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hudgyt simplifying what's next in budgeting

GENERAL OVERVIEW DECEMBER 2022

simplifying **what's next** in budgeting







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



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.

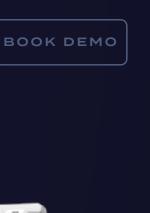
With powerful built-in tools for seamless budget collaboration, transaction-level data analysis, and detailed balance sheet & cash flow forecasting.

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











FINANCE DIRECTORS

CHALLENGES:

GOALS:

FREE TRIAL

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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

who's it for?





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

BOOK DEMO

Trust the data presented to you

FREE TRIAL



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

FREE TRIAL

Kbudgyt

simplifying what's next in FP&A



BOOK DEMO

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we serve a wide range of clients across multiple verticals









evelyn & walter HAAS JR. fund



























BUDGYT OVERVIEW CLIENT SNAPSHOT

FREE TRIAL















ASPEN

UNIVERSITY



john varvatos



















simplifying what's next in budgeting



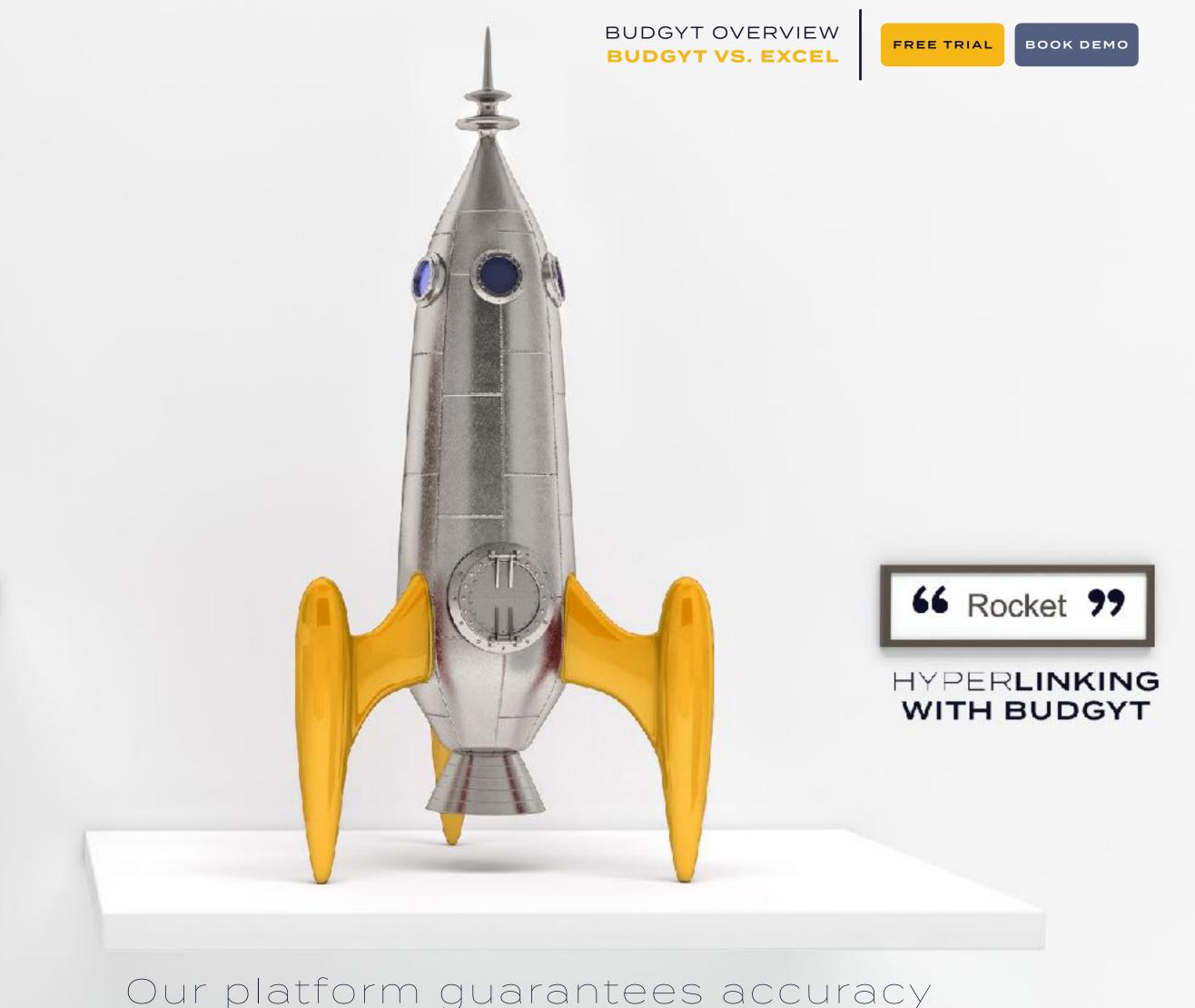
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Budgeting in Excel is the antiquated way of doing financial modeling and planning. Why put up with mediocrity and expose yourself to risks?







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

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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



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> > SOURCE

1 - https://www.solvexia.com/blog/almost-1-in-3-ceos-dont-think-their-cfo-is-up-to-the-challenge

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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

AVERAGE # OF UN-BREAKABLE FORMULAS

USING BUDGYT



USING EXCEL

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DOWNLOAD BUDGYT VS. EXCEL REPORT

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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.

TIME SAVINGS

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

BUDGYT OVERVIEW WHY CHOOSE BUDGYT?

BOOK DEMO

why choose budgyt?

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





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

BOOK DEMO



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 OVERVIEW **DATA INTEGRITY**



DENISE WEISS

DEVELOPMENT CORPORATION

UNBREAKABLE FORMULAS: never

for formula errors again knowing users can't break anything

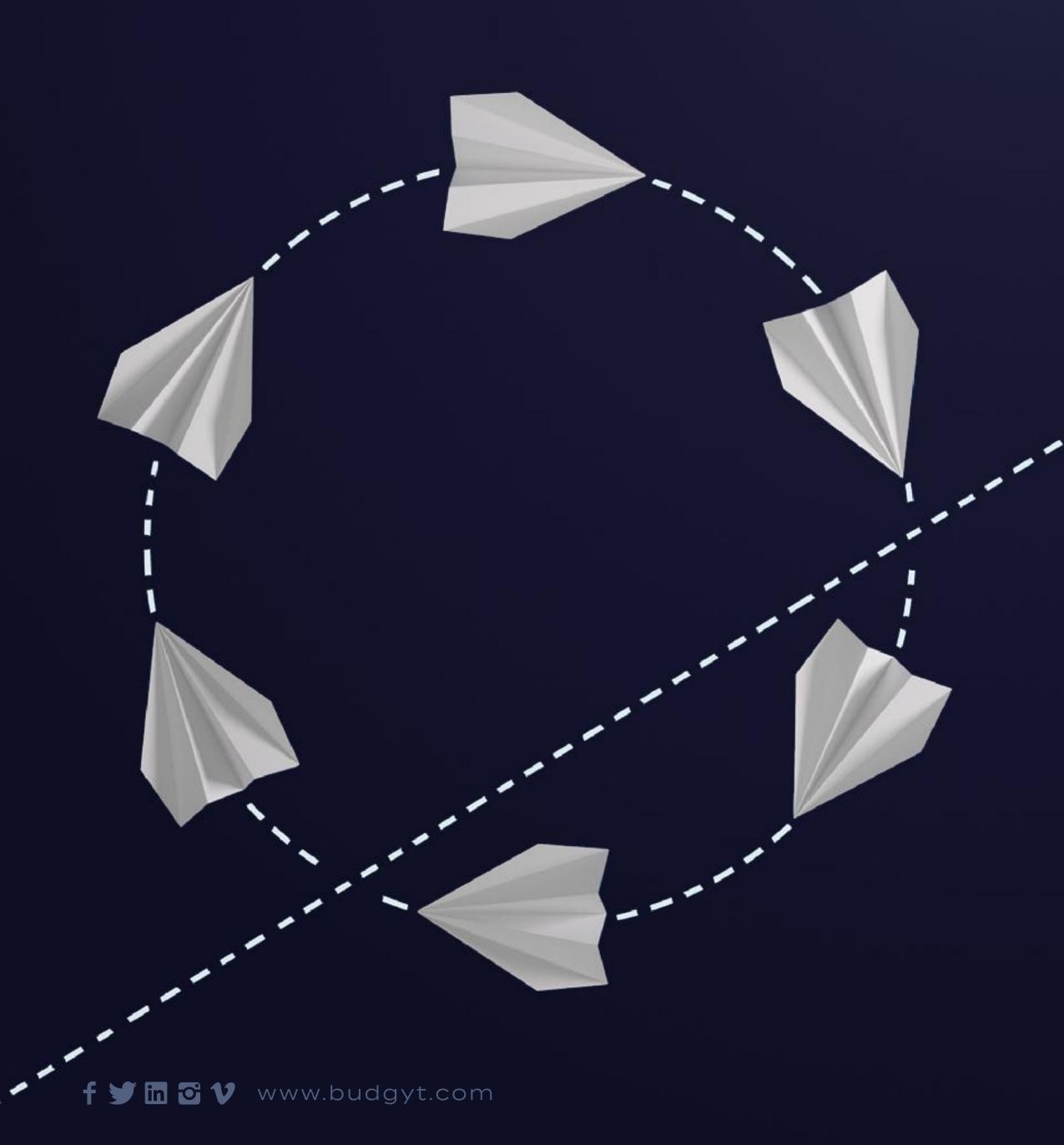
TRANSACTION-LEVEL DETAIL:

budgets from the bottom-up with 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





BUDGYT OVERVIEW THE WHY BEHIND OUR PRICING

FREE TRIAL

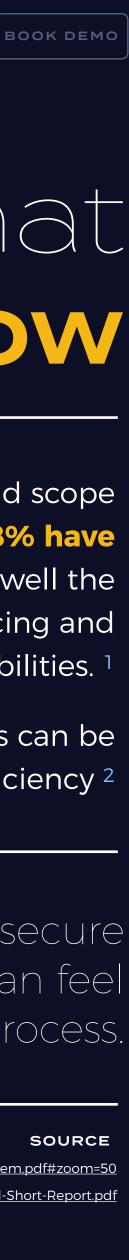
here's what we know

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 sufficiency²

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

1 - <u>https://www.accenture.com/_acnmedia/PDF-172/Accenture-Finance-Central-Nervous-System.pdf#zoom=50</u> 2 - https://www.accenture.com/ acnmedia/PDF-85/Accenture-CFO-Research-Global-Short-Report.pdf



here's what we believe

Departmental selfsufficiency

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.

A collaborative process in a single, cloudbased platform like Budgyt 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.



Real-time & diverse data

Better decisionmaking

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 Budgyt 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



simplifying **what's next** in FP&A | 14

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security you can trust policies & documentation



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 multifactor authentication
- 4. User permissions can be set by department, functions, versions, and read-only access



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





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.

CLOUD STORAGE PUTS YOU IN FULL CONTROL



BOOK DEMO

| 15

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

Getting to know you (and your budgets)

BUILD

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

IMPORT



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





Kick-off call & consultation (2 hours)



Our user retention is 6x higher than the industry average

2020 avg 54.58



avg 58.17

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



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









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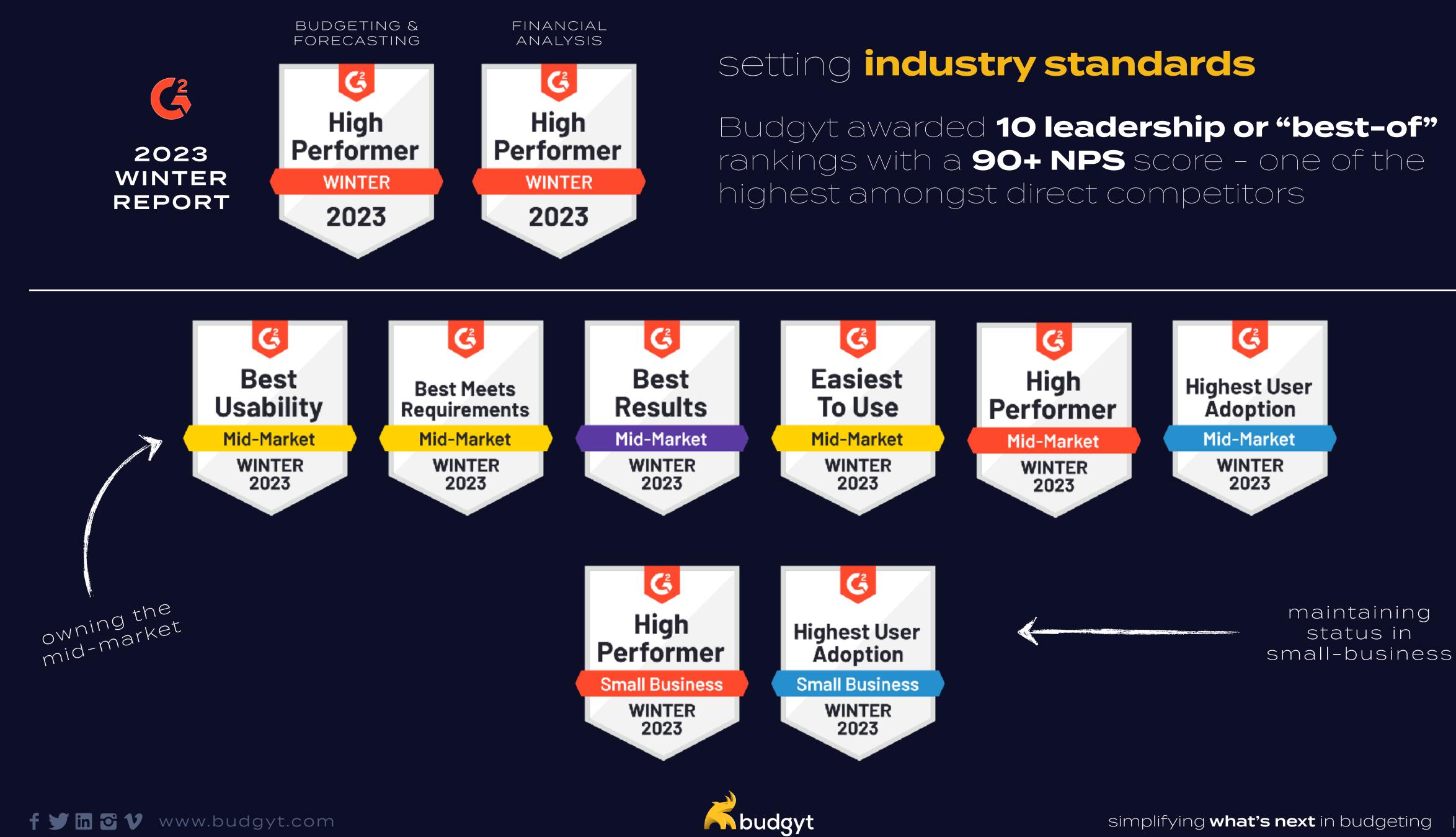
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simplifying what's next in FP&A | 17





simplifying **what's next** in budgeting

18

THE COMPETITIVE LANDSCAPE

There are 3 distinct levels of software tiered by pricing levels



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

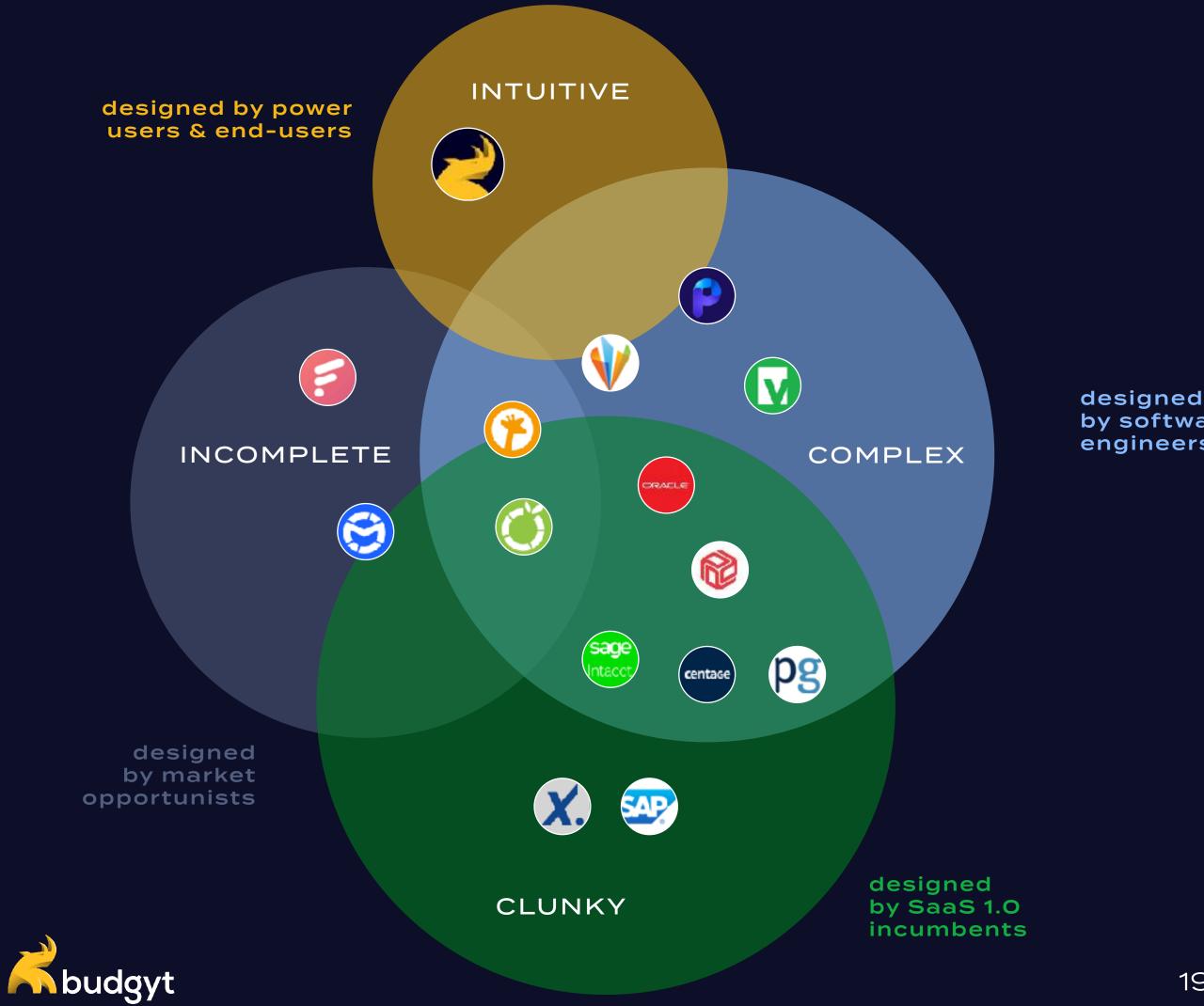
TIER 3 – AFFORDABLE (\$750) BUT TOO SIMPLE

- ► 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,



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





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 LIVEPLAN	JEDOX
MULTI-DEPT BUDGETING		\checkmark		✓	~	~	×	\checkmark	×	×	
GL TRANSACTION DETAILS NOT JUST TRIAL BALANCES	×	×		✓	✓	×	×	×	×	×	X
USER PERMISSIONS		✓		✓	✓	✓	×	✓	X	×	~
BALANCE SHEET/ CASH FLOW		\checkmark			✓	~	✓	×	✓	~	×
REPLACES EXCEL		~		×	~	✓		×	×	×	X
B.I. / VISUALIZATIONS	×	×	×	×	✓	✓	×	\checkmark	\checkmark	\checkmark	~
DIMENSIONS	×	\checkmark		×	✓	✓	×	\checkmark	×	×	×
PAYROLL MODULE (ACCRUALS)		×		×	✓	×	×	×	×	×	×
FORMULAS	CUSTOM SYNTAX	×	CUSTOM SYNTAX	EXCEL SYNTAX	NO- CODE	LITE (unstackable)	CUSTOM SYNTAX	×	×	×	×



BUDGYT OVERVIEW US VS. THEM

FREE TRIAL

	\square	
/	\Box	





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

ONBOARDING -



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



We've eliminated the distribution of monthly reports and budget information by e-mail or spreadsheet and simply have our recipients login to Budavt. 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

GRANULARITY

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**



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BUDGYT OVERVIEW **TESTIMONIALS**

FREE TRIAL

EASE OF USE -



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**

VS. EXCEL



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."



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**

hbudgyt

- INTEGRATIONS -

KATHERINE MACHEL DIRECTOR OF FINANCE TECHNOLOGY ACCESS FOUNDATION

DIMENSIONS

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



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

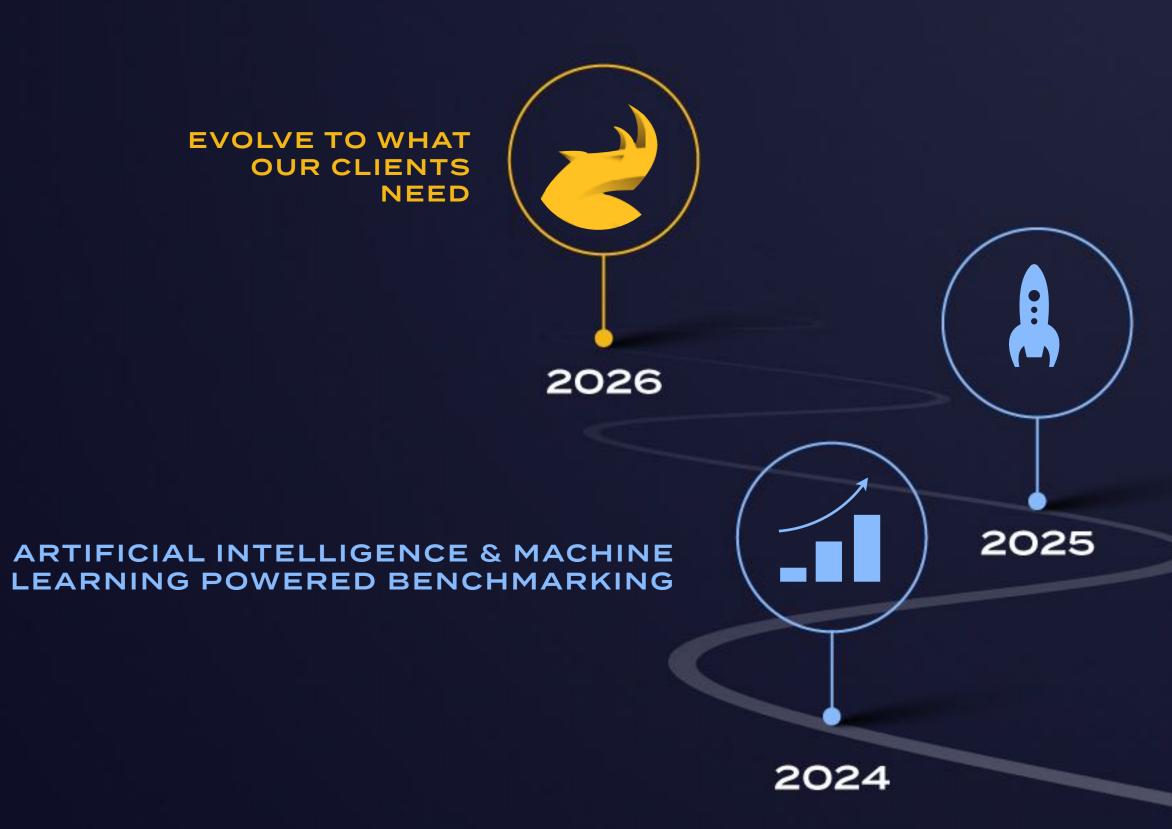
a non-profit business with 10 users and 30 Cost Centers (reporting units) + Balance Sheet & Visualizations add-on

R	(*)				centage	
BUDGY	JIRAV	VENA SOLUTIONS	ADAPTIVE INSIGHTS	PLANFUL	CENTAGE	COST
5К (3К - 7К)	6К (5к - 7к)	75К (10к - 20к)	25К+ (20к - 30к)	N/A	8.5K	SETUP
N/A		73К (10.5к - 15.5к)		20K		RD PARTY REQUIRED
UNLIMIT	13К (зк - 8к)	unknown	75К (65к - 85к)	unknown	25K	RA USERS
10К	10.5K	25К (20к - 30к)	20К (15к - 25к)	25К (20к - 30к)		BASE
5K (3K - 7K)	<mark>6К</mark> (5к - 7к)	<mark>25К</mark> (15к - 35к)	25K (20K - 30K)	20K	8.5K	ME SETUP
10К	23K (13.5K - 18.5K)	25K (20K - 30K)	<mark>95К</mark> (80к - 110к)	25K (20K - 30K)	25K	GANNUAL

* These costs are estimates based on information publicly obtained.













BUDGYT OVERVIEW FUTURE ROAD MAP

LARGER ERP INTEGRATIONS

2023

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

WORKFLOW AUTOMATIONS AND ONGOING API'S



BALANCE SHEET / CASH FLOW & VISUALIZATIONS





23

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



BUDGYT OVERVIEW FAQ'S

budgyt

simplifying what's next in FP&A | 24



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.

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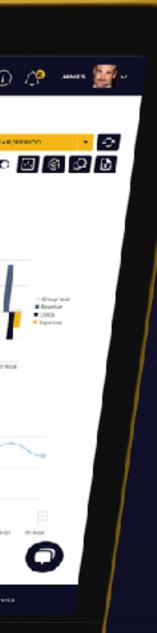
BUDGYT OVERVIEW SANDBOX DEMOS

FREE TRIAL











RETAIL



EDUCATION



0

TECH

HOSPITALS

LABS







EXPLORE PLATFORM



25

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info@budgyt.com



simplifying what's next in FP&A

