

A smiling man in a blue suit is sitting at a desk, holding a pen. He is looking towards the camera with a friendly expression. The background is a bright, out-of-focus office setting with windows.


alteryx

# 5 Use Cases to Help FP&A Professionals Take Back Their Time

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Explore [five common FP&A processes](#) that can be streamlined to help you save time, increase accuracy, and make better strategic decisions.



The background of the slide features a dark blue gradient with a faint, semi-transparent financial chart. The chart includes candlestick patterns in green and red, and several overlapping line graphs in light green and yellow. The overall aesthetic is professional and data-oriented.

Manual FP&A processes aren't just a time suck, but they can also dull your competitive edge.

The time companies lose on manual processes could mean they're missing out on insights, creating reports based on outdated data, or lacking accuracy in their forecasts. Step up your game and explore five common FP&A processes that can be streamlined to help you save time, increase accuracy, and make better strategic decisions.



## USE CASE

# #1 Reconciliation from Systems

**600 hours/year**  
saved on pricing  
validations

## Reconciliation from Systems

System reconciliation compares two sets of records to make sure that figures are correct and match. As part of the FP&A function, it's important to ensure that data from multiple systems reconcile correctly and that the data in these systems are correct in the first place.

### COMMON ISSUES:

- Rigid structures and applications might be in place for consolidating and reconciling data from financial systems, making it difficult to fit the needs of various departments
- End users can't re-engineer processes — they can only manage reports and business workflows but not data prep, calculations, or structure maintenance
- Processes usually only work with out-of-the-box systems

### ALTERYX SOLUTION

Reconcile data, such as from assets and liabilities, using a standardized and automated process to get in front of issues faster and have more time following up on identified outliers.

### CUSTOMER SUCCESS

A health and wealth solutions and benefit administrator improved the accuracy of pricing validations through automation while speeding up delivery times and saving 600 hours/year.

[READ THEIR STORY](#)





USE CASE

## #2 Automation of Management Reporting

50M data rows run  
through in 5 minutes

### Automation of Management Reporting

Some organizations are obligated to produce management reporting to help leaders see the factors driving the business, including KPIs like profit and loss by class, department, job, or team. These reports can help executives gain insight into certain parts of the business and make strategic decisions.

#### COMMON ISSUES:

- If leaders don't receive reports at regular intervals, they might miss out on insights that help the organization grow or prevent costly mistakes
- Consolidating data from various business segments, especially in different locations, is complex
- The way formulae are calculated for key KPIs needs to be clearly communicated so that leaders can understand the associated risks to make informed decisions

#### ALTERYX SOLUTION

Create a fully integrated process for connecting to data sources, prepping and transforming data, and reporting. Get even more accurate reports faster.

#### CUSTOMER SUCCESS

A conglomerate corporation enhanced their performance reporting by updating their whole data set of 50M+ data rows every 3 hours, rather than once a week.

[READ THEIR STORY](#)



USE CASE

# #3 Demand Planning/ Forecasting

75 hours/day saved  
across departments

## Demand Planning/Forecasting

Demand planning helps companies produce and deliver their products more efficiently by forecasting the demand for a product or service. The process involves data collection, statistical analysis of metrics, modeling to predict demand, scenario planning to account for uncertainty, and collaboration with multiple stakeholders, such as suppliers and manufacturers.

### COMMON ISSUES:

- Data is required from all parts of the organization, but it's often difficult to get the right data and get it on time
- Accessing and protecting data, especially when a lot of the data is maintained in spreadsheets and hundreds of individuals access it
- Getting data in different formats and then needing to cleanse and merge it is time consuming and a huge manual effort

### ALTERYX SOLUTION

Connect data sources, prepare data, and apply advanced analytics automatically so you can forecast demand more accurately to decide the best product mix and production quantities.

### CUSTOMER SUCCESS

A semiconductor company reduced its effort of preparing, publishing, and distributing reports to less than 1% of what it was before to save 75 hours/day across departments.

[READ THEIR STORY](#)



USE CASE

# #4 Customer Segmentation

275% lift in  
campaign revenue

## Customer Segmentation

It's important for companies to analyze customer behavior and change strategies based on shifting trends. They can do this by segmenting customers into various categories, such as revenue contribution or strategic fit, and creating a different plan for each segment.

### COMMON ISSUES:

- Data is often held in ERP systems and requires a lot of cleansing before it can be used for reporting
- Most segmentation reporting is based on guesswork, intuition, and instinct as opposed to accurate representation and data investigation

### ALTERYX SOLUTION

Turn patterns in customer consumption and behavior into data-driven segmentation models to help you make decisions about products, promotions, and go-to-market strategies.

### CUSTOMER SUCCESS

A fashion company used customer segmentation and a pricing probability model in their holiday marketing campaign and saw a 275% lift in campaign revenue compared to the previous year's campaign.

[READ THEIR STORY](#)



USE CASE

# #5 Real Estate Planning

50% reduction  
in monthly  
manual process

## Real Estate Planning

When it comes to real estate investments, FP&A departments should be maintaining data and reports to understand the best location for new real estate and how these properties will impact financial statements from an income and expenses point of view.

### COMMON ISSUES:

- Choosing a location for an office, store, or other property can be a complex process with long-term consequences
- Companies may need to leverage third-party data sets with data on location, potential consumers, competitors, etc.
- Site and location analysis can be elaborate and involve sales forecasting, cannibalization models, analog models, site feature scores, etc.

### ALTERYX SOLUTION

Enhance your real estate planning with built-in spatial and address tools and location and business data sets that allow you to unlock key location insights.

### CUSTOMER SUCCESS

A commercial real estate services firm created an automated data pipeline that reduced manual processes by 50% to identify trends and potential investment properties.

[READ THEIR STORY](#)



# alteryx

## Get Started with Alteryx

Alteryx, the Analytics Automation company, is focused on enabling every person to transform data into a breakthrough. See how your FP&A department can use analytics automation to take back their time and maximize efficiency and performance.

[Watch the on-demand webinar](#) to explore how to shift from time-consuming tasks into high value-add insights.

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