



FINANCIAL SERVICES

# Infor d/EPM for Financial Services

## Optimize decision-making processes

With the right EPM system, quality data sets can be united in one place, so organizations can budget, plan, and forecast with seamless ease and accuracy. Infor® Dynamic Enterprise Performance Management (d/EPM) for Financial Services delivers intelligent business and financial performance management capabilities that will help drive overall business performance more effectively. With Infor d/EPM for Financial Services, organizations can experience real-time insights with a centralized data repository to make more informed and perceptive decisions across your enterprise. The innovative software solution provides a holistic view of business performance, so present insights can offer more accurate and actionable future predictions, helping firms build a strong financial foundation.

## Take data to the next level with in-context business intelligence

Infor d/EPM for Financial Services is based on an in-memory analytical applications platform that provides timely consolidation of data and immediate user feedback on the impact of financial and business plans and forecasts, so you can plan and prepare in real time. The capabilities and benefits go far beyond easy access to data—you can also better manage performance, risk, and the impact of business decisions across your organization.

## Improve the user experience with modern tools

Infor d/EPM for Financial Services collects real-time data from source applications and translates it into business insights delivered through a fully integrated solution suite with a common user interface. A single version of the truth comes from a software suite pre-built to take advantage of mobile technology and a collaborative cloud architecture.

You can easily integrate your Infor and non-Infor enterprise systems, whether they're on premise, in the cloud, or both. This seamless integration, especially when your solutions are deployed in the cloud, reduces the strain on your IT departments by making it easier to securely manage your technology investments, stay up to date with upgrades, and move away from hardware-related expenses.

Best of all, you can eliminate the data silos that unconnected systems can create. Thanks to the seamless data integration tools in Infor d/EPM for Financial Services, you can drive better decision-making at every level of your organization—the C-suite, sales and marketing, finance, supply chain partners, and more.

## Expand your competitive edge

The increasingly competitive nature of financial services markets requires you to make insightful budgeting and planning decisions faster. A strong and innovative enterprise performance management (EPM) system can transform your finance department by providing your teams with the tools to track your strategic activities against your past performance, while also better ensuring financial accounting accuracy. When your CFO and finance departments have accurate and actionable sales and marketing data, your entire organization is empowered to make better business decisions.

Infor d/EPM for Financial Services gives you tools for:

- **Deep insight and visibility**—Transform information into actionable insights and make data your competitive advantage. Experience a real-time view of performance across your business to help you speed decision-making and unlock siloed data between your enterprise applications.
- **Intelligent financial performance management**—By combining planning, budgeting, and forecasting in a single system, you get better predictive modeling and an agile platform for your operational planning, workforce budgeting, and sales estimates. Incorporate your strategic plans and monitor against your actual performance, as well as consolidate your holdings for complete financial reporting.

- **Workforce planning**—Infor d/EPM for Financial Services can help you optimize your headcount to meet scheduling requirements, so that you can account for gaps between planned and actual coverage. That way, you'll always know how many people are needed based on information about the forecasted demand, as well as the length of time it takes to complete a task.
- **Time to value**—Leverage delivered solutions along with packaged connectors to Infor applications to simplify data integration and implementations and get a faster ROI on your ERP investment.

## Get industry-specific tools for specific needs

Created to better accommodate the needs of specific micro-verticals, including financial services, healthcare, hospitality, manufacturing, public sector, and more, Infor d/EPM for Financial Services delivers dashboards and information by industry and business process areas. The application provides visibility across all of your critical processes from financials and sales performance to production orders and quality—in a system that can be tailored to your needs.

## Unlock new opportunities

When you deliver an integrated suite of applications for planning and analysis, combine it with compliance tools geared to your industry, and then connect it all to your underlying systems, you can translate the insights you've gained from studying your past performance to build a better today and a more productive tomorrow.

- **Budgeting and planning**—Create deep plan hierarchies, compare plans to forecasts, and adjust plans on the fly. Task management, decision packages, workflow, and versioning capabilities bring a new level of discipline and flexibility to your budgeting processes.
- **Financial consolidations**—Consolidate multiple sets of books quickly and seamlessly from each of your legal entities, process elimination entries, and generate a single set of financial statements.
- **Workforce budgeting**—Detail headcount requirements, model salary adjustments, account for vacancies, and assess room for increasing or decreasing staff.
- **Workforce planning**—Maintain visibility into scheduling requirements to match headcount to demand, so the right people are assigned to a specific product, cost center, or customer.
- **Cost allocation**—Bring more discipline to cost management and identify cost objects regardless of what they are—projects, products, departments, or activities. Distribute costs through multi-step, multi-level allocations as part of the overall planning process.
- **Capital planning**—Assess your capital investments more accurately and determine which projects to fund with new capital planning capabilities.
- **Strategy management**—Map out strategic goals, tie them to tactical plans, monitor progress toward your goals, and take action.
- **Flexibility and extensibility**—Extend the core functionality of Infor d/EPM through sub plans. The solution is built on the Infor Business Intelligence (BI) platform, so you can add new tabs to your workbooks for detailed revenue models with different time granularity than in the core model.

## Prepare for future growth

To build a strong competitive advantage, empower users throughout your organization, and keep pace with changes in global markets—enterprise performance management software, like Infor d/EPM for Financial Services, can help.

### Infor d/EPM empowers you to:

- Make decisions in-context with your business plans.
- Drive better investment decisions across your business and give your users access to insights anywhere, anytime.
- Manage workforce planning and demand, while you plan and forecast using predictive analytics.
- Implement planning tools with pre-packaged content.
- Align your strategy and execution with centralized data.
- Collaborate on budgeting process and optimize resources.
- Proactively and automatically monitor your systems.

[Learn more >](#)



Infor builds business software for specific industries in the cloud. With 17,000 employees and over 68,000 customers in more than 170 countries, Infor software is designed for progress. To learn more, please visit [www.infor.com](http://www.infor.com).

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