

Powerful Planning Solution in MS Power BI



# Planning, Analysis & Reporting in MS Power BI

With Microsoft's leading platform for data visualization, integrated planning is now possible. We'll show you how!

## New: Powerful Planning Directly in MS Power BI

The Power BI ecosystem is renowned for its intuitive interface, vast expandability, and flexibility. What's new: full-fledged planning capabilities within Power BI.

With the smartpm visuals, end users handle planning and reporting exclusively in Power BI and see all data changes instantly. They enable input of plan values at all planning levels. The underlying powerful OLAP technology guarantees top performance and scalability, even with very large datasets. For data entry, users can choose from various visuals such as tables, bar and line charts, diagrams, and even Gantt charts. In addition, functionality is enhanced with AI assistants and agents.

In this factsheet we'll show you:

- ✓ How integrated planning works directly in Power BI
- ✓ How smartpm visuals and model content simplify your planning
- ✓ What the new AI integration contributes to modern planning

These are the benefits you can expect from smartpm visuals:

- Work in a single, familiar, and simple interface with high user acceptance
- smartpm visuals enable reporting, analysis & full-fledged Power BI planning in real time
- Save time & increase efficiency: all subplans are predefined and quickly implemented
- Link strategic and operational planning with measures tracking and AI

Customer feedback:

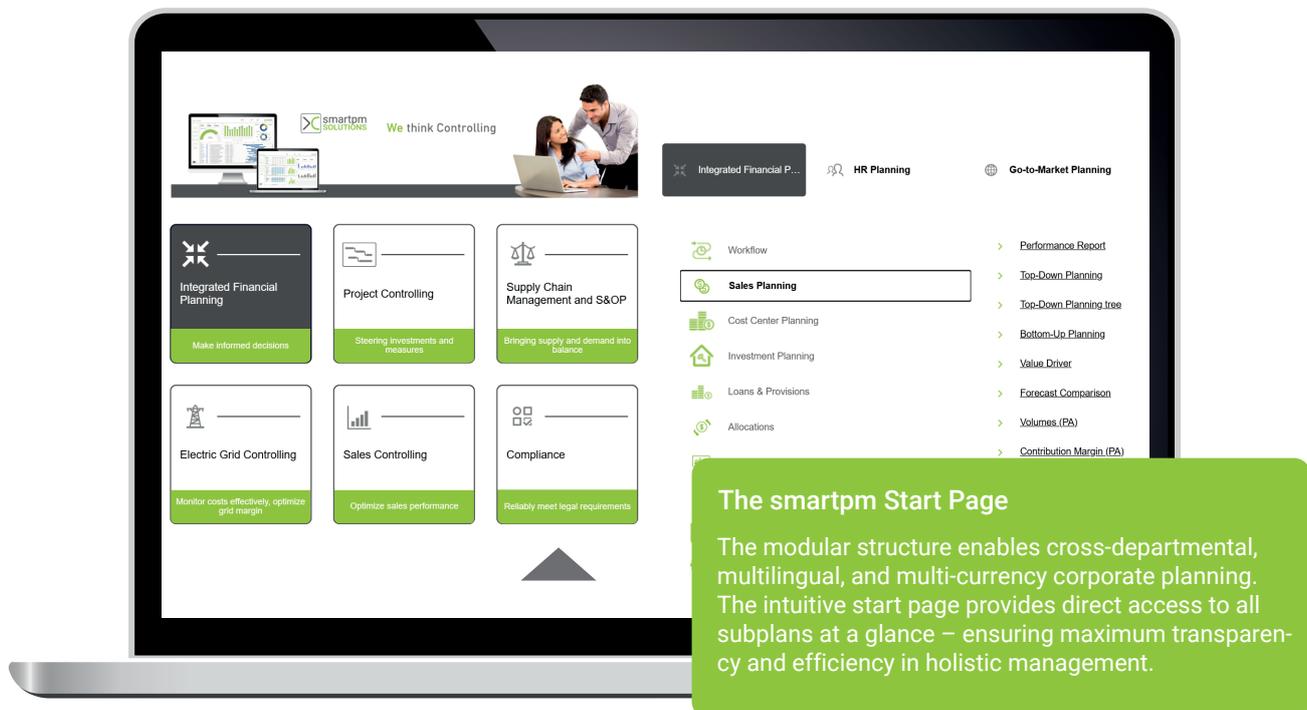
"The integration of Power BI by smartpm.solutions has revolutionized our financial planning and given us a completely new perspective on our corporate data. I highly recommend both Microsoft Power BI technology and working with smartpm.solutions."

**Rolf Herrmann - ONEO**  
Head of Subservice Engineering



## Why Planning in MS Power BI is Certainly Interesting for You

From both IT and controlling perspectives, the new smartpm visuals are attractive. They combine low TCO (Total Cost of Ownership), high performance, and ease of use in an established Microsoft environment. From top-down guidelines, detailed planning, and scenario simulation to AI-powered forecasting – all this is now possible with Power BI.



smartpm.solutions Power BI visuals use powerful OLAP technology for writing, distributing, and calculating plan values. From the Power BI start page, department-specific planning content and subplans can be accessed. The big advantage: proven business planning logic comes preconfigured, ready to use immediately, and can be flexibly adapted to specific requirements. Individual departments or the entire company can be managed in an integrated way on this planning platform.

## Selecting the right FP&A (CPM & BI) software

### smartpm FP&A software selection workshop

Want to find the right controlling solution for your company? In the smartpm selection workshop we analyze your requirements, identify optimization potential, and work with you to select the right technology – neutral, efficient, and field-tested. So you make the right decision. Right from the start.

<https://smartpm.solutions/cpm-software-selection>



## Power BI as a Planning Platform – Transparent, Integrated, Collaborative

Always keep track of goals, forecasts, and tasks directly in Power BI – ideal for coordinated planning across teams and departments. Thanks to seamless integration, the performance dashboard fosters collaboration between controllers and business units: all planning processes, progress, and variances are shown transparently, data-driven, and collaboratively.



**Performance Dashboard**  
Gain a compact overview of all relevant sales KPIs. It shows top-down guidelines, bottom-up sales planning, rolling forecasts, and target achievement ranges. Value-driver-based planning is also possible in the performance dashboard. Sales planning and ad-hoc analysis are performed multidimensionally across products, product groups, sales regions, periods, value types, sales reps, and more.

Teams integration displayed in the performance dashboard enables simple collaboration and fast tracking of joint initiatives. Tasks can be scheduled and adjusted in sequence using the Gantt chart.

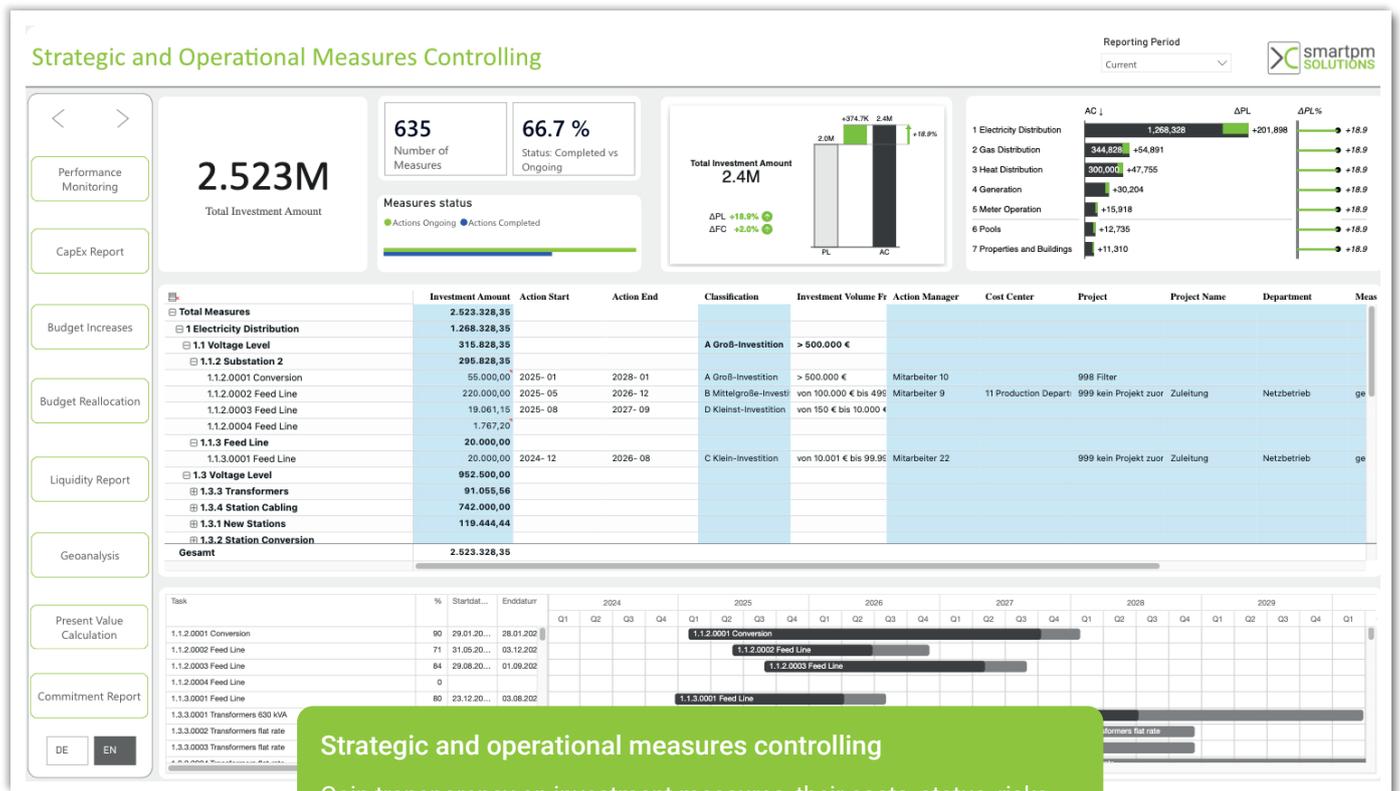
Customer feedback:

“OLAP technology combined with Power BI and smartpm planning solutions convinced our entire controlling team in direct technology comparison and after thorough evaluation. High performance, insightful visualization, and professional expertise come together here.”

**Christian Graumann - Stadtwerke Bochum**  
Head of Strategic Controlling

# Transparent Initiative Management with AI Power

Organize and manage initiatives of all kinds down to the level of individual responsibilities. From construction projects to cost-saving initiatives and sales promotions: the integrated AI assistant additionally provides analyses, insights, and recommendations in natural language. This makes the data immediately understandable for both controllers and non-experts, with opportunities and risks clearly visible.



**Strategic and operational measures controlling**

Gain transparency on investment measures, their costs, status, risks, and timelines at a glance. This enables quick decisions and prioritization. Planned projects can be directly managed in the Gantt chart, with links to cost center accounting/P&L, balance sheet, and cash flow.



## smartpm stands for...

Modern, market-leading technology for integrated planning, analysis, budgeting, forecasting, reporting, and consolidation combined with business consulting and excellent service

4,9/5 ★ Project satisfaction    6,8/7 ★ Support satisfaction    4,8/5 ★ Employee satisfaction

# Comprehensive Planning Approaches with AI

Driver-based scenario simulations and comprehensive planning approaches can be carried out directly in Power BI. This way, you always keep budgets, forecasts, and variances in view – down to document level.

The integrated AI assistant Smartofant accompanies you through the entire planning process: it automatically analyzes your data, identifies variances, delivers clear analyses, and suggests concrete actions – easy to understand for both FP&A experts and non-specialists.

**Value Driver Tree**

Category: DACH | Period: 2025 | Version: Budget

Price	2025	Jan 2025	Feb 2025	Mar 2025	Apr 2025	May
<b>Product Group A</b>	<b>550,21</b>	<b>1.108,97</b>	<b>0,00</b>	<b>607,04</b>	<b>576,52</b>	<b>1.02</b>
Product 1	810,60	403,75	0,00	0,00	0,00	1,64
Product 2	1.463,22	1.860,28	0,00	2.049,09	2.204,02	2,23
Product 3	50,22	0,00	0,00	0,00	0,00	
<b>Product Group B</b>	<b>244,33</b>	<b>73,71</b>	<b>79,01</b>	<b>244,62</b>	<b>85,92</b>	<b>31</b>
Product 4	24,46	21,24	25,32	24,06	24,06	2
Product 5	51,53	45,76	51,42	51,42	51,42	5
Product 6	257,25	225,44	260,21	263,93	260,21	26
Product 7	903,29	0,00	0,00	1.078,94	0,00	1,38
<b>Product Group C</b>	<b>65,54</b>	<b>6,34</b>	<b>5,97</b>	<b>5,71</b>	<b>6,77</b>	<b>9</b>

Quantity	2025	Jan 2025	Feb 2025	Mar 2025	Apr 2025	May
<b>Product Group A</b>	<b>3.654,89</b>	<b>412,81</b>	<b>281,75</b>	<b>182,09</b>	<b>223,68</b>	<b>21</b>
<b>Product Group B</b>	<b>3.418,16</b>	<b>325,91</b>	<b>294,17</b>	<b>267,77</b>	<b>265,90</b>	<b>27</b>
Product 4	956,57	95,36	88,96	77,23	77,23	7
Product 5	1.066,02	103,87	85,73	85,73	85,73	8
Product 6	779,77	76,50	63,72	66,07	63,72	6
Product 7	615,79	50,19	55,75	38,74	39,22	4
<b>Product Group C</b>	<b>1.367,95</b>	<b>103,07</b>	<b>118,89</b>	<b>96,40</b>	<b>108,25</b>	<b>10</b>
<b>Totals</b>	<b>8.441,00</b>	<b>841,79</b>	<b>694,80</b>	<b>546,26</b>	<b>597,83</b>	<b>58</b>

Revenue	COGS	Gross Profit
<b>3.97M</b>	<b>440.71K</b>	<b>3.53M</b>

**Value-driver analysis**  
The interactive dashboard shows at a glance which factors significantly influence business success – providing a direct basis for targeted decision-making and planning. Key drivers such as price, quantity, and costs are visualized over multiple years. It highlights the most important levers and their impact on revenue and profit. Scenarios can be simulated by varying these drivers.

**Cost Center Planning**

Cost Center: 94001600-Product Launches and Digitalization | Current year: 2025 | Plan year: 2026 | Plan version: Budget

Cost Center	2023 - Actuals	2024 - Actuals	2025 - Forecast	2026 - Budget	2027 - Budget	2028 - Budget	2029 - Budget	Comments
<b>Result</b>	<b>54.992</b>	<b>61.182</b>	<b>58.979</b>	<b>61.182</b>				
<b>Net Income/Loss</b>	<b>54.992</b>	<b>61.182</b>	<b>58.979</b>	<b>61.182</b>				
<b>Result after Internal Cost Allocation</b>	<b>54.992</b>	<b>61.182</b>	<b>58.979</b>	<b>61.182</b>				

Actuals PY	Top Down	Budget	Top-Down vs. Budget
<b>58,98K</b>	<b>69,81K</b>	<b>61,18K</b>	<b>8,632</b>

**Smartofant** Cost center planning

12:00 PM  
Dear Anton, I'll check which cost centers you are responsible for!

12:00 PM  
You are currently assigned the following cost centers. Which ones should be planned?

- 94001600-IT-Safety
- 94001610-011-IT-Management
- 94001612-IT-Production
- 94001613-Product Launches and Digitalization

Type something...

## Cost center planning with AI assistant

Traditional cost center planning is enriched with the modern AI assistant Smartofant, helping controllers and CFOs move more quickly from numbers to actionable decisions. The AI support saves end users (cost center managers) time and simplifies analysis. There is full transparency at cost center level: budget, actuals, and forecast can be compared in detail. Variance analyses down to document level allow direct derivation of actions.

# Smartofant and ChatGPT Integration – Intelligent AI Assistants

AI-powered assistants such as ChatGPT or machine learning further support interpretation and scenario creation. This makes controlling faster and more accessible. Users can ask direct questions, and the assistant delivers clear answers immediately. AI-driven forecasts with machine learning enable more accurate predictions, scenarios, and range planning.

### Forecast

Version: AI Forecast | Measure: Input | Legal Entity: Stadtwerke GmbH | Cost Center: 94031000

	2024-08	2024-09	2024-10	2024-11	2024-12	2025-01	2025-02
Result after Taxes	1339,53	1841,94	2121,85	2006,15	1989,85	0,00	0,00
Result before Taxes	1339,53	1841,94	2121,85	2006,15	1989,85	0,00	0,00
Revenue excluding Electricity/N...	1339,53	1841,94	2121,85	2006,15	1989,85	0,00	0,00
Revenue	1339,53	1841,94	2121,85	2006,15	1989,85	0,00	0,00
Subtotal Other Services	1339,53	1841,94	2121,85	2006,15	1989,85	0,00	0,00
Revenue from Ancillary Business...	1339,53	1841,94	2121,85	2006,15	1989,85	0,00	0,00
Joint Revenue	450,81	619,81	714,02	675,12	669,62	0,00	0,00
Income from Commercial Mana...	429,41	590,51	680,22	643,11	637,91	0,00	0,00

#### Smartofant

09:45  
Transaction data is analyzed using AI.

**Example – Document Data, Cost Type: 54090100 – External Data Processing**

**Analysis:**  
Costs fluctuate between -100 and -2700. Highest expenses occurred in 2024 for annual security audits and in 2025 for test data processing for the digital platform.

**Vendors:**  
BitData GmbH and SoftLine AG  
Forecast for 2026: Based on past trends and the growing importance of data processing for security and digitalization, costs are expected to rise by 10% in 2026.

**Conclusion:**  
Expenses for external data processing are essential for security and digitalization. It is advisable to prioritize these costs in 2026.

Type something...

**Smartofant – Your AI Assistant in FP&A / xP&A**

In natural language, Smartofant provides clear answers: it automatically analyzes controlling data (cost centers, trends, variances) and delivers instantly understandable results and recommendations – for both controllers and non-experts. For example, users can simply ask “Why are costs rising?” and get clear answers without needing to dive deep into the numbers.

### Top Down Planning

Category: DACH | Period: 2025 | Measure: COGS | Version: Budget

2.88M

Revenue

337.23K

COGS

2.54M

Gross Profit

8.28K

Quantity

	2025	Jun 2025	Feb 2025	Mar 2025	Apr 2025	May 2025	Jun 2025	Jul 2025	Aug 2025	Sr
Product Group A	84.954,29	13.201,16	15.605,11	4.888,40	2.125,19	10.333,06	6.925,21	6.415,86	2.207,58	1,8
Product Group B	114.123,67	13.274,56	4.356,00	26.182,15	18.363,00	16.474,00	6.654,10	5.729,12	1.971,28	1,6
Product 4	34.106,01	4.351,84	-604,10	8.835,80	4.101,56	7.521,90	1.564,00	1.656,86	570,10	1,0
Product 5	24.905,87	3.417,96	1.447,81	7.763,29	1.439,84	3.229,04	225,66	1.469,28	505,55	1,0
Product 6	41.986,00	3.616,47	2.143,93	7.043,83	12.113,02	3.769,30	4.706,73	1.710,08	588,41	1,0
Product 7	13.125,79	1.888,28	1.367,36	2.549,23	708,58	1.962,86	157,71	892,89	307,23	1,0
Product Group C	138.150,30	7.670,90	23.392,04	15.646,94	11.568,31	7.442,83	7.328,86	3.967,02	6.884,35	7,3
Totals	337.228,26	34.146,61	43.352,18	46.717,50	32.051,49	34.250,49	20.508,17	16.112,00	13.063,21	10,8

#### smartPM ChatGPT Integration

Show me different revenue and cost allocation scenarios if management sets a 10% revenue growth target.

To achieve a 10% revenue growth target, management could explore different scenarios based on various factors such as pricing, volume, and cost management. Here are a few scenarios to consider:

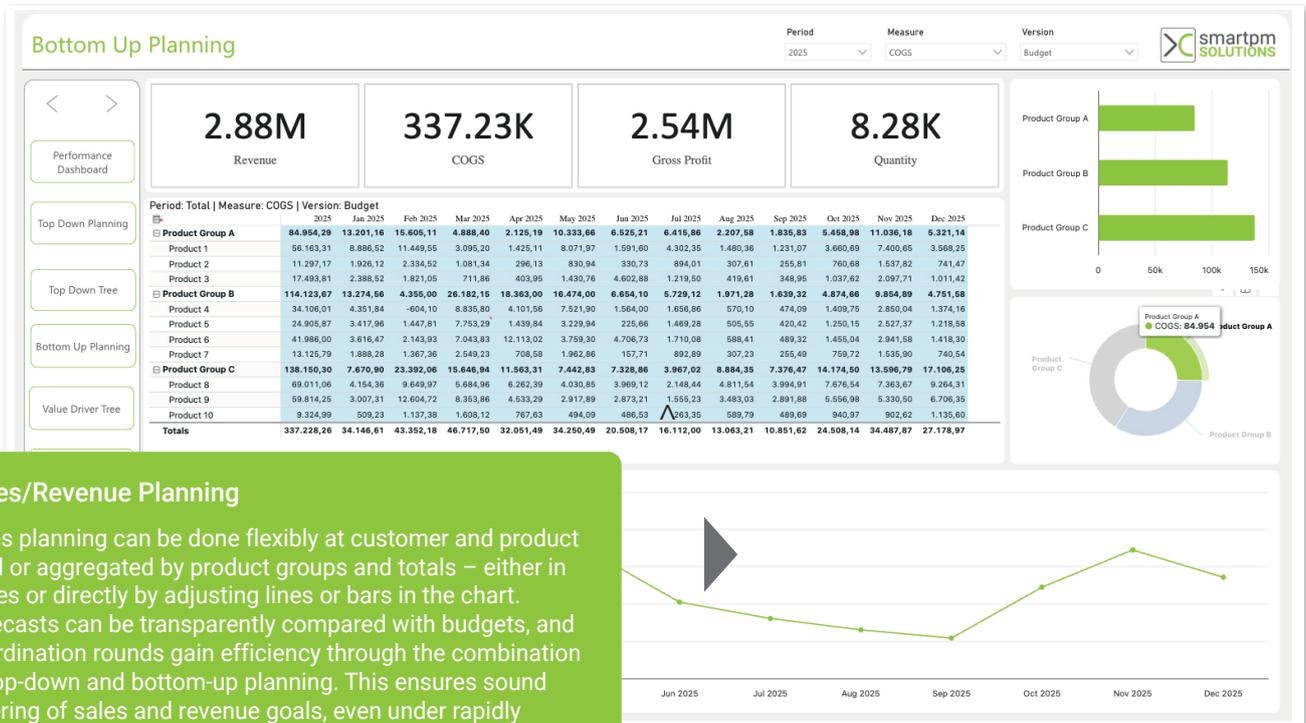
- Price Increase:**
  - Revenue: Increase prices by 10% for all products or services.
  - Cost: Maintain current costs, but monitor for any price elasticity impact on volume.
- Volume Growth:**
  - Revenue: Increase sales volume by 10% through marketing efforts or expanding into new markets.
  - Cost: Slightly increase costs to support higher production, but enjoy economies of scale.
- Product Mix:**
  - Revenue: Focus on selling higher-margin products that could contribute more to total revenue.
  - Cost: Adjust production and marketing strategies towards these higher-margin offerings.
- Operational Efficiency:**
  - Revenue: Maintain current sales levels but optimize operational efficiency to redirect cost savings to revenue-enhancing activities.
  - Cost: Reduce overhead through automation or process improvements to increase profitability.
- Market Expansion:**
  - Revenue: Enter new geographical markets or target new customer segments to grow revenue.
  - Cost: Initial costs for market entry might rise, but should stabilize as the market presence strengthens.

Each scenario depends on the specific industry context and competitive landscape. Adjusting pricing, expanding markets, or optimizing cost structures can collectively drive the desired revenue growth.

Please enter your question here

# Efficient Sales and Project Planning in Power BI

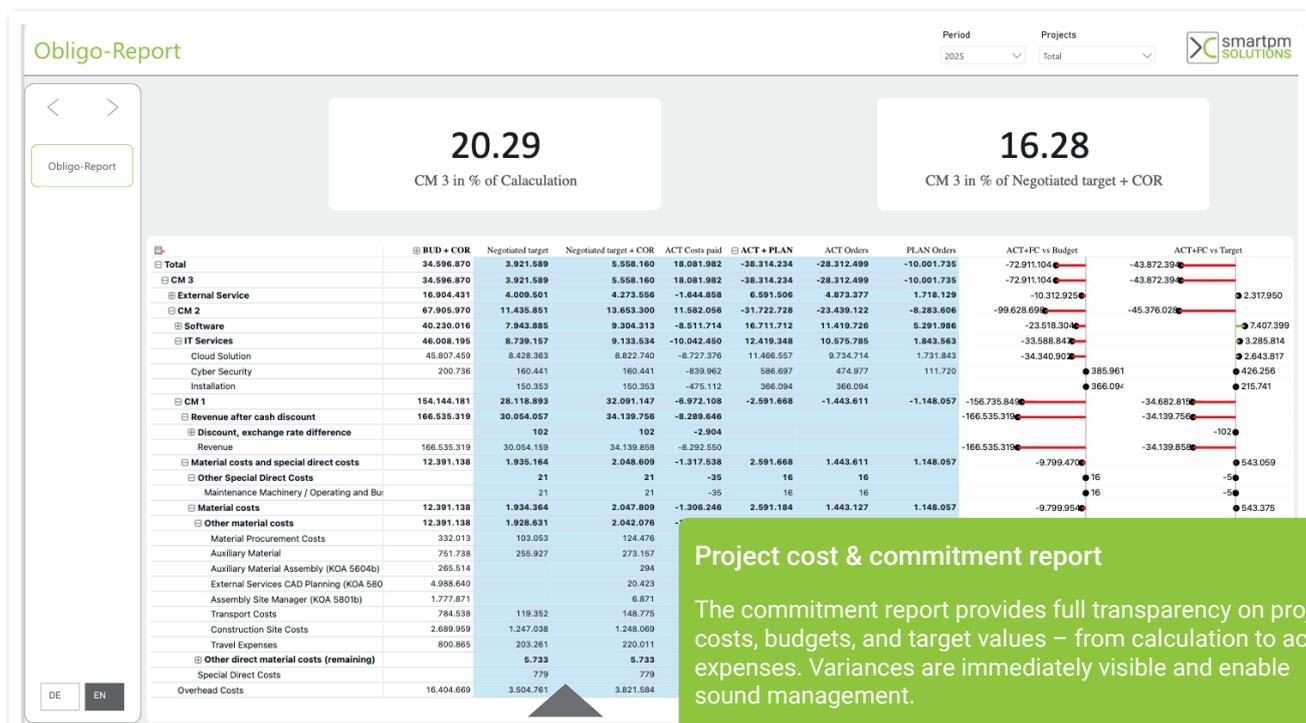
With smartpm visuals in Power BI, planning becomes simple: you get a powerful and user-friendly solution for planning, reporting, commentary, and ad-hoc analysis.



**Sales/Revenue Planning**

Sales planning can be done flexibly at customer and product level or aggregated by product groups and totals – either in tables or directly by adjusting lines or bars in the chart. Forecasts can be transparently compared with budgets, and coordination rounds gain efficiency through the combination of top-down and bottom-up planning. This ensures sound steering of sales and revenue goals, even under rapidly changing conditions.

In project business, costs and revenues are central management parameters. That's why smartpm focuses strongly on transparent control of both individual projects and the entire project portfolio.



**Project cost & commitment report**

The commitment report provides full transparency on project costs, budgets, and target values – from calculation to actual expenses. Variances are immediately visible and enable sound management.

# Simple Range and S&OP Planning

With range planning you can quickly simulate different scenarios – e.g., price changes, sales volumes, or production costs. This lets you instantly see which drivers have the greatest impact on your results.

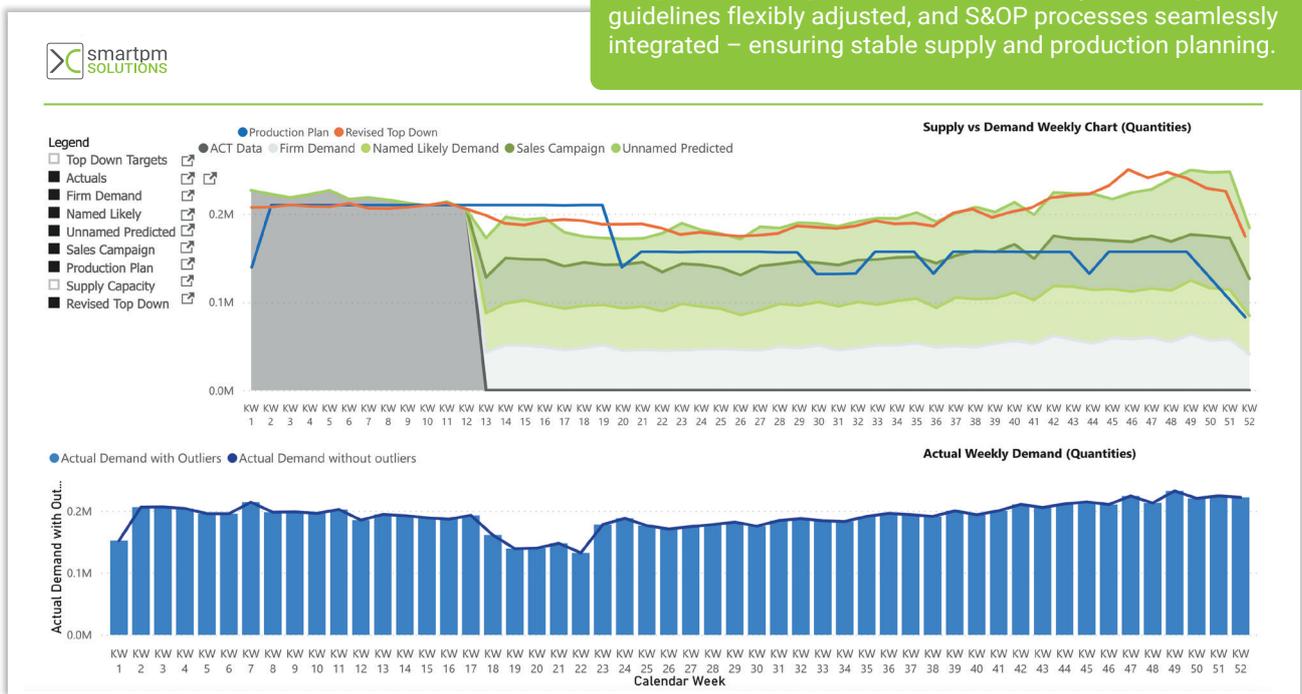


**Forecasts & Ranges**

Depending on which forecast models are applied, using modern statistical and AI-based methods, different prediction models can be simulated in advance.

**Align procurement, production, and demand**

Balance demand and supply in a system-supported way, identify bottlenecks early, and react quickly to market changes. Forecasts and production capacities are automatically linked, top-down guidelines flexibly adjusted, and S&OP processes seamlessly integrated – ensuring stable supply and production planning.



# Full-Fledged Integrated Financial Planning in Power BI

In the Power BI interface, P&L, balance sheet, and cash flow are mapped in a consistent model. This provides an integrated view of the company's financial situation – from revenue and cost development to liquidity.

- ▶ P&L positions are automatically carried over into balance sheet and cash flow.
- ▶ Payment factors (e.g., receivables or liabilities) make cash flow effects transparent.
- ▶ IBCS-compliant presentation ensures clear communication and greater transparency.

## Profit & Loss Statement

	PY	AC	ΔPY	ΔPY%
Sales & Operating Revenues	5.2M	37.6M	+32.4M	+619.1%
Cost of Material	-2.0M	-13.3M	-11.3M	-571.6%
<b>= Gross Margin - Accounting</b>	<b>3.3M</b>	<b>24.4M</b>	<b>+21.1M</b>	<b>+648.0%</b>
Operating Costs	-1.9M	-5.5M	-3.6M	-189.7%
Personnel Expenses	-1.3M	-5.0M	-3.7M	-275.7%
Other Expenses	-572.8K	-510.9K	+61.9K	+10.8%
<b>= EBITDA</b>	<b>1.3M</b>	<b>18.8M</b>	<b>+17.5M</b>	<b>+1,296.9%</b>
Depreciation and Amortisation	-384.2K	-820.8K	-436.6K	-113.6%
<b>= EBIT - ET</b>	<b>963.7K</b>			
Financial results	137.6K			
<b>= EBT</b>	<b>1.1M</b>			
Tax	-238.5K			
<b>= Net income</b>	<b>862.8K</b>			

- Sales & Operating Revenues 37.6M ▲ +619.1%  
Hi, bitte um ein Update  
irrsinniges Wachstum 2023
- Cost of Material -13.3M ▼ -571.6%  
Material Cost increases by 71%
- Gross Margin - Accounting 24.4M ▲ +648.0%  
Test
- Personnel Expenses -5.0M ▼ -275.7%  
Personnel Exp 80 K...
- Other Expenses -510.9K ▲ +10.8%  
Delta 6 K

## Balance Sheet

	PY	AC	ΔPY	ΔPY%
<b>Total Assets</b>	<b>44.2M</b>	<b>282.0M</b>	<b>+237.8M</b>	<b>+538.3%</b>
Assets	44.2M	282.0M	+237.8M	+538.3%
Non-Current Assets	37.2M	189.0M	+151.8M	+408.1%
Non-Current Financial Assets	24.6M	135.0M	+110.5M	+449.6%
Property, Plant, Equipment	12.6M	54.0M	+41.3M	+327.2%
Current Assets	7.0M	93.0M	+86.0M	+1,233.1%
Inventories	2.9M	37.8M	+34.9M	+1,187.0%
Trade Receivables	2.2M	18.7M	+16.4M	+744.8%
Cash at Hand and in Banks	1.4M	33.6M	+32.3M	+2,300.4%
Current Financial Assets	474.8K	2.8M	+2.4M	+496.4%
<b>Total Equity &amp; Liabilities</b>	<b>-42.4M</b>	<b>-252.0M</b>	<b>-210.1M</b>	<b>-494.9%</b>
Equity	-4.5M	-20.5M	-16.0M	-357.2%
Equity	-4.5M	-20.5M	-16.0M	-357.2%
Profit/ Loss carried forward	-9.5M	-16.3M	-14.5M	-767.5%
Share Capital and Capital Reserves	-2.6M	-4.1M	-1.5M	-58.4%
Liabilities	-38.0M	-232.1M	-194.1M	-511.1%
Long-term Liabilities	-15.5M	-55.3M	-41.7M	-958.4%
Long-term Debt	-13.5M	-55.3M	-41.7M	-958.4%
Current Liabilities	-24.5M	-176.9M	-152.4M	-623.2%
Current Provisions		-82.0K	-82.0K	-608.4%
Trade Payables	-2.8M	-20.9M	-17.7M	-1,884.1%
Other Current Liabilities	-7.2M	-143.5M	-136.3M	-1,884.1%
Accrued Expenses and Deferred Income	-14.4M	-12.9M	+1.6M	+11.3%

## Cash Flow

(in k€)

	2020 01	2020 02	2020 03	2020 04	2020 05	2020 06	2020 07	2020 08	2020 09	2020 10	2020 11	2020 12
<b>Cash Flow from Operating Activities</b>	<b>(50,617)</b>	<b>(344)</b>	<b>(335)</b>	<b>(334)</b>	<b>(328)</b>	<b>(6,494)</b>	<b>(6,473)</b>	<b>(6,439)</b>	<b>(6,368)</b>	<b>(6,276)</b>	<b>(7,292)</b>	<b>(9,257)</b>
Net Income Before Tax	(18,191)	(210)	(609)	(662)	(725)	(1,299)	(1,418)	(1,584)	(2,055)	(2,397)	(2,895)	(3,971)
Depreciation												
Provisions	(41)											(41)
Income Taxes	2,847	43	128	135	143	235	247	262	336	359	390	486
Change in Inventories	19,321	420	618	647	691	1,171	1,271	1,424	1,920	2,281	2,842	5,224
Accounts Receivable	9,523	189	413	417	426	685	715	786	965	1,104	1,358	2,074
Other Changes in Current Assets	19,359	683	412	512	631	1,712	1,921	2,197	2,420	2,899	2,348	2,362
Accounts Payable	(11,018)	(747)	(369)	(374)	(375)	(1,126)	(1,133)	(1,162)	(992)	(1,004)	(1,031)	(1,194)
Other Changes in Current Liabilities	(72,417)	(721)	(927)	(1,009)	(1,119)	(7,872)	(8,077)	(8,361)	(8,961)	(9,518)	(10,306)	(14,197)
Extraordinary Items												
<b>Cash Flow from Investing Activities</b>	<b>97,281</b>	<b>3,869</b>	<b>3,873</b>	<b>3,892</b>	<b>3,918</b>	<b>10,098</b>	<b>10,141</b>	<b>10,195</b>	<b>10,250</b>	<b>10,339</b>	<b>10,453</b>	<b>12,533</b>
Tangible Assets	29,055	2,081	2,090	2,113	2,141	2,160	2,204	2,259	2,314	2,402	2,515	2,645
Intangible Assets												
Financial Assets	68,227	1,788	1,783	1,779	1,776	7,938	7,937	7,936	7,936	7,937	7,938	9,889
<b>Cash Flow from Financing Activities</b>	<b>(31,959)</b>	<b>(2,312)</b>	<b>(2,336)</b>	<b>(2,365)</b>	<b>(2,402)</b>	<b>(2,419)</b>	<b>(2,483)</b>	<b>(2,571)</b>	<b>(2,694)</b>	<b>(2,870)</b>	<b>(2,431)</b>	<b>(2,492)</b>
Changes in Equity	(2,239)	(172)	(172)	(172)	(172)	(172)	(172)	(172)	(172)	(172)	(172)	(172)
Deposits/Withdrawals from Issue of Bonds and Taking out Loans												
Other Changes in Non-Current Liabilities	(29,720)	(2,140)	(2,164)	(2,193)	(2,229)	(2,247)	(2,311)	(2,399)	(2,522)	(2,697)	(2,259)	(2,319)
<b>Cash and Cash Equivalents at the Start of the Period</b>	<b>14,131</b>	<b>28,837</b>	<b>30,050</b>	<b>31,252</b>	<b>32,446</b>	<b>33,634</b>	<b>34,819</b>	<b>36,003</b>	<b>37,189</b>	<b>38,377</b>	<b>39,570</b>	<b>40,300</b>
<b>Change in Cash and Cash Equivalents</b>	<b>14,705</b>	<b>1,213</b>	<b>1,202</b>	<b>1,194</b>	<b>1,188</b>	<b>1,185</b>	<b>1,184</b>	<b>1,185</b>	<b>1,188</b>	<b>1,194</b>	<b>729</b>	<b>785</b>
<b>Cash and Cash Equivalents at the End of the Period</b>	<b>28,837</b>	<b>30,050</b>	<b>31,252</b>	<b>32,446</b>	<b>33,634</b>	<b>34,819</b>	<b>36,003</b>	<b>37,189</b>	<b>38,377</b>	<b>39,570</b>	<b>40,300</b>	<b>41,084</b>

## All Benefits of Integrated Planning in Power BI by smartpm at a Glance

The proven smartpm financial planning model delivers quick results already in the implementation phase – with high functionality, broad user acceptance, and attractive Total Cost of Ownership (TCO). In this fully integrated system for planning, consolidation, analysis, forecasting, budgeting, and reporting, departments can make adjustments themselves, optimize processes, and collaborate on a single platform with high user acceptance – all without external support.

Standardized dashboards and reports deliver meaningful insights at the push of a button – enabling sound, cross-departmental decision-making. The planning logic goes beyond classical financial planning and also supports HR, sales, and production.

### What makes smartpm special?



Proven, standardized, market-leading technology base with continuous updates

Fully automated integration into key systems (ERP, CRM, accounting) – standardized and automated data consolidation – single point of truth

Maximum data transparency and reliability, real-time results

Work in an intuitive interface, independent of location and device

smartpm's integrated planning module comes with preconfigured, ready-to-use business content that can be flexibly adapted

Fast & cost-efficient implementation (just weeks), solution maintenance and adjustments by your own team

Standardized and automated reports and distribution, available anytime and anywhere, with flexible role concepts

Agile and reliable decision-making: simulate decisions and analyze impacts on P&L, balance sheet & cash flow

One system for planning, consolidation, ad-hoc analysis, budgeting, reporting, forecasting, and artificial intelligence

### Digitization in performance management



## 7 Good Reasons to Choose smartpm

Why we are the right partner for your business!



A single point of truth: seamless and automated integration of source systems



Flexible, Excel-like performance management technology combined with business content



Integrated financial planning, analysis, budgeting, forecasting, and reporting from a single source



User-friendly, innovative solutions with artificial intelligence



smartpm solutions are available for: IBM Planning Analytics, MS Power BI, Jedox, and SAP SAC



Competent and experienced team with a performance management background; 4.9/5 project rating



Your reliable partner for digitalizing performance management before, during, and after the project

You might also be interested in...

### smartpm.solutions Health-Check



<https://smartpm.solutions/healthcheck>

Free expert consultation available

Expert talk with our specialists

< 2025 >

MO.	DI.	MI.	DO.	FR.	SA.	SO.
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
1	2	3	4	5	6	7







**Book appointment** →



<https://smartpm.solutions/request-live-demo>

