

Financial Reporting and Analytics: Drive your business with insights, not instincts

Linda Hull
Gabrielle Giertz, CPA

November 9, 2022



The Association of
Accountants and
Financial Professionals
in Business



Webinar Features and CPE Credit

Q&A

Asking Questions



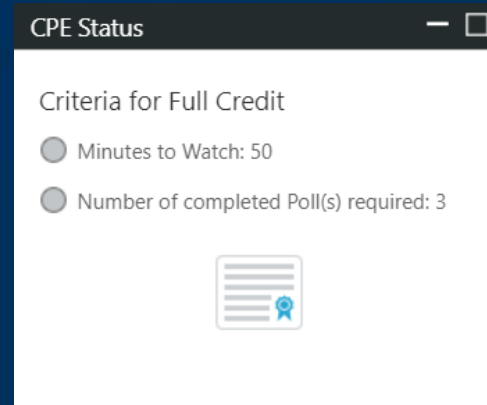
Closed Captioning



Help



CPE Credit



The Association of
Accountants and
Financial Professionals
in Business



Moderator

Steve Shannon

**Director of Partnership Marketing,
Business Development**

IMA



The Association of
Accountants and
Financial Professionals
in Business

Featured Presenters



Linda Hull
Solution Marketing Director,
Planning Solution Marketing
Workday



Gabrielle Giertz, CPA
Director, Professional Services
Kainos

Linda Hull's Biography

- Linda Hull has supported Workday Adaptive Planning for almost ten years, working with FP&A teams to assess their planning/forecasting/analysis requirements, demonstrating Workday Adaptive Planning capabilities and more recently, supporting the solution marketing team. Prior to that, Linda spent over a decade in FP&A managing the budget, forecasting, and reporting process for two telecom and communications companies.
- Linda holds a Bachelor's degree in Business Administration - Finance from the University of Connecticut and Masters of Business Administration - Marketing from the University of New Haven.

Gabrielle Giertz's Biography

- Gabrielle Giertz is a financial planning and analysis pro. She is currently Director of Professional Services at Kainos. Gabrielle spent several years at Workday Adaptive Planning as a Solution Architect, some of her responsibilities were implementing budgets, forecasts and reports for a wide variety of clients across multiple industries. She effectively translated financial business strategy and requirements into corporate performance management designs for many companies.
- Previously, while at CohnReznick, she was instrumental in helping CFOs optimize their organization's performance and maximizing their value. Gabrielle earned a BA from Northwestern University, an MBA from the University of Kansas, and is also a CPA and member of the AICPA.

Learning Objectives

1. Recognize the varied financial reporting and analysis requirements across your organization.
2. List best practices in building, maintaining, and consuming reports.
3. Explain how to deliver self-service analysis that puts power in the hands of your finance team.



Workday Adaptive Planning

Enterprise Planning, Reporting & Analysis for a Changing World

Continuous Planning

Update plans with ease, with agile planning and flexible modeling.

Richer, Timely Insights

Deliver visual analytics, self-service insights and pixel-perfect reports with ease.

Company-Wide Planning

Enhance collaboration with integrated and aligned planning.

Adapt and Perform at Scale

Scale and grow with modern technology that leverages unlimited dimensionality and a purpose-built integration framework.



Agenda

1. Reporting Considerations
2. Reporting: a CEO's Perspective
3. Reporting: a CFO's Perspective
4. Reporting: a Financial Analyst's Perspective
5. Summary & Best Practices
6. Q&A



Poll Question 1:

What is your biggest reporting challenge?

- a. Gathering, cleansing, and reconciling data
- b. Ensuring consistency in reports
- c. Delivering ad-hoc reports & insights
- d. Formatting formal reports

Poll Question 1 Results: (Placeholder)

Introduction

Delivering Insights through Financial Reports



Reporting Types



The Consumer



Use Case

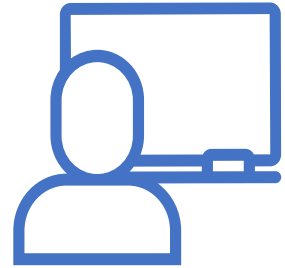
Three Reporting Consumers



Chief Executive
Officer



Chief Financial
Officer



Accountant /
Financial Analyst

Poll Question 2:

Which tool do you use most often for financial reporting?

- a. Accounting system reports
- b. Microsoft Office Products (i.e., Excel, Word, PowerPoint)
- c. Google Suite Tools
- d. Business Intelligence Product (e.g., Tableau, Qlik, PowerBI...)
- e. Other

Poll Question 2 Results: (Placeholder)

Use Cases

Chief Executive Officer: Visual Analytics



Chief Financial Officer: Reporting & Analysis





Financial Analyst: Prepping Board Deck

Poll Question 3:

What is the distribution means you typically use for sharing financial reports within your organization?

- a. Hardcopy
- b. File attachment (CSV, Excel...) or shared Google file
- c. Live report via a shared business application
- d. All of the above
- e. Other

Poll Question 3 Results: (Placeholder)

Best Practices

Best Practices

- Consider your audience
- Tell a story with the data
- Standardize and keep it “tidy”
- Use interactive elements
- Never stop evolving

Poll Question 4:

Would you like to receive more information about the Workday products or Kainos services?

If you check yes, please note this will nullify any previous requests you've made to IMA to not share your contact information with Workday and/or Kainos

- a. Yes, Workday only
- b. Yes, Kainos only
- c. Yes, both Workday and Kainos
- d. No, thank you

Poll Question 4 Results: (Placeholder)

Questions and Answers



Gabrielle Giertz, CPA
Director, Professional Services
Kainos



Linda Hull
Solution Marketing Director,
Planning Solution Marketing
Workday



Steve Shannon
Director, Partnership Marketing,
Business Development
IMA

Thank You to Our Featured Presenters!



Linda Hull
Solution Marketing Director,
Planning Solution Marketing
Workday



Gabrielle Giertz, CPA
Director, Professional Services
Kainos

Final Reminders

- ▶ **Complete the Evaluation poll** – 2 options
 - On your screen
 - Evaluation Survey icon at the bottom of your console
- ▶ **Access to your CPE Certificate** – 2 options
 - Click the “CPE” icon at the bottom of your console
 - or
 - Click the link in your post-event e-mail
- ▶ Please print a copy of the CPE certificate for your records.
- ▶ Your CPE credit will be automatically recorded in your transcript.

Thank you!

Workday

www.Workday.com



The Association of
Accountants and
Financial Professionals
in Business

