



PLANNING MAESTRO

Planning Maestro is a cloud-native platform that delivers a competitive advantage through the ability to easily budget, forecast financial performance, analyze results and share critical information across the business.



Modern FP&A for Finance & Insurance

- ▶ Manage and forecast revenue using drivers such as revenue per policyholder, number of policies, and customer retention
- ▶ Create scenarios and see the impact of varying premium rates, agent payouts and Bundle Policy Rates
- ▶ Monitor and report on key performance metrics such as policy sales growth, premium volumes and premium pricing
- ▶ Analyze agent recruiting and training expenses to better understand their impact on profitability
- ▶ Manage and report on billable hours, paid hours, employee utilization and income per employee
- ▶ Allocate personnel and related expenses across different branches, departments, premium types or service offerings
- ▶ Control accounts receivables by tracking payment schedules and cash flow impact
- ▶ Create integrated P&L, balance sheet, and cash flow statements and see the effects of sales on accounts receivable, deferred revenue and cash flow
- ▶ Provide greater visibility through dynamic reports and customizable dashboards, using multiple views and hierarchies for various GAAP and regulatory reporting requirements

LEADING FINANCE & INSURANCE CUSTOMERS INCLUDE:

- ▶ Brightstar Capital Partners
- ▶ Insurance Corporation of Barbados
- ▶ Kernow Capital
- ▶ New Mexico Mortgage Finance Authority
- ▶ Northeast Delta Dental
- ▶ Olympus Insurance Company