# whitleypenn

CLIENT ACCOUNTING & ADVISORY SERVICES (CAAS): DATA ANALYTICS & TRANSFORMATION SOLUTIONS



## **ASSESSMENT & ADVISORY**

Make improvements to your existing processes with a detailed road map.

With deep functional and unmatched domain knowledge, we will find the right fit for your needs to develop capabilities more aligned with your present Business Intelligence and Information Systems.



### **FINANCIAL CLOSE**

#### The consolidation process does not have to be time consuming and laborious.

After our implementation, close management processes such as ownership, intercompany eliminations, journal entries, etc. become much simpler. Validate Currency Translation Adjustments (CTA) and balance sheet variances with ease, and produce management and external reports quickly – reducing cycle time.



#### PLANNING AND FORECASTING

Mitigate risk in your forecasting to design a strategic annual plan.

Introduce real-time transformation to your plan cycle and forecasting process. An integrated, cohesive and collaborative driver-based approach can help you understand dependencies and improve accuracy. We can build models for revenue and people planning, write complex allocation logic, and help your business owners immediately see the impact of their actions to topline or variable profit contribution.



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## REPORTING

Nimble financial reports that meet your complex and ever changing requirements.

We see reports as an end outcome of a comprehensive process. This procedure could be your yearly budget, forecast, legal consolidations or simply performance analytics. We have you covered by helping to automate and generate all management and external reports.



## **ANALYTICS**

Bridge the gap between technology and business processes by creating metrics for your business to move forward and help you make informed decisions.

Gain insights into your business and promote fact-based decision-making. From business variance analysis to profitability assessment, we have the right tools to support your organization in making sense of the vast amount of data.

#### WHY CHOOSE US?

- **》** We partner with on-premise and cloud applications (Host Analytics) providers
- **》** Top functional knowledge with unmatched domain experience
- **》** Collaborative approach, we bring passion to our work and engage our clients from day one
- **》** Industry agnostic - experience across many verticals

#### **ENTERPRISE PERFORMANCE MANAGEMENT (EPM) PARTNERS**





#### INTEGRATION PARTNERS

- **>>** SnapLogic
- **>>** Boomi
- **》** Flowgear
- **>>** Other iPaaS Solutions

#### **CLOSING & CONSOLIDATION** PARTNERS

**>>** Trintech