

Data visualization and AI storytelling

Revolutionize Financial Planning and Analysis (FP&A) with cutting-edge AI technology that transforms financial data into clear narratives by seamlessly compiling user notes and comments.



At Unit4, we are exploring the use of pragmatic AI to help organizations communicate insights from their financial data easily with AI-enabled smart assistance.

The Office of the CFO and Finance can now repurpose time and reduce effort by utilizing AI storytelling and data visualization for FP&A to support financial reporting and operational planning.

Even non-technical staff can identify trends immediately in support of better decision-making without having to sift through data and supporting notes from different locations.

How it works

- Automated collection and aggregated comments from FP&A system users
- Utilizes AI to summarize these comments from real users
- Provides context by helping finance teams understand trends and performance.

Benefits

- Increased confidence and support for decision making
- Time freed up for recommendations instead of crunching data.
- Greater collaboration and organizational wide visibility
- Enhance flexibility, simplify processes and save time
- Work smarter by connecting and aligning comments

The FP&A AI Data Storytelling solution can quickly help identify 3 key questions:

1. Which areas of our financial performance have exceeded or fallen short of expectations?
2. What are the key factors driving these results?
3. What financial outcomes are projected for the rest of the year?

AI Data Storytelling in-action

UNIT4 FP&A 0.1 Solutions (new) 0.5 Best of Reporting ... 0.6 Dashboards (new) GENAI - Comment su...

Version CO_Cost Object mV_Mirrored Version Period mP_Mirrored Period

Base Case Cost Centers Worst Case COVID-19 2024 PLAN 2024 PLAN

Country	Summary YTD	Summary YTG	Summary Full Year	Actions
PAT Austria	COVID continues to substantially affect revenues (-14%) compared to the Base Case. Nothing planned yet in Base Case.	COS will decrease in line with revenues, however decrease in gross margin of 3m is expected.	Overall contribution margin cannot be achieved for the full year due to decrease in sales in general in Austria. Measures to reduce the reduction in sales will be implemented. COS will be reduced accordingly.	Action: Agenda point for board meeting with sales team to reduce the impact from COVID.
0180 France	Performance so far in line with last year.	Monthly sales expected to increase, due to additional account managers. This will lead to an almost 20% increase of the avg. monthly bookings compared to PY.	Net result for France expected on BUD. Higher sales, but also higher HR costs from more expensive sales managers.	Discussion in board meeting if the same success can be replicated in other regions.
PDE Germany	Negative trend since avg sales are lower than in PY. BUD constant in YoY comparison. From collective agreement a very high salary increase of 10%+ is to be expected. FC was adjusted accordingly. Higher HR costs will have an impact on the net result.	From collective agreement a very high salary increase of 10%+ is to be expected. FC was adjusted accordingly. Higher HR costs will have an impact on the net result.	Due to higher salaries, net result target won't be achieved.	Check pipeline and marketing activities to further increase monthly order entry.
PEN England	Solid performance for YTD. Revenues and cost under control and performance as in BUD.	Due to new account managers, improvement in 2nd HY expected.	Given the positive outlook for YTG, it can be expected that England will outperform the targets.	Focus on enablement of new account managers.
PFR France	Performance so far in line with last year.	Monthly sales expected to increase, due to additional account managers. This will lead to an almost 20% increase of the avg. monthly bookings compared to PY.	Net profit expected above BUD target.	
PSE Sweden	Problematic weaker performance compared to PY.	Current FC shows no improvements for 2nd HY.	Higher net profit expected due to constant HR costs and higher efficiency.	Board Discussion if Swedish enablement could be relevant also for other regions.
PNO Norway	Problematic weaker performance compared to PY.	Current FC shows no improvements for 2nd HY.	Bottom-line results will not be met. Reorganization of sales team to be discussed.	Invites GM to board meeting for presentation of reorg plan for Norway.
PBN Benelux	Very strong performance, for ACT clearly above PY's average.	Trend expected to continue. This will lead to a 50% increase for avg. order entry compared to PY. New joiners in consulting show higher utilization than expected.	This could be a record year for Benelux. Costs under control and revenues expected to increase further.	Invite GM of Benelux to next board meeting for the presentation of how success could be replicated in other regions.
PCA Canada	Good performance for YTD.	1 KAM will leave in July and this will lead to weaker performance in 2nd HY.	Replacement of key resource will be challenging and therefore net result won't be achieved.	HR needs to be involved. Higher sales key players.

Summary Update

The Storyteller feature allows users to interactively explore and analyze data, generating meaningful narratives based on their findings.

Using the dashboard, users can easily input comments, assumptions, summaries, and planned actions. Once these inputs are made, the Unit4 FP&A software triggers an extension kit flow, securely sending the data to a ringfenced GENAI service.

Summary Update

Business Update from Legal Entities/Austria: The COVID-19 pandemic has had a significant impact on revenues, resulting in a 14% decrease compared to the Base Case. As a result, the gross margin is expected to decrease by 3m. To reduce the reduction in sales, measures will be implemented, and the cost of sales will be reduced accordingly. However, the overall contribution margin cannot be achieved for the full year. The company will hold a board meeting to discuss the situation and meet with the sales team to reduce the impact of COVID-19 in Austria. The performance so far is in line with last year, and monthly sales are expected to increase due to additional account managers. This will lead to an almost 20% increase in the average monthly bookings compared to the previous year. The net profit for France is expected to be on budget, with higher sales but also higher HR costs from more expensive sales managers. The board will discuss if the same success can be replicated in other regions. Germany: The company is experiencing a negative trend since the average sales are lower than in the previous year. From the collective agreement, a very high salary increase of 10%+ is expected, which will have an impact on the net result. Due to higher salaries, the net result target won't be achieved. The company will check the pipeline and marketing activities to further increase monthly order entry. England: The company has had solid performance for the year-to-date, with revenues and costs under control and performance as in the budget. Due to new account managers, an improvement in the second half of the year is expected. Given the positive outlook for YTG, it can be expected that England will outperform the targets. The company will focus on the enablement of new account managers. France: The company has had solid performance so far, with a positive trend compared to the previous year due to new sales enablement. The same costs as in the budget are expected, and higher efficiency of the sales team will lead to more bookings than in the budget. A higher net profit is expected due to constant HR costs and higher efficiency. The board will discuss if the Swedish enablement could be relevant for other regions. Norway: The company's performance has been weaker compared to the previous year. The bottom-line results will not be met, and a reorganization of the sales team will be discussed. The company will invite the GM to the board meeting for the presentation of the reorg plan for Norway. Sweden: The company has had a very strong performance, with ACT clearly above the previous year's average. The trend is expected to continue, leading to a 50% increase in the average order entry compared to the previous year. This could be a record year for Benelux, with costs under control and revenues expected to increase further. The company will invite the GM of Benelux to the next board meeting to present how success could be replicated in other regions. Canada: The company has had good performance for the year-to-date, but one KAM will leave in July, leading to weaker performance in the second half of the year. The replacement of the key resource will be challenging, and therefore, the net result won't be achieved. HR needs to be involved, and higher sales are expected to be key players.

This service swiftly processes and summarizes the comments, actions, and recommendations from organizational stakeholders. The entire process—including receiving the summarized response back — taking as little as 10 seconds.

UNIT4 FP&A 0.1 Solutions (new) 0.5 Best of Reporting ... 0.6 Dashboards (new) QBR Summary

Quarterly Business Review Summary

Austria

- YTD: Covid continues to substantially affect revenues (-14%) compared to the Base Case.
- YTG: COS will decrease in line with revenues, however, a decrease in gross margin of 3m is expected.
- Full Year: Overall contribution margin cannot be achieved for the full year due to a decrease in sales in general in Austria. Measures to reduce the reduction in sales will be implemented. COS will be reduced accordingly.
- Actions:
 - Agenda point for board meeting.
 - Meeting with sales team to reduce the impact from COVID.

France

- YTD: Performance so far in line with last year.
- YTG: Monthly sales expected to increase due to additional account managers. This will lead to an almost 20% increase of the avg. monthly bookings compared to PY.
- Full Year: Net profit expected above BUD target. Higher sales but also higher HR costs from more expensive sales managers.
- Actions: Discussion in board meeting if the same success can be replicated in other regions.

Germany

- YTD: Negative trend since avg sales are lower than in PY. R03 constant in YoY comparison.
- YTG: From collective agreement, a very high salary increase of 10%+ is to be expected. FC was adjusted accordingly. Higher HR costs will have an impact on the net result.
- Full Year: Due to higher salaries, net result target won't be achieved.
- Actions: Check pipeline and marketing activities to further increase monthly order entry.

England

- YTD: Solid performance for YTD. Revenues and cost under control and performance as in BUD.
- YTG: Due to new account managers, improvement in 2nd HY expected.
- Full Year: Given the positive outlook for YTG, it can be expected that England will outperform the targets.
- Actions: Close monitoring of performance of new account managers.

Sweden

- YTD: Solid performance so far. Positive trend compared to PY due to new sales enablement.
- YTG: Same costs as in BUD, higher efficiency of sales team will lead to more bookings than in BUD.
- Full Year: Higher net profit expected due to constant HR costs and higher efficiency.
- Actions: Board Discussion if Swedish enablement could be relevant also for other regions.

Norway

- YTD: Problematic weaker performance compared to PY.
- YTG: Current FC shows no improvements for 2nd HY.
- Full Year: Bottom-line results will not be met. Reorganization of sales team to be discussed.
- Actions: Invite GM to board meeting for presentation of reorg plan for Norway.

Benelux

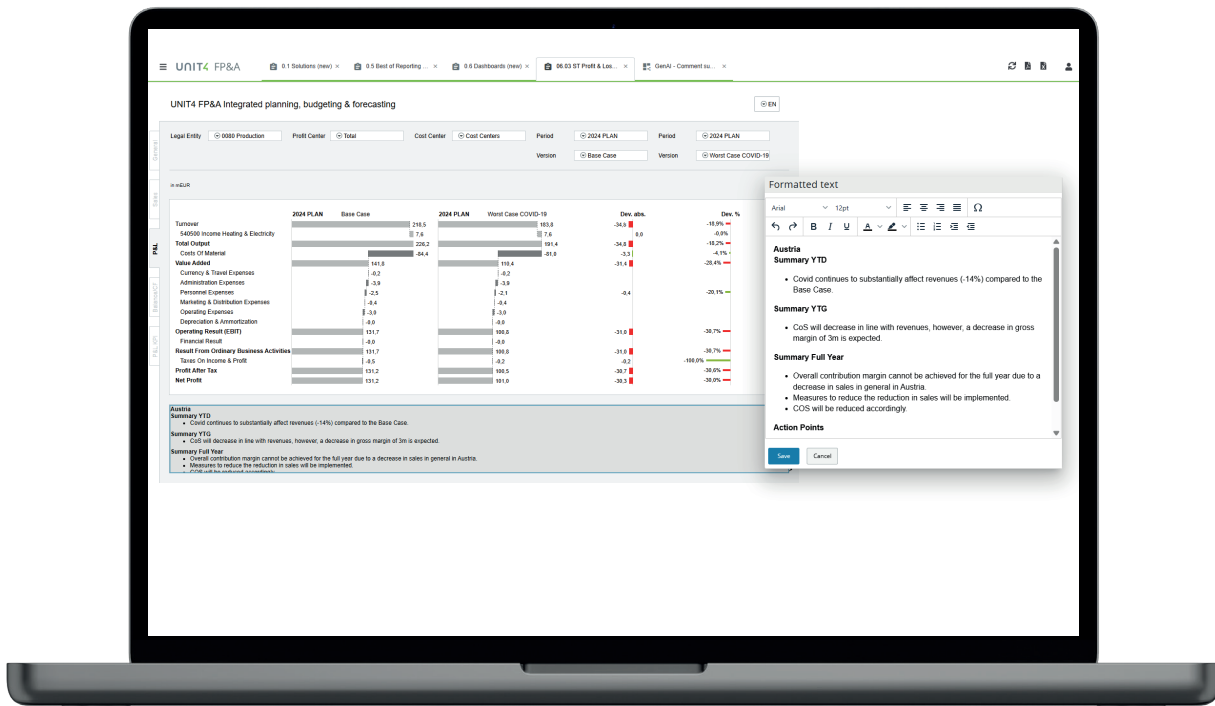
- YTD: Very strong performance for ACT clearly above PY's average.
- YTG: Trend expected to continue. This will lead to a 50% increase for avg. order entry compared to PY. New joiners in consulting show higher utilization than expected.

GENAI automatically applies conditional formatting to create a polished summary report. This report can be easily accessed and reviewed directly within Unit4 FP&A or shared with finance teams and other stakeholders through the system.

The suggested response can also be viewed alongside detailed FP&A data, reports, and recommended actions, providing a complete and actionable view of the insights.

“Predictive technologies, and AI in general, have tremendous potential to take performance management solutions to the next level: faster, easier and more accurate plans and forecasts.”

Global CPM trends and Priorities Report 2025
 BARC and BPM Partners

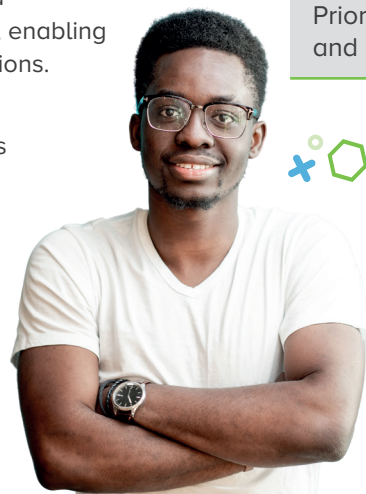


In summary

Unit4 is harnessing AI technology to transform data visualization and storytelling within FP&A . By seamlessly compiling user notes and comments, our AI-powered FP&A tools and smart assistance streamline tasks for the Office of the CFO and Finance teams, and increases the value that nonfinancial staff can gain from reporting.

This innovative approach enhances financial reporting and operational planning through advanced data visualization, enabling users to quickly spot trends and make well-informed decisions.

By aggregating and summarizing input from FP&A system users, the solution delivers meaningful context and insights into performance and trends. This not only strengthens decision-making but also frees up time for strategic recommendations and fosters greater collaboration across functions.



“More than 50% of companies plan to leverage AI and machine learning in planning and forecasting”
 Global CPM trends and Priorities Report 2025 – BARC and BPM Partners