
- ▶ Difficulty collaborating with team members
- ▶ Assumes they lack the funds to adopt latest technology
- ▶ Unaware of affordable software solutions
- ▶ Little insight into the capabilities of intuitive software

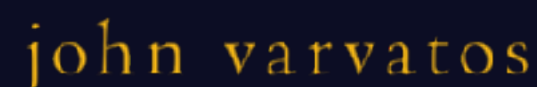
GOALS

- ▶ Eliminate time spent on manual tasks
- ▶ Verify numbers in real-time with instant bottom-up proof
- ▶ Make better decisions faster

FREE TRIAL

BOOK DEMO

we serve a wide range of clients across multiple verticals



“ Rock ”



TABS & LINKS
WITH EXCEL

Budgeting in Excel is the antiquated way of doing financial modeling and planning. Why put up with mediocrity and expose yourself to risks?

“ Rocket ”



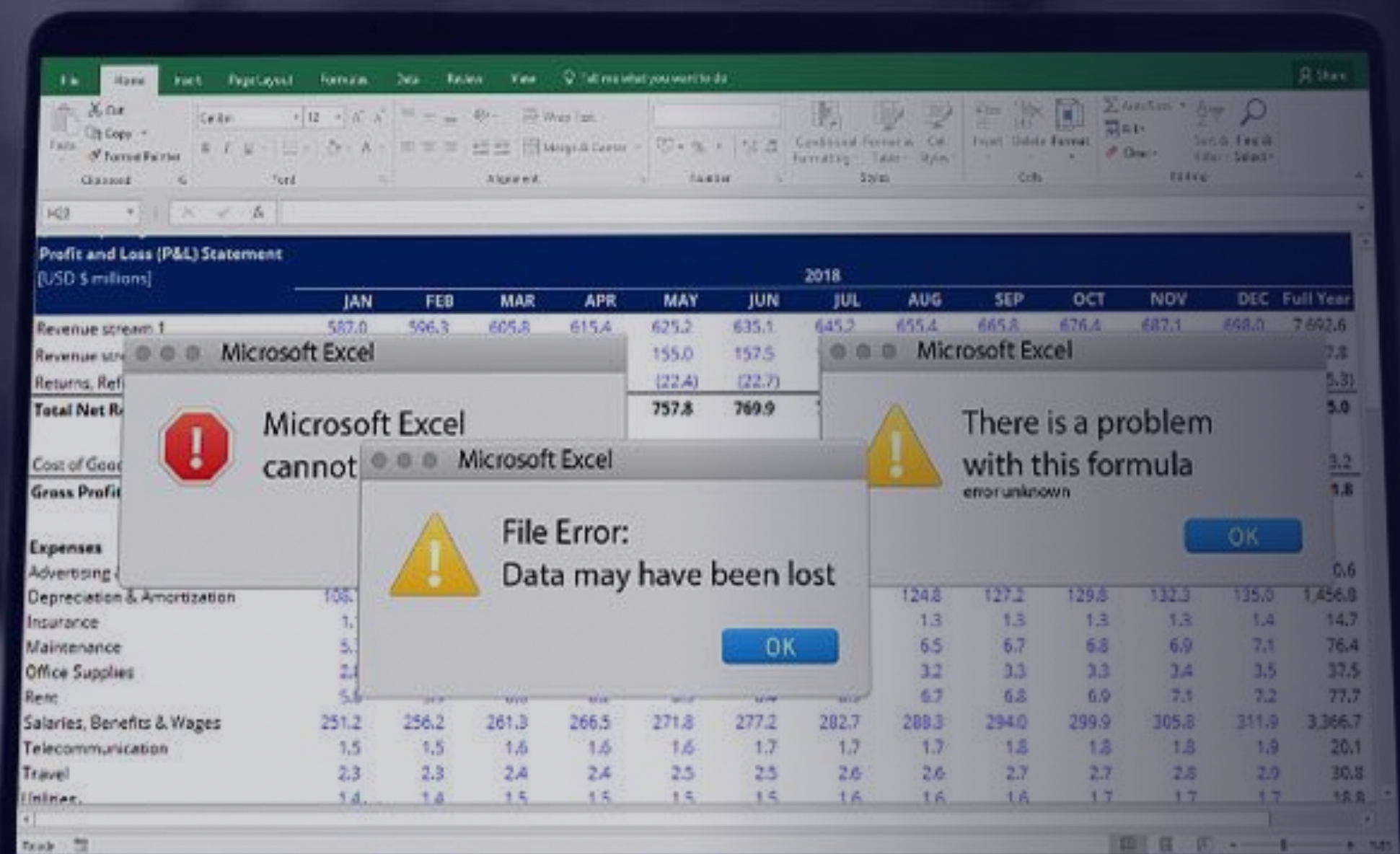
HYPERLINKING
WITH BUDGYT

Our platform guarantees accuracy and accountability, while also democratizing the budgeting process.
Thus eliminating the need for Excel.

Save **80% in manual time & labor costs** by transferring your process from spreadsheets to Budgyt



How much is Excel truly costing you?



The average finance staff member spends 25% of their day processing data in Excel...¹

...and that's a whole lot of time that could be spent on more important tasks. Budgyt can give you that time back, along with anything else it's costing you like data integrity, planning flexibility, your sanity...the list goes on. Use the calculator below to find out how much Excel is costing your organization and what you could save by switching to Budgyt.

DOWNLOAD OUR COST SAVINGS CALCULATOR



WHAT YOU PUT UP WITH IN EXCEL

- ▶ Inability to securely & confidently collaborate
- ▶ Endless spreadsheets & tabs
- ▶ Cells that can be easily overwritten
- ▶ Risk of broken formulas and data errors
- ▶ Labor-intensive spreadsheet maintenance



WHAT YOU GAIN WITH BUDGYT

- ▶ A single platform to input, track, and report data for all departments and cost centers
- ▶ Permissible user access with control over data changes and/or approvals
- ▶ Unbreakable formulas & data accuracy
- ▶ A user-friendly budgeting experience
- ▶ Built-in dashboards, reports, and visualizations

the list **goes on...**

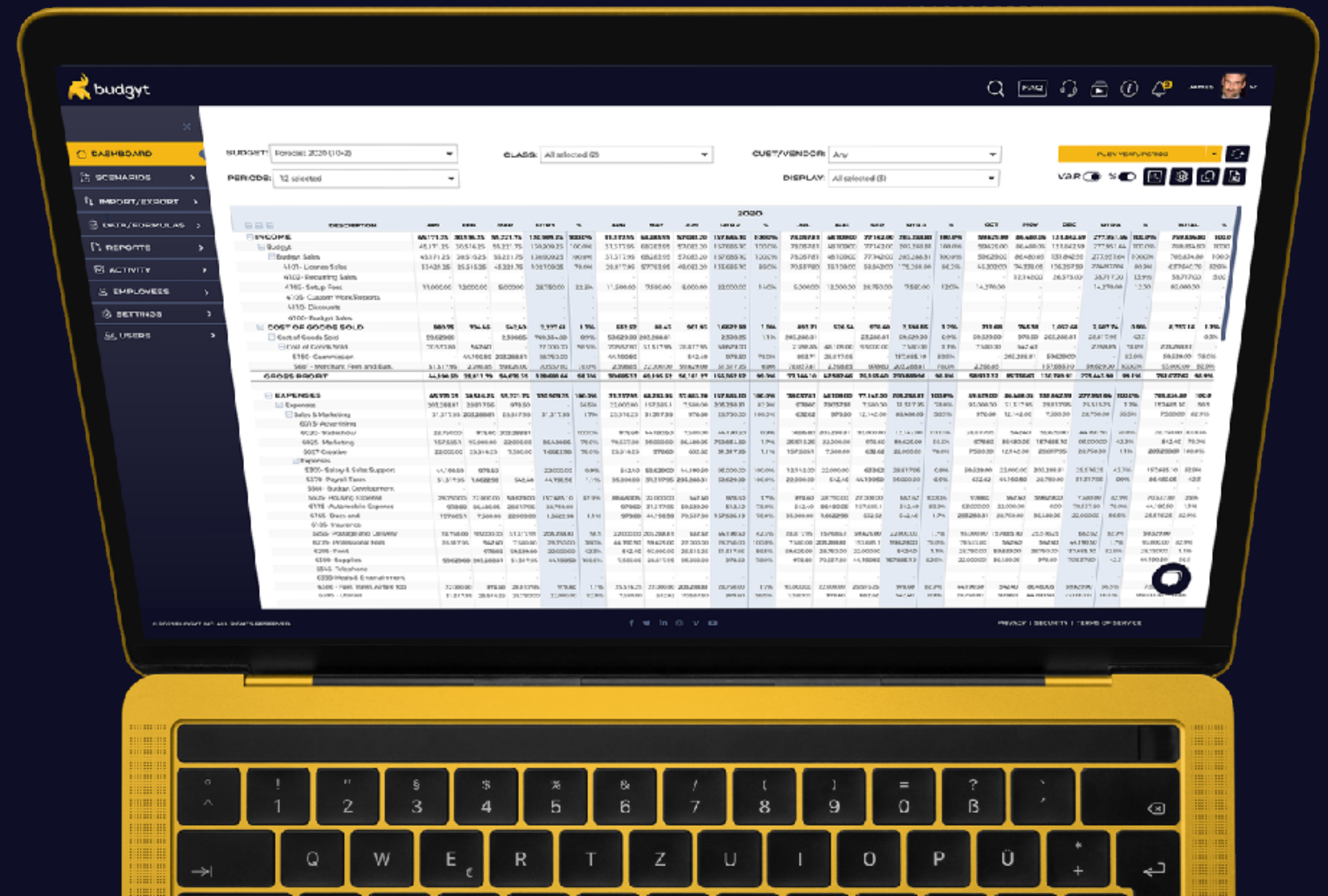
AVERAGE # OF
BREAKABLE FORMULAS
USING EXCEL

2,400+

AVERAGE # OF
UN-BREAKABLE FORMULAS
USING BUDGYT

20

DOWNLOAD BUDGYT VS. EXCEL REPORT



why choose budgyt?

SIMPLIFIED BUDGETING. STREAMLINED PROCESSES. ACCURATE PLANNING AND FORECASTING.

Budgyt is a powerful budgeting & forecasting platform that takes financial planning out of Excel and into the future.

With built-in quality assurance, no-code configuration, and simplified UX/UI, finance teams can navigate highly efficient processes to make better decisions faster. Seamlessly collaborate on the budget, streamline manual tasks, and trust your data is accurate and free from errors.

Budgyt gives you the power to stay two steps ahead and fully prepared for what's next.



TIME SAVINGS

- Streamlined data entry toolkit with automatic rollups & consolidations
- Unbreakable formulas & links
- Detailed payroll budgeting in minutes



SECURE COLLABORATION

- Unlimited users at no additional cost
- Permission settings at function, department, scenario, and GL account levels
- Activity log & change tracking



UNLOCK INNOVATION

- Revolutionary no-code formulas with universal settings
- Hyperlinked drill-down technology to transaction level
- Built-in balance sheet & cash flow forecasting



We function as a **(flexible & agile)** single source of truth

Say goodbye to endless spreadsheets & tabs, separate systems, and conflicting results. Budgyt centralizes your financial data & planning activity for all-in-one budgeting, forecasting, and reporting with real-time data.

UNIVERSAL SETTINGS: update your COA structure or change your settings **in one place** and apply changes globally across all dashboards, views, and reports—in other words, never waste time on redundant tasks again

DATA TRACKING & COMPARISONS: import multiple years of historical data at the **transaction level**, and run instant budget to actual comparisons directly from your dashboard

DRIVER-BASED FORMULAS: configure formulas to reflect key value drivers like **patient days & allocations** to quickly & accurately forecast revenue

DIMENSIONS: create dimensional categories for **grants, vendors, and procedures** for easy tracking, flexible scenario planning, and focused reporting

DASHBOARD REPORTING: display important reports in the dashboard to easily **monitor & update on the fly**. Export reports into an already formatted Excel template or share reports directly from Budgyt

PAYROLL BUDGETING: allocate payroll at the **department and dimension level** with built-in HR formulas for benefits, taxes, accruals, and other nuances



I am a big fan of BUDGYT. It really was a game changer for our growing business. Incredibly flexible and the reporting tools are great. It also allows you to be incredibly granular which is incredibly important to me.

JAY GODFREY | OWNER



we ensure **data integrity** & **numbers you can trust**

Get peace of mind knowing your data is always protected and only accessible to those you permit. Budgyt helps you accurately plan with bottom-up proof and makes it easy to verify & prove numbers in seconds—for both yourself and skeptical board members.

“ Budgyt gives me peace of mind when presenting the budgets to our boards and committee knowing there are no mistakes in my formulas

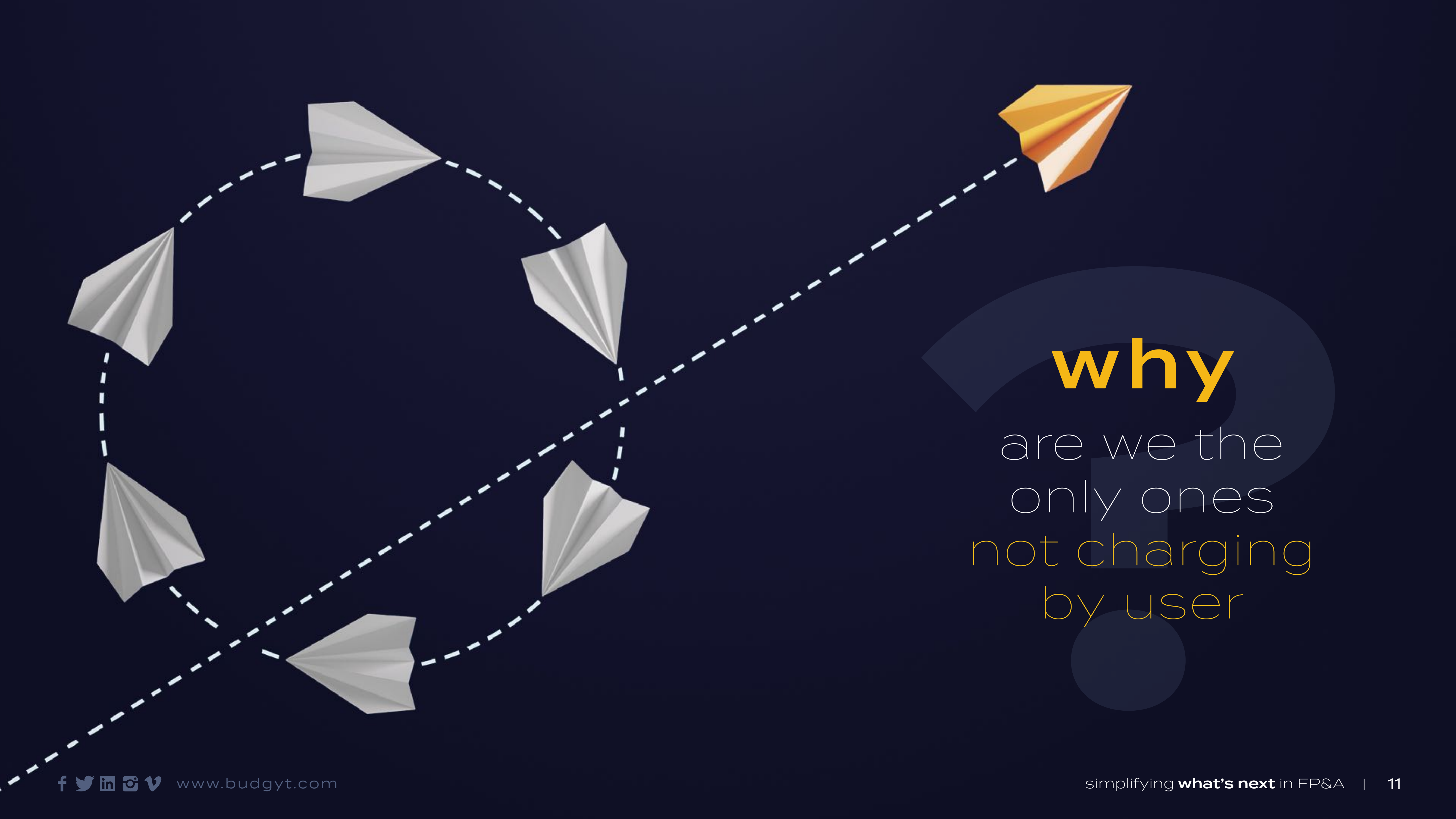


DENISE WEISS
DIRECTOR OF FINANCE & INVESTOR RELATIONS
GREATER ST. CLOUD DEVELOPMENT CORPORATION

UNBREAKABLE FORMULAS: never waste time searching for formula errors again and feel confident knowing users can't break anything

TRANSACTION-LEVEL DETAIL: build more accurate budgets from the bottom-up with easy access to GL transaction details

HYPER-LINKED DATA: prove a number in seconds with hyperlinked data that drills into transaction details & underlying schedules



why

are we the
only ones
not charging
by user

here's what we know

86% OF CFOS have increased the frequency and scope of collaboration across their enterprise, and **88% have introduced new metrics** to measure how well the finance function is performing in its influencing and collaboration capabilities. ¹

78% OF CFO'S BELIEVE that cycle times can be reduced with more self sufficiency ²

Budgyt was designed to empower secure budget collaboration so that you can feel confident inviting users into your process.

SOURCE

¹ - https://www.accenture.com/_acnmedia/PDF-172/Accenture-Finance-Central-Nervous-System.pdf#zoom=50

² - https://www.accenture.com/_acnmedia/PDF-85/Accenture-CFO-Research-Global-Short-Report.pdf

here's what **we believe**

1 Departmental self-sufficiency

Collaborating is better than hand-holding. Empower your users to be self-sufficient when **analyzing financials and submitting budgets**, so that **finance can focus on higher-value activities**.



2 Real-time & diverse data

A collaborative process in a single, cloud-based platform like Budgett gives you access to real-time and diverse data. A continuously updated view of the entire business **helps finance respond quickly and confidently to high-impact events**.



3 Better decision-making

Having a comprehensive, 360° view of all departments' financial & non financial performance metrics makes it much easier to **identify opportunities and mitigate risk**.

“We have about **50 users who regularly submit and consume information**, and Budget helped us streamline our budgeting and forecasting processes. We **predominantly use the platform as a source of truth**: no more broken formulas, flying excel spreadsheets, and consolidation nightmares.”

JASON KEMPT
VP, FINANCE & ACCOUNTING
UNITED WAY EAST ONTARIO



security you can trust

policies & documentation



Your trust is too valuable to be given: **it deserves to be earned.** Budgyt takes extensive security measures to ensure your data is always protected—and only accessible to those you permit.

THE 4 LAYERS OF BUDGYT PROTECTION:

1. Subdomain access through HTTPS SSL at YourCompanyName.budgyt.com.
2. Individuals must know the subdomain address to access your site
3. Login with a user ID and strict password credentials with options for SSO or other multi-factor authentication
4. User permissions can be set by department, functions, versions, and read-only access



CLOUD STORAGE PUTS YOU IN FULL CONTROL

Eliminate file sharing risks and accidental exposure of sensitive information

Empower users to access their budgets and analyze variances from anywhere at any time

Ensure sensitive and confidential information is **selectively hidden** when collaborating

Easily recover any accidental deletions with rolling 30 day back ups



DOWNLOAD ADDITIONAL POLICIES

INFORMATION SECURITY POLICY:

[VIEW ONLINE](#)

INCIDENT MANAGEMENT POLICY

[VIEW ONLINE](#)

ISO CERTIFICATION (27001)

[VIEW ONLINE](#)

SECURE SDLC

[VIEW ONLINE](#)

SYSTEM & APP ACCESS CONTROL POLICY

[VIEW ONLINE](#)



onboard with budgyt

In just 3 easy steps

IMPLEMENTATION PROCESS & TIMELINE

Our simplified set-up and onboarding process ensures you can reach full operation capability with Budgyt in under 2 weeks

1 Kick-off call & consultation (2 hours)
Getting to know you (and your budgets)

BUILD

2 Setup Site Structure (3-5 days)
Building your foundation

IMPORT

3 Site Review & Admin Training (up to 5 hours)
Handing over the keys



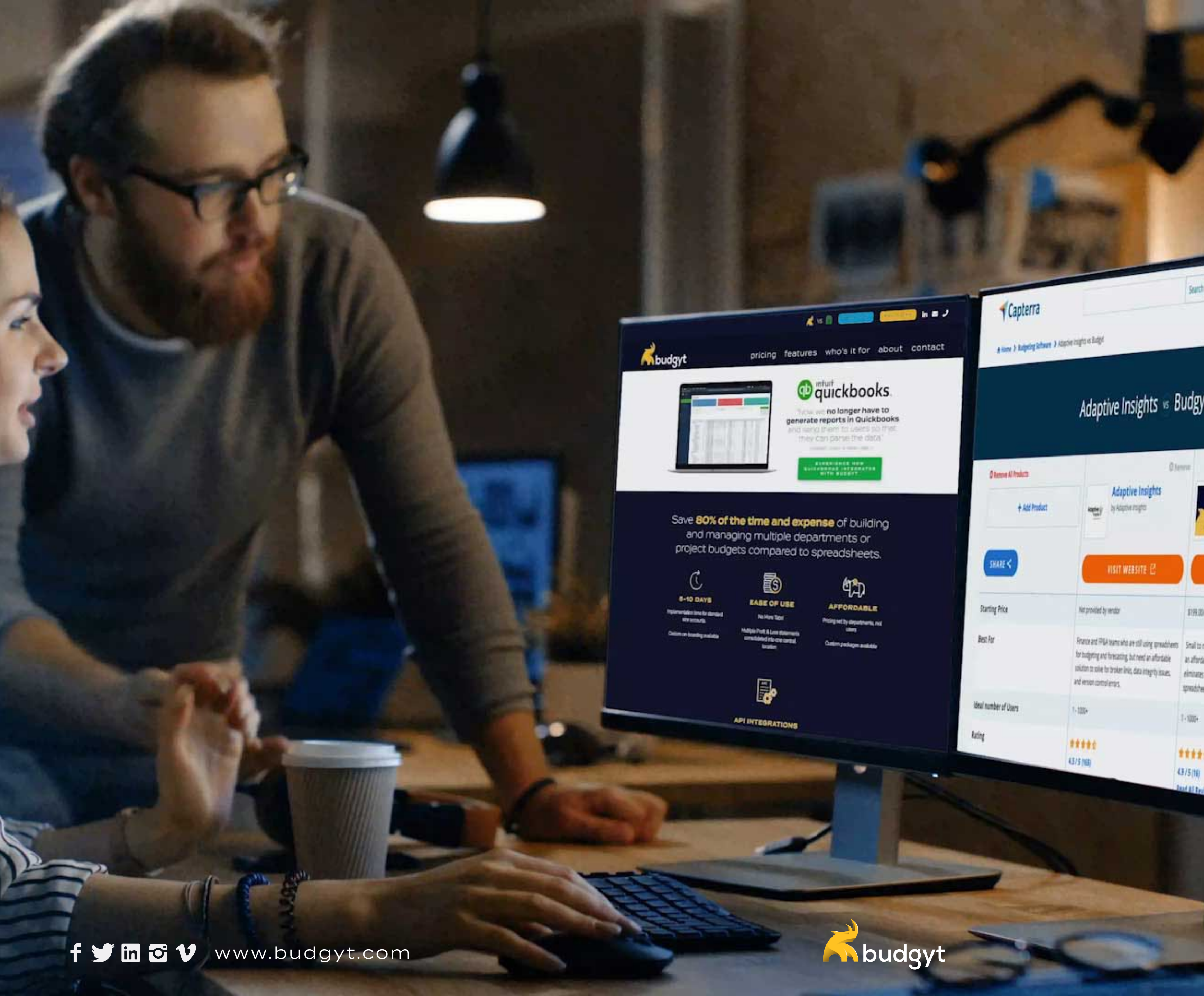
our **user retention** is **6x higher** than the industry average



We collect exports of your existing financials

We'll build a custom import template that matches your structure so you can budget the way you actualize

After onboarding, you'll use that same import template to update your financials in Budgyt whenever you need



how we stack up


**2023
WINTER
REPORT**

BUDGETING &
FORECASTING



FINANCIAL
ANALYSIS



setting **industry standards**

Budgyt awarded **10 leadership or “best-of”** rankings with a **90+ NPS** score - one of the highest amongst direct competitors



owning the
mid-market

maintaining
status in
small-business

THE COMPETITIVE LANDSCAPE

There are 3 distinct levels of software tiered **by pricing levels**

You can differentiate **by features & performance**, and know who developed it

TIER 1 - TOO EXPENSIVE (\$100K+) AND COMPLEX



- ▶ Expensive (\$100k+) multi-user multi-dept. full-service offerings but built on old technology.



Typically \$100,000+ / year

TIER 2 - VERY EXPENSIVE (\$25K+) AND COMPLEX



- ▶ High level of functionality with multi-user and multi-department comprehensive budgeting tools, but they come at a cost.

- ▶ Setup times can be measured in months, and setup fees can be above the annual rate.

Typically \$15,000 - \$50,000 / year and upwards...



SWEET SPOT OF COMPETITIVELY PRICED & INTUITIVE, WHILE COMPREHENSIVE 5-15K

TIER 3 - AFFORDABLE (\$750) BUT TOO SIMPLE

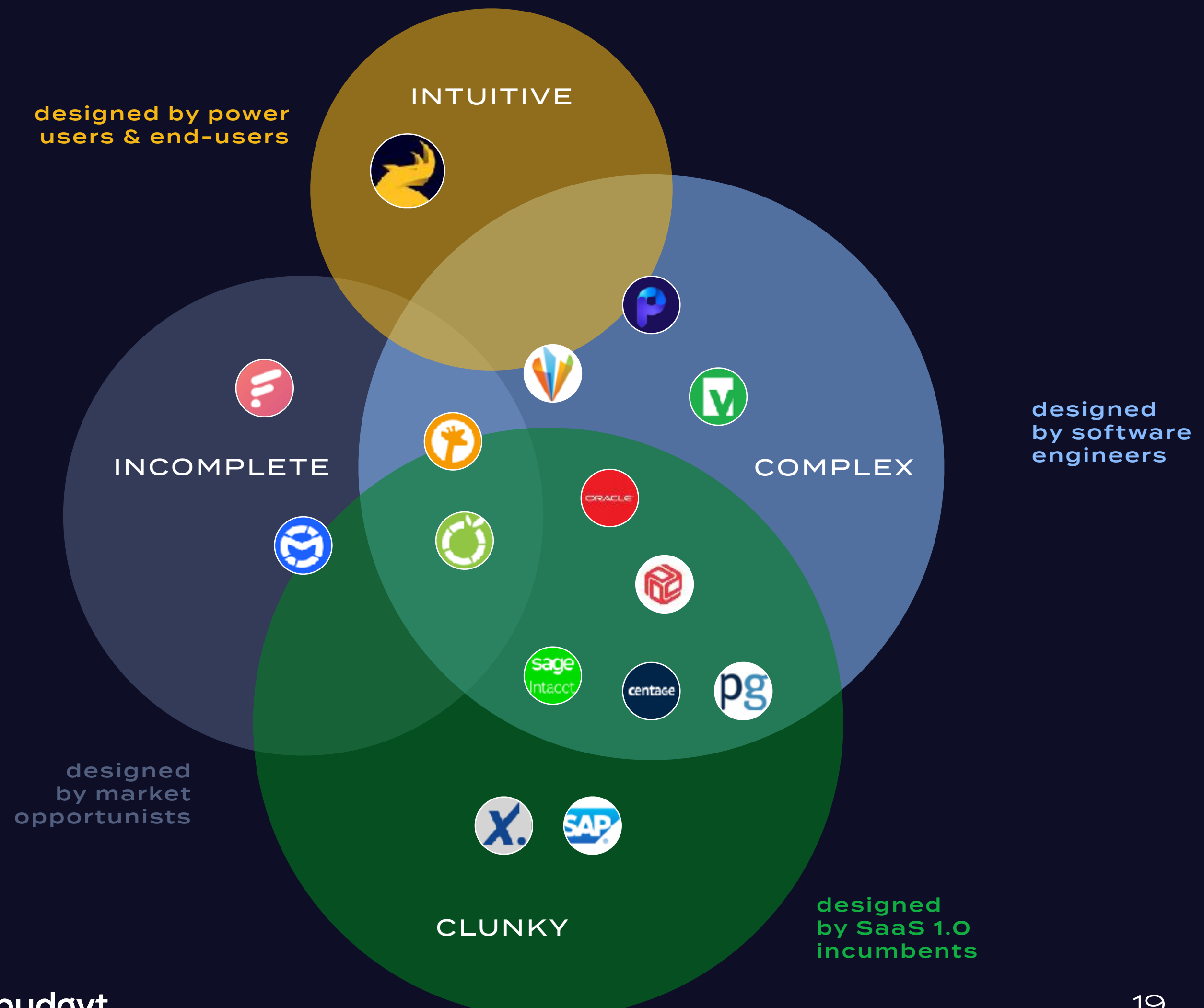
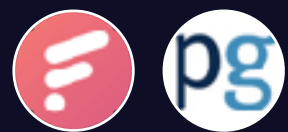


- ▶ The budget solutions in this tier are either Excel based with Add-on plugins or are designed for single department companies.

- ▶ Used by CPAs and part-time CFOs, they often have a steep learning curve, and are not particularly user-friendly to non-financial people.

- ▶ There is a subset in here that are for start-ups. These programs include PlanGuru, Futurli, Martus Solutions, Limelight, Live Plan and DryRun.

Typically \$750 - \$2,500 / year and upwards,



An overview of key features available across the marketplace

HOW WE STACK UP

	 CENTAGE	 PLANFUL	 ADAPTIVE INSIGHTS	 VENA SOLUTIONS	 BUDGYT	 JIRAV	 PLANGURU	 MARTUS SOLUTIONS	 LIMELIGHT	 LIVEPLAN	 JEDOX
MULTI-DEPT BUDGETING	✓	✓	✓	✓	✓	✓	✗	✓	✗	✗	✓
GL TRANSACTION DETAILS NOT JUST TRIAL BALANCES	✗	✗	✓	✓	✓	✗	✗	✗	✗	✗	✗
USER PERMISSIONS	✓	✓	✓	✓	✓	✓	✗	✓	✗	✗	✓
BALANCE SHEET/ CASH FLOW	✓	✓	✓	✓	✓	✓	✓	✗	✓	✓	✗
REPLACES EXCEL	✓	✓	✓	✗	✓	✓	✓	✗	✗	✗	✗
B.I. / VISUALIZATIONS	✗	✗	✗	✗	✓	✓	✗	✓	✓	✓	✓
DIMENSIONS	✗	✓	✓	✗	✓	✓	✗	✓	✗	✗	✗
PAYROLL MODULE (ACCRUALS)	✓	✗	✓	✗	✓	✗	✗	✗	✗	✗	✗
FORMULAS	CUSTOM SYNTAX	✗	CUSTOM SYNTAX	EXCEL SYNTAX	NO-CODE	LITE (UNSTACKABLE)	CUSTOM SYNTAX	✗	✗	✗	✗

don't take our word for it. **take theirs.**

EASE OF USE



I was really surprised at **how quick the user adoption was**. I work with four VPs with very different personalities and they all took to this like a duck out of water. A tool like this is quite affordable and quite helpful—and **basically pays for itself in the first year.**

JASON KEMPT
DIRECTOR OF FINANCE
UNITED WAY EAST ONTARIO



Excellent software—**easy to implement/use**. I have discarded all my excel reports for this web-based reporting and budgeting option. **Amazing difference**

KOBINA BUCKMAN
GROUP FINANCE MGR
OMA GROUP



Never use excel for budgeting again. Budgyt took all of those troublesome spreadsheets for each department and cost center and **condensed it into an easy way to input, track and view the information**. Would recommend this tool to anyone who wants to **save time, money and frustration** during the budgeting process.

GREGORY DANIELS
CORPORATE CONTROLLER
DOHMEN



The benefit with Budgyt is **getting rid of the need to use Excel** as the primary location to house all the budget data. **Sharing permissions are excellent**, so now all managers can access their budgets, submit changes, and get approvals all within this software.

SANDEEP KUMAR
CFO
IT GLUE



The **software is easy to customize** to fit your specific needs. It's easy for me to upload & download our data, and **our Managers are loving it** compared to what we used to use.

JAMES HAMM
CHIEF FINANCIAL OFFICER
CENTURY 21 JUDGE FITE

ONBOARDING

vs. EXCEL



We've eliminated the distribution of monthly reports and budget information by e-mail or spreadsheet and simply have our recipients login to Budgyt. **We love that there are no limits to number of users.**

MARK DONOVAN
CONTROLLER & IT MANAGER
SOVEREIGN GRACE CHURCH



I am a big fan of Budgyt. It **really was a game changer for our growing business**. Incredibly flexible, and the reporting tools are great. It also **allows you to be incredibly granular**, which is incredibly important to me.

JAY GODFREY
OWNER
JAY GODFREY



Integration with Quickbooks is easy and accurate! I subscribed to the software as a solution for budgeting compensation costs and **ended up with a total budgeting and managing budgets solution**

JENNIFER SCROGGINS
DIR. OF OPERATIONS
RESOURCE CENTRAL



You never want to give all employees access to QuickBooks Online, so this is **the perfect tool** to give them the data they need, without them being able to access everything. **It's taken a ton of inquiries off my lap."**

KATHERINE MACHEL
DIRECTOR OF FINANCE
TECHNOLOGY ACCESS FOUNDATION



We rely on a flexible approach to managing our finances, so it is critical to have data organized and presented the way we need it. **Budgyt is highly customizable and can fit most, if not any, accounts structure.**

PAUL RICE
FINANCIAL DIRECTOR
REVIVE CHURCH

COLLABORATION

GRANULARITY

INTEGRATIONS

DIMENSIONS

WE'LL GIVE ANYONE A RUN FOR THEIR MONEY.

To get a sense of how our pricing stacks up against the competition, we've prepared this pricing example to illustrate the potential costs*

THINK THEY CAN PERFORM AT A LOWER COST?
We'll **match any price** that delivers exactly what Budgyt can. **If you can find it.**



KEY ASSUMPTIONS

a non-profit business with 10 users and 30 Cost Centers (reporting units) + Balance Sheet & Visualizations add-on

	 CENTAGE	 PLANFUL	 ADAPTIVE INSIGHTS	 VENA SOLUTIONS	 JIRAV	 BUDGYT
COST						
SETUP	8.5K	N/A	25K+ (20K - 30K)	15K (10K - 20K)	6K (5K - 7K)	5K (3K - 7K)
3RD PARTY SETUP REQUIRED	N/A	20K	N/A	13K (10.5K - 15.5K)	N/A	N/A
EXTRA USERS	25K	unknown	75K (65K - 85K)	unknown	13K (3K - 8K)	UNLIMITED
BASE	N/A	25K (20K - 30K)	20K (15K - 25K)	25K (20K - 30K)	10.5K	10K
ONE-TIME SETUP	8.5K	20K	25K (20K - 30K)	25K (15K - 35K)	6K (5K - 7K)	5K (3K - 7K)
RECURRING ANNUAL	25K	25K (20K - 30K)	95K (80K - 110K)	25K (20K - 30K)	23K (13.5K - 18.5K)	10K

* These costs are estimates based on information publicly obtained.

we have
unstoppable
vision...and the
next five years are
looking good

EVOLVE TO WHAT
OUR CLIENTS
NEED



2026

LARGER ERP
INTEGRATIONS



2025

ARTIFICIAL INTELLIGENCE & MACHINE
LEARNING POWERED BENCHMARKING



2024

WORKFLOW AUTOMATIONS
AND ONGOING API'S



2023

BALANCE SHEET /
CASH FLOW &
VISUALIZATIONS



2022

5 YEAR road map

common 1st call questions

PAYROLL

- Can you budget payroll for individuals?
 - **Yes**, individuals and groups
- Can you budget payroll taxes?
 - **Yes**, we use limits and rates to give an accurate timing of payroll tax payments
- Does this work on Fiscal years
 - **Yes**, whatever your fiscal year, we begin the tax calculation in January.

HIERARCHY

- How many layers of hierarchy do you have?
 - 3 structural layers – Entity, Division, and Department (the names may be changed)
 - Additional virtual levels of hierarchy may be added using naming conventions or Dimensions feature
 - Unlimited Dimensions available

VERSIONS

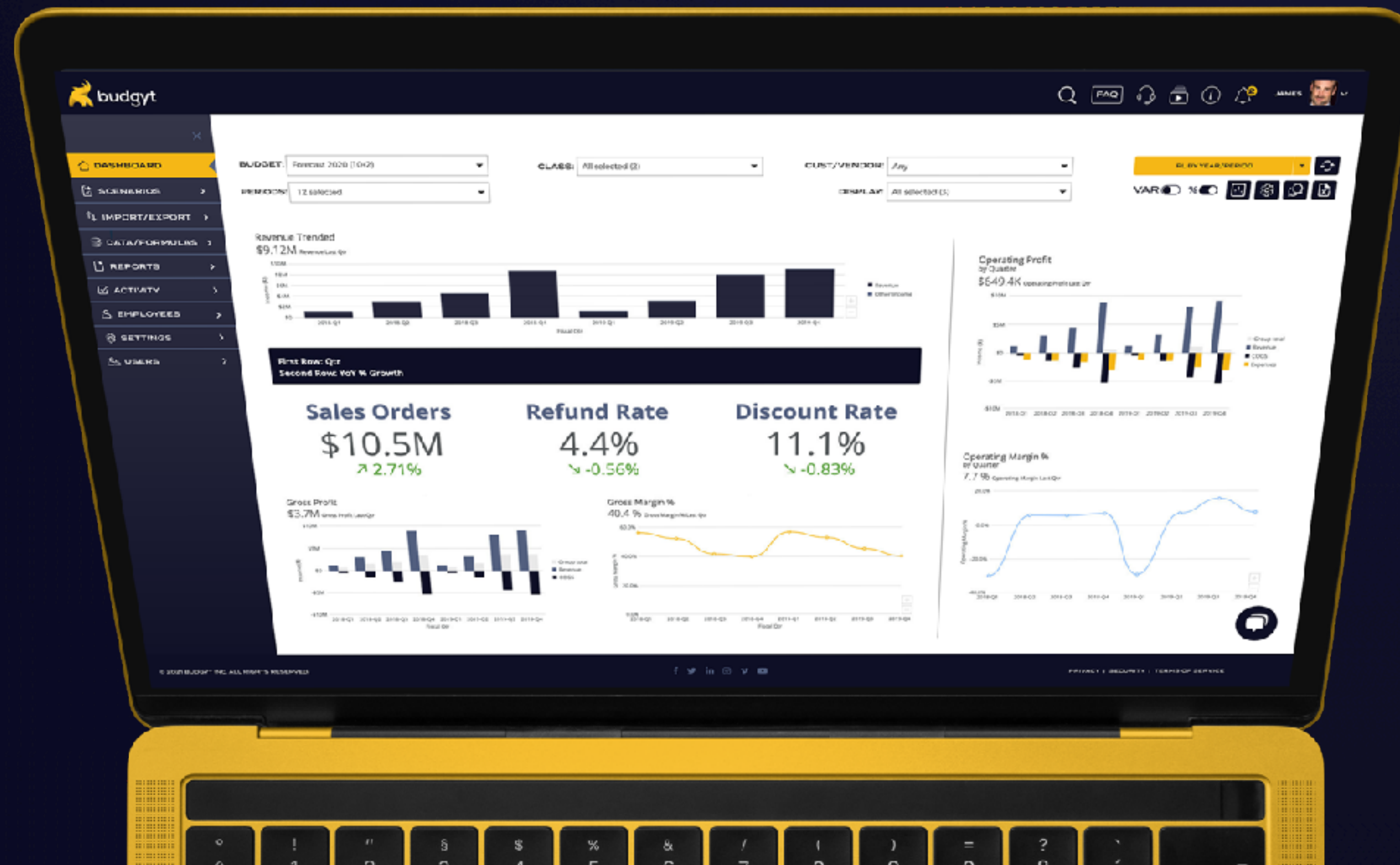
- Can I build What/If scenarios
 - **Yes**, you can clone a previous budget in seconds and make your changes in the new version
- How many versions can I build?
 - **Unlimited**

DATA DETAIL

- Can I get to my detailed data quickly?
 - **Yes**, all data on our Dashboards are links that allow instant drilldown to the details
 - And we can import ALL of your GL transactions, so you get a full set of historic data as well as a very detailed budget

NOT SURE WE CAN HANDLE YOUR BUDGETING?
explore an industry
sandbox demo

Serving over 72 industries (and counting), Budgyt is flexible enough to fit the needs every unique category. Listed here are the industries we currently have sandbox data available for use during free trials but certainly are not all those we serve. General data is available for all others.



RETAIL



EDUCATION



HOSPITALS



TECH



LABS



REAL ESTATE



INSURANCE



FAITH BASED

EXPLORE PLATFORM



thank you



info@budgyt.com



917-475-2615

simplifying **what's next** in FP&A