

# CFO Solution's EPM Health Check

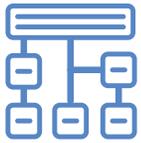
*Let CFO Solutions help you achieve maximum ROI  
from your EPM application*



Health Check

## A Roadmap For Success

Our Health Check provides an assessment of your implementation and clear guidance on integrating and customizing advanced features to provide unparalleled insight into your business operations.



Close &  
Consolidation



Financial  
Reporting



Financial  
Planning



Operational  
Planning



### **An EPM Health Check gives you an action plan:**

The goal of our Health Check is to provide you with a plan on how to gain more value from your application.

- We assess the suitability and stability of your application to meet your organizational needs.
- We measure the impact, complexity and lead time to make changes.
- You receive a detailed report that provides you with a clear plan of action.

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**CFO Solutions**

# What We Assess

A Health Check examines your processes and application, assessing the areas of concern indicated below:

	APPLICATION	END USER EXPERIENCE	ADMINISTRATION
<b>Purpose</b>	Review application to determine if it is optimized for its intended use	Determine the quality of the end user experience	Review administration procedures to determine risks and inefficiencies
<b>Topics</b>	<ul style="list-style-type: none"> <li>• Dimensionality</li> <li>• Budget Entity</li> <li>• Level of Detail</li> <li>• Workflow</li> <li>• Calculation and Aggregation</li> <li>• Business Processes</li> <li>• Data Load Rules</li> <li>• Data Quality</li> <li>• Data Management</li> </ul>	<ul style="list-style-type: none"> <li>• Goals and Expectations</li> <li>• Ease of use</li> <li>• Application Acceptance</li> <li>• Reporting</li> <li>• Ad Hoc Analysis</li> <li>• Input Templates</li> <li>• Leveraging Functionality</li> <li>• Training Opportunities</li> <li>• Planning Cycle</li> </ul>	<ul style="list-style-type: none"> <li>• Template Management</li> <li>• Scenario Management</li> <li>• Structure Management</li> <li>• Report Management</li> <li>• Security and Audit</li> <li>• Performance</li> <li>• Scheduling</li> <li>• Documentation</li> <li>• User Support</li> </ul>



## Real Results

The Health Check final report captures detailed findings so you can take action and see real results. The report includes the following information on all issues identified.

- **Observation:** What we found
- **Recommendation:** Recommended approach
- **Benefits and Risks:** Benefits of making the change and risks of no change
- **Impact Rating:** Impact of the change on the organization
- **Complexity Rating:** Effort to implement and degree of change
- **Resolution Window:** How soon we recommend implementing the change

This report prioritizes key items, providing you with a resource to further mature the application or your overall application management strategy.



Contact us today to schedule your EPM Health Check.

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