

Using Power BI to Rewire and Integrate Your Planning Processes

AFP FP&A Forum

Presented by Collectiv

Introduction

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Agenda

01

The Problem with Traditional Planning

02

Modern Integrated Planning Architecture

03

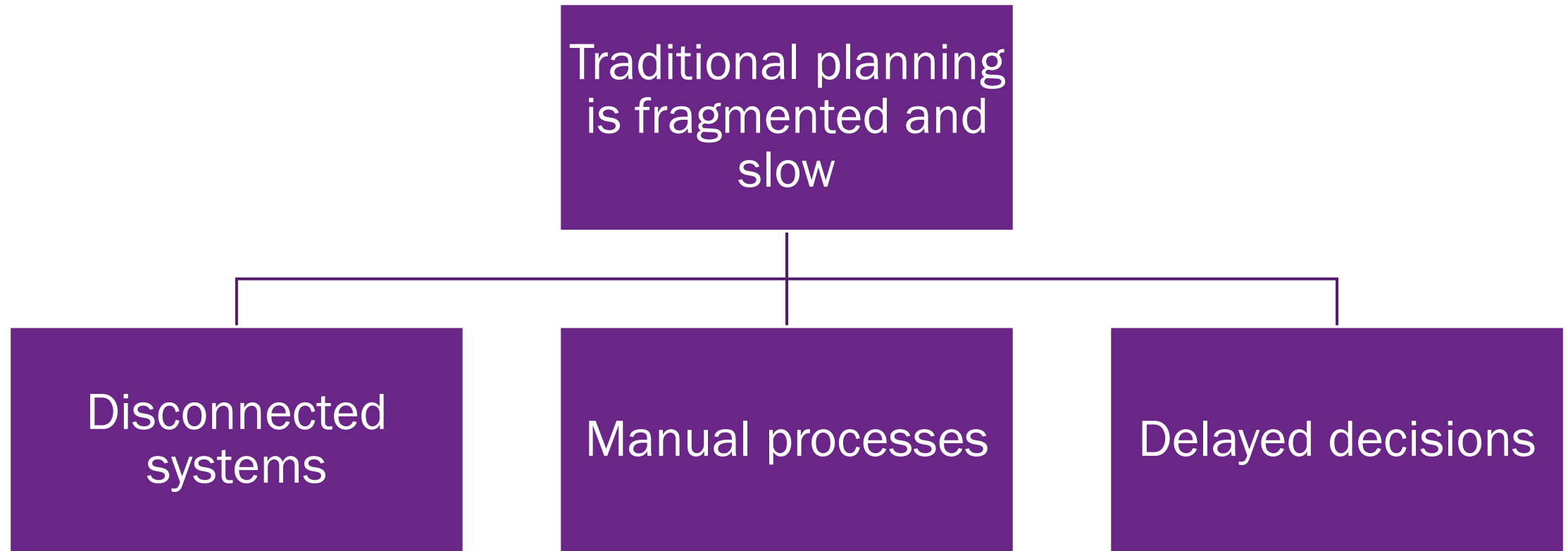
Live Demos: Reporting, Writeback, Scenario Switching

04

Key Takeaways + How to Get Started

The Problem

Traditional Planning Is Fragmented and Slow



Planning Data Lives Everywhere

Planning data lives everywhere, except together



Excel



Planning Tools

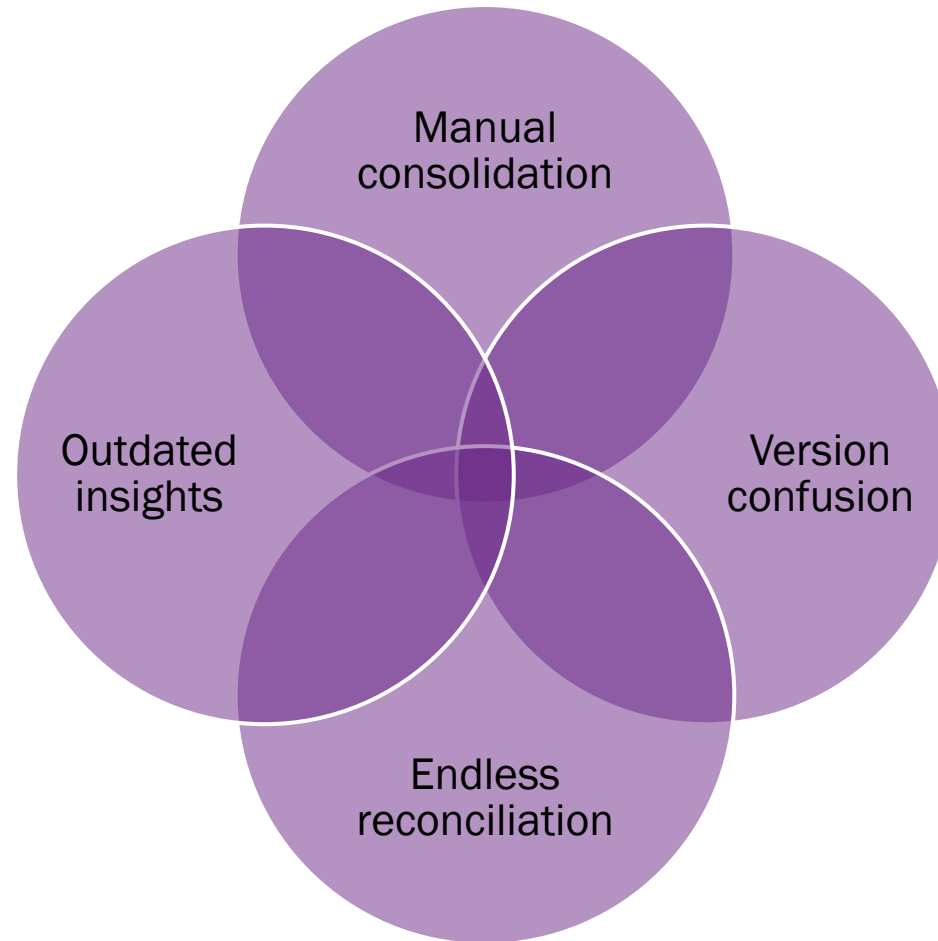


ERP Systems



Data Warehouses

Fragmentation Creates Risk and Delays

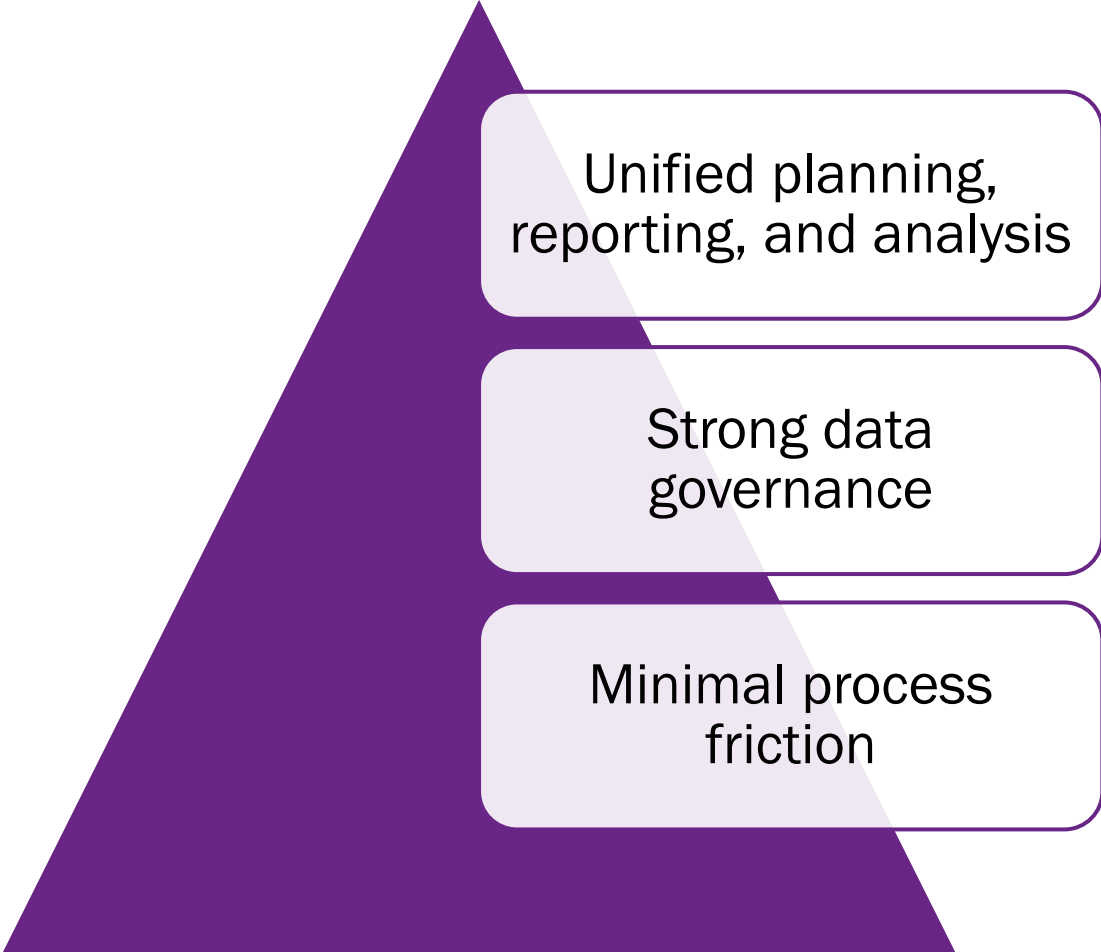


What Modern Finance Needs

Planning Is No Longer Annual, It's Continuous



Modern Finance Needs Speed and Structure



Unified planning,
reporting, and analysis

Strong data
governance

Minimal process
friction

The Opportunity + Power BI

What If Planning Lived in One Place?

Familiar Interface

Proven, trusted user experience

Live Data

Real-time connections, no data lag

Governed Models

Centralized, secure, validated data

Collaborative Workflows

Engage entire organization in planning

Power BI is No Longer Just BI

Comprehensive
Financial Platform

End-to-End
Workflows

Semantic
Models

Fabric
Integration

Writeback
& Planning
Extensions

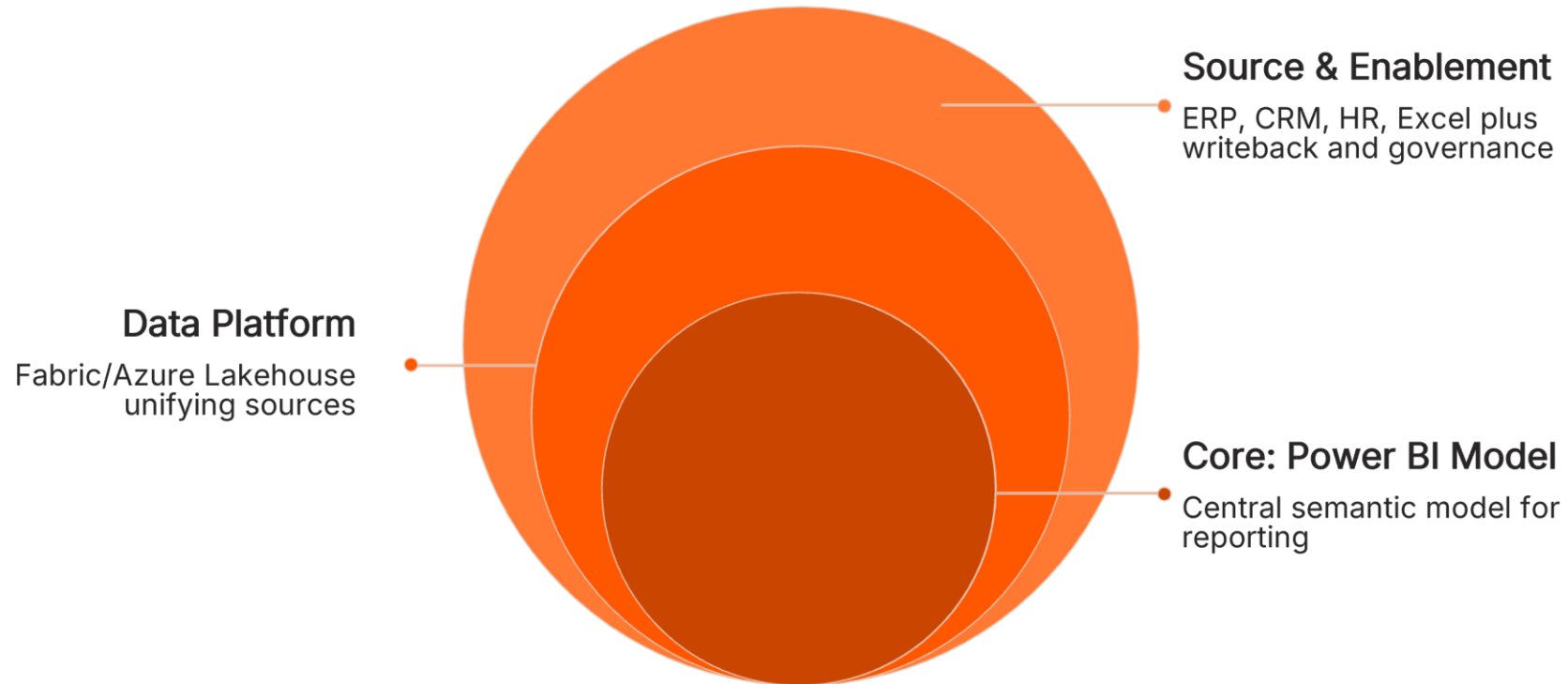
Embedded
Workflows

Live Demo #1: Reporting → Insight

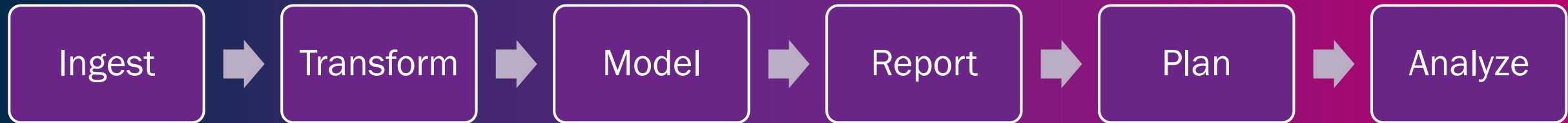
Financial Statements Report

Architecture

A Modern Planning Architecture Connects Everything



From Data to Decisions



Most Organizations Stop at Reporting

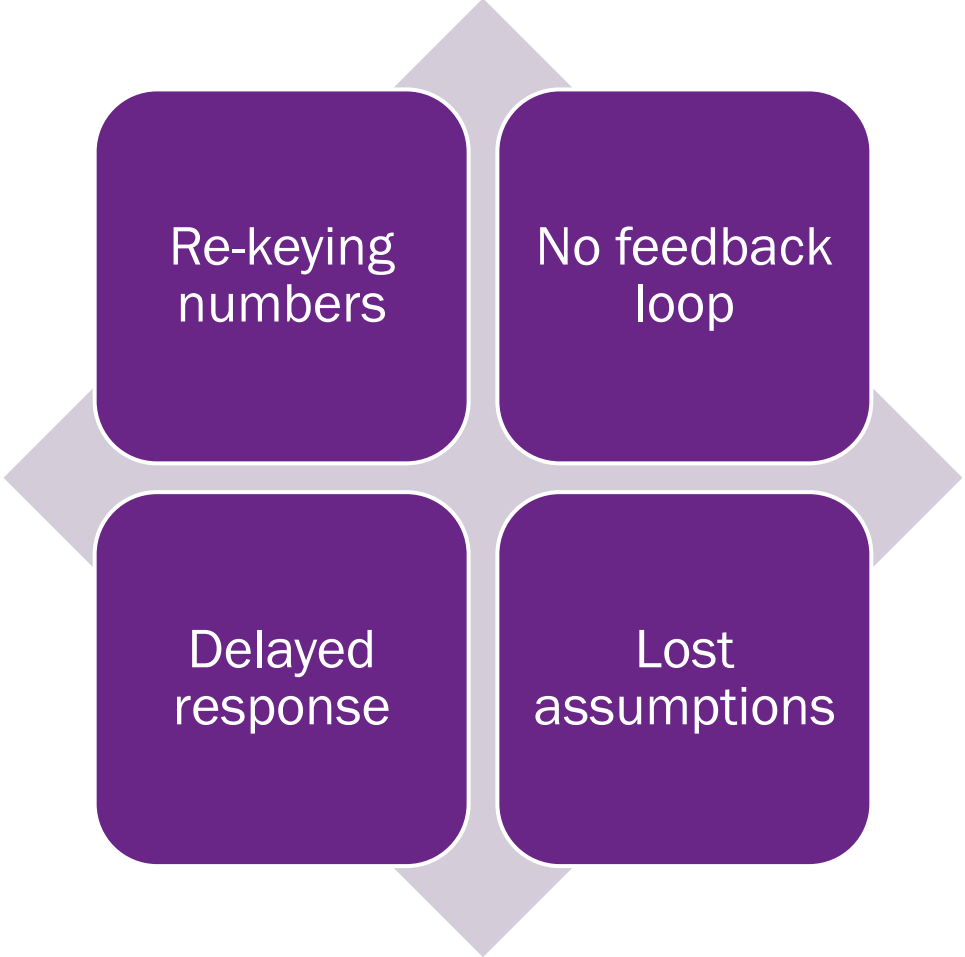
Reporting explains the past but doesn't shape the future

Action Happens Outside the Report

Insights in
Power BI

Actions in
Excel and
email

That Gap Slows Everything Down



Integrated Planning

Integrated Planning Closes the Loop

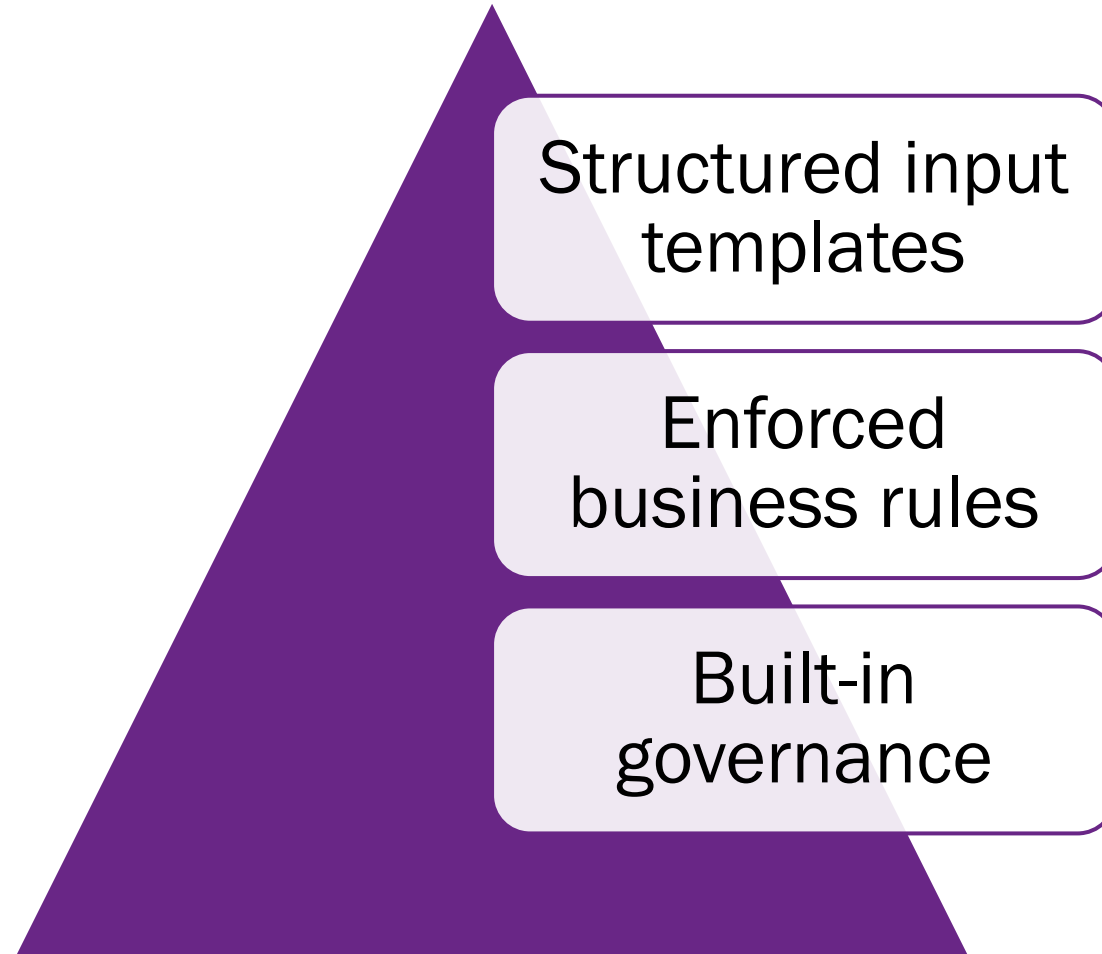
No
manual
entry

Accurate
and
auditable

Unified &
governed

Role-
based
access

Planning Inside Power BI



From Insight to Adjustment

Forecast
updates

Commentary
and approvals

Scenario
modeling

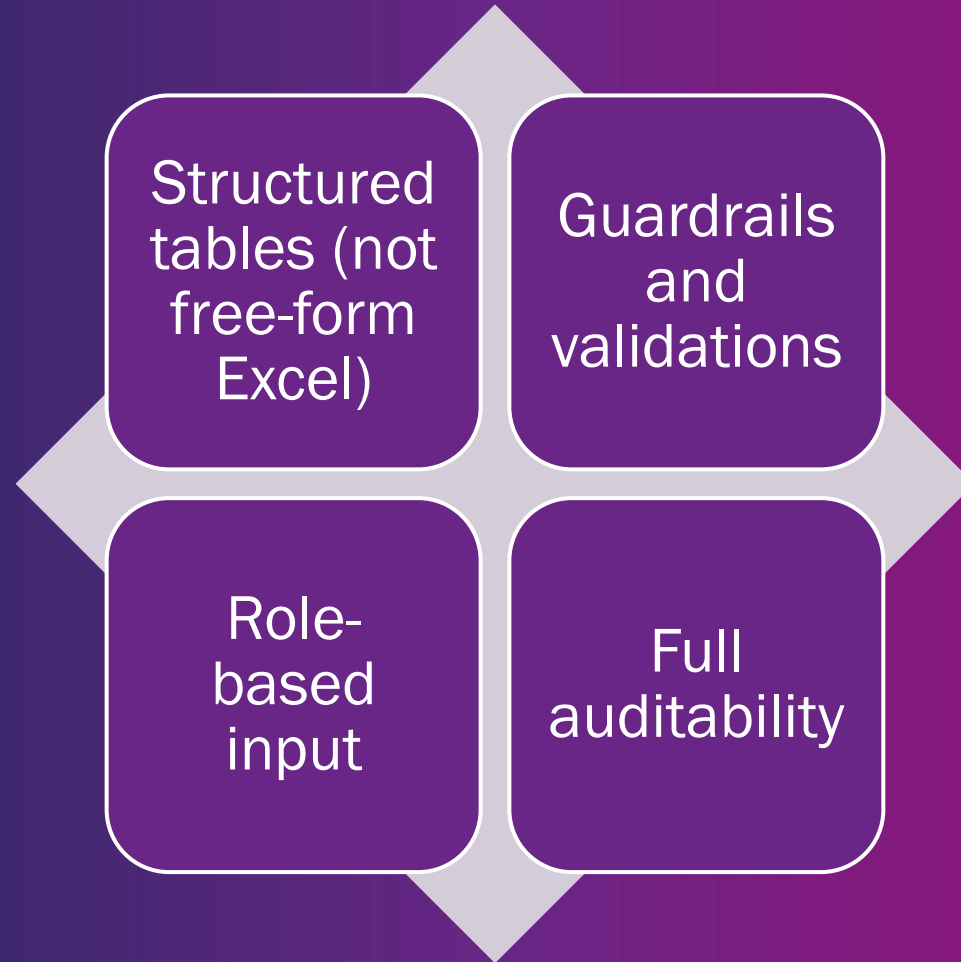
Live Demo #2: Governed Planning Writeback

Use Cases + Design

High-Impact Planning Use Cases

- Rolling forecasts
- Expense planning
- Revenue modeling
- Scenario analysis
- Headcount planning

Designing Effective Planning Templates



Collaboration + Controls

Finance-Led, Business-Owned Planning

Finance sets
structure and
governance

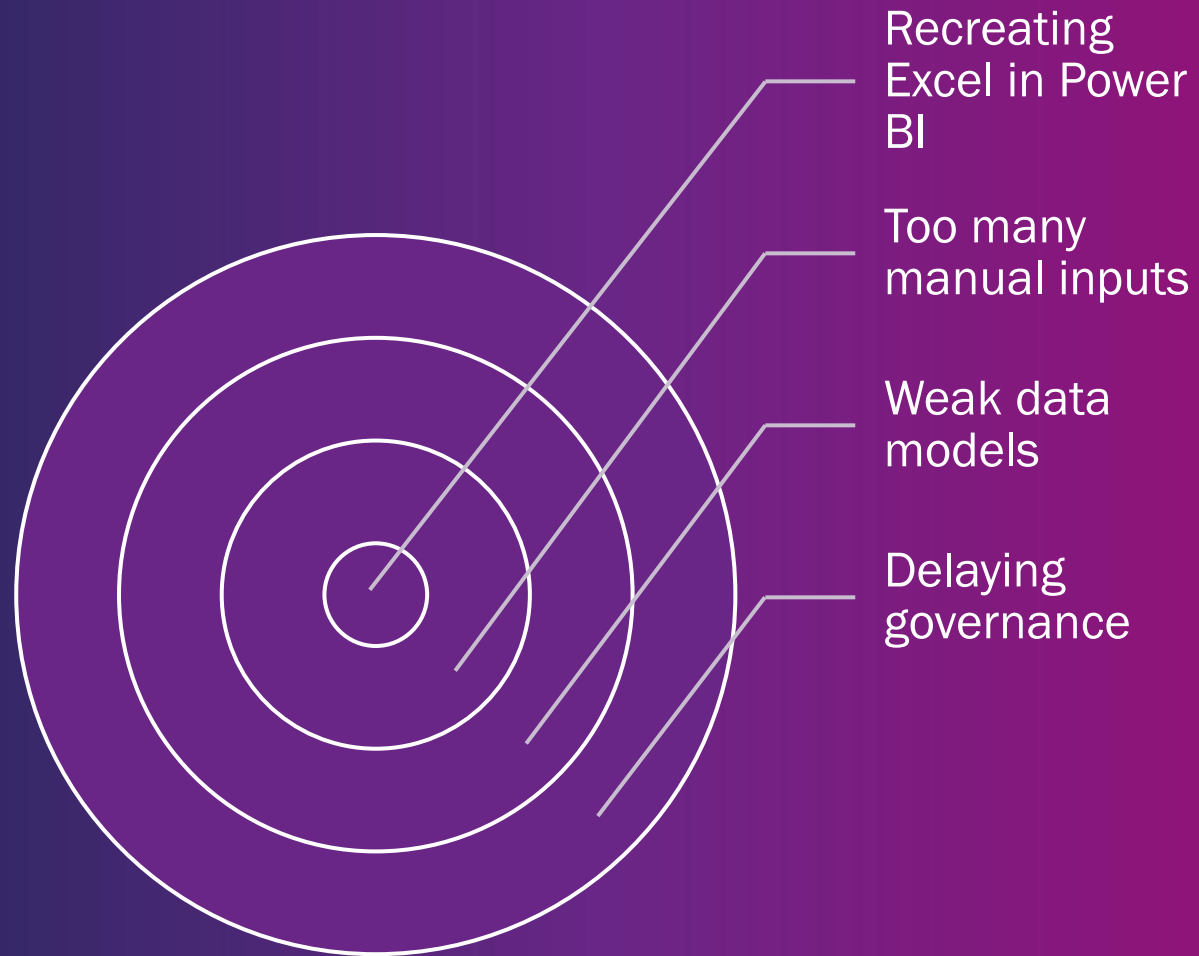
Business teams
provide inputs

Leadership gets
consolidated
insight

Controls Users Don't See But Trust

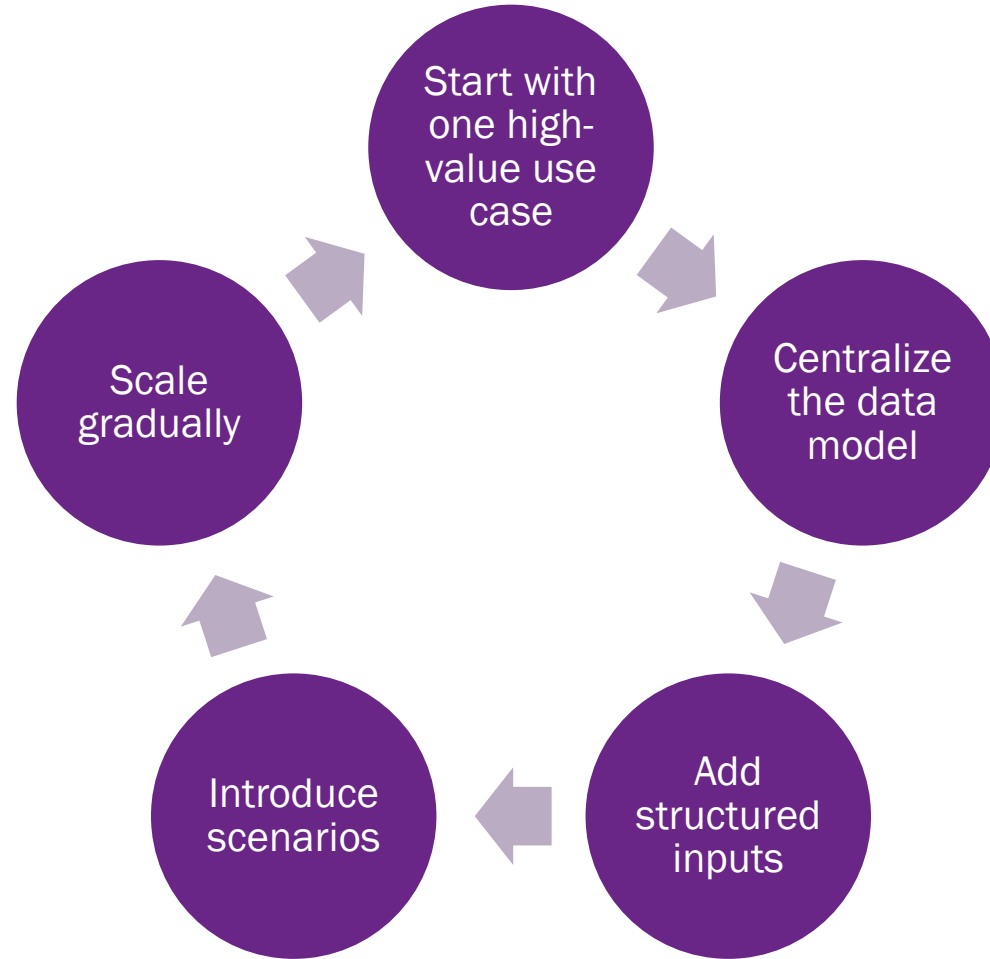


What to Avoid

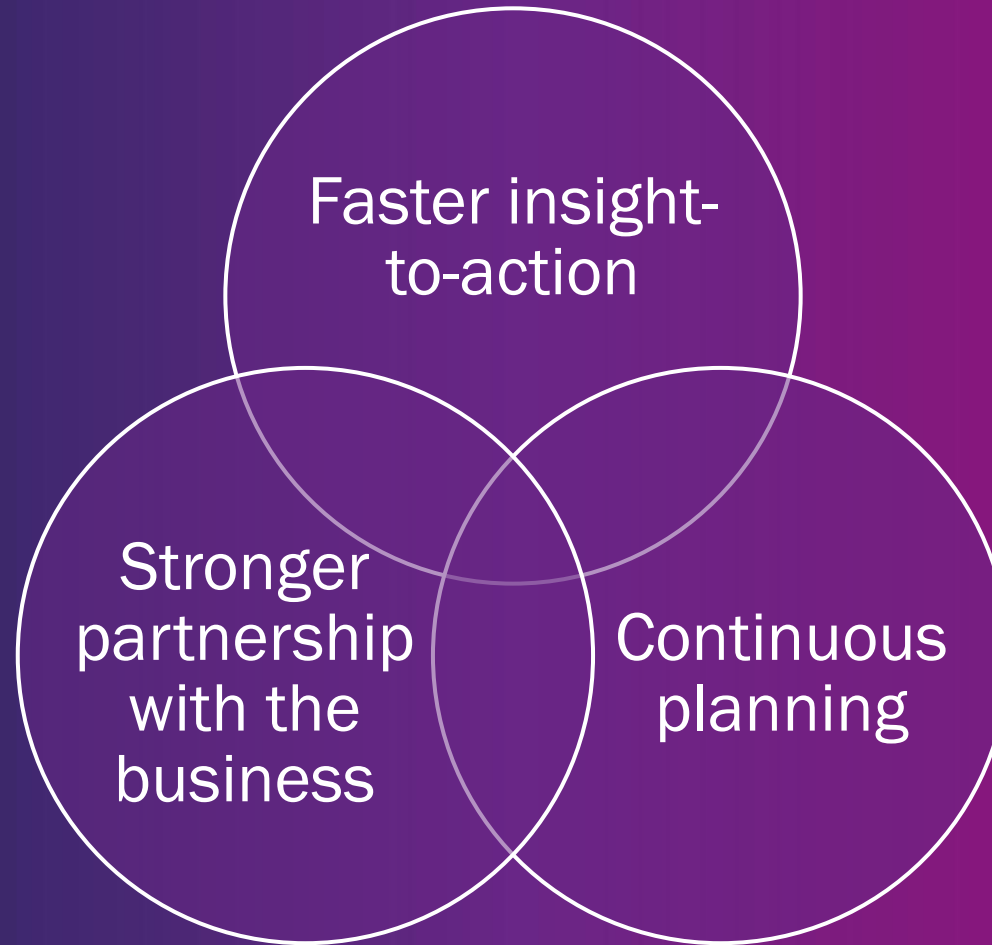


**Live Demo #3:
Scenario Switching &
Decision Support**

How to Get Started



Why This Matters for FP&A



Questions?



Next Steps

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Continue the conversation.

Scan to connect with Dennis on LinkedIn

