

Modern **Buyer's Guide** to Strategic Finance Software



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Introduction

The financial software market is finally experiencing its renaissance. Gone are the days of ERP systems as de facto data repositories, Excel as the only data manipulation tool, and PowerPoint as the medium for discussion. Now, the finance function is gaining access to tools that address the core challenges of supporting a modern business:



Centralizing data from
an ever-growing
number of SaaS tools
across the business



Bridging the gap from
raw data to actionable,
strategic insights that
drive growth



Collaborating across
departments in an
increasingly remote
workplace

Legacy platforms like Anaplan, Workday Adaptive Planning, and Planful got their enterprise target market part of the way there with strong data centralization capabilities and some automation. But they haven't been able to keep up with the growing pressures of accelerated decision cycles across departments.

For an enterprise with 1,000+ employees, massive data volume, and more granular financial model assumptions, a tool like Adaptive Planning may still be the best option. But a new generation of finance software has emerged to build upon the early vision of those legacy platforms and bring strategic finance services to smaller segments.

While many solutions exist with varying degrees of capabilities, only Mosaic directly addresses all the needs of SMB and mid-market customers. This buyer’s guide provides a framework to assess different vendors offering strategic finance and FP&A solutions.¹ We review a small, select group of vendors here, but you can use the six performance criteria to evaluate any vendor.

[Download](#) our vendor assessment template to find the right finance software for your business. Create a side-by-side comparison of the systems you want to review.

Get the template

Vendor Assessment Template	
Financial Analysis	5
Planning & Modeling	4.9
Workflow Automation	4.8
Real-Time Reporting	4.8
Security	5
Total Score	4.9

¹ Disclaimer: Information contained in this document is based on publicly available documentation about each of the software vendors reviewed as of August 20, 2021. Features may be referred to differently by different vendors, which can cloud direct comparisons. Products and features are continually being updated and we will make an effort to update the information in this document to reflect those changes. Please contact marketing@mosaic.tech for any suggested corrections.

From FP&A to Strategic Finance

Strategic finance is a rapidly evolving category with growing adoption by teams looking to centralize data from different departments, automate traditionally manual, spreadsheet-based workflows, and become more forward-looking advisors to the business. While these tools often fall under the traditional umbrella of “FP&A software,” there’s still some confusion about how to define the emerging strategic finance category as it extends beyond the enterprise segment.

Until fairly recently, FP&A software for small and midsize companies was generally non-existent or otherwise unaffordable and overly complex. Instead, these companies relied on a mix of enterprise-grade software, business intelligence, and separate point solutions to fill the main roles of a strategic finance tool:

**REAL-TIME
FINANCIAL ANALYSIS**

**AGILE PLANNING
AND FORECASTING**

**ON-DEMAND
REPORTING**

Now, as the strategic finance category comes into focus, companies like Mosaic are approaching the space holistically, pulling all processes for successful planning and analysis into one platform.

Different players in the ecosystem are solving problems for customers from different angles. Some, like Jirav and Planful, position themselves as “continuous planning software.” Others, like Cube, offer a spreadsheet enhancement with additional automation features. And others, such as Mosaic, shift away from Excel to offer dynamic flash reporting tools and grids.

This guide gives you a framework for evaluating all of these different tools by laying out **six key performance criteria**:



But first, we need to properly define the category and the specific problems it's trying to solve.

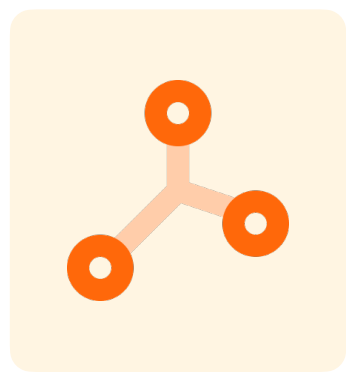
| What is Strategic Finance?

Strategic finance is a real-time, open access, cross-company framework that turns the historically complex and siloed finance function into a clear, connected, and collaborative department—one that's able to focus its time and expertise on assessing growth opportunities rather than getting stuck in a cycle of backward-looking reporting.

Finance teams that embrace this mindset are able to:

- ◆ Transform the overarching company strategy into a long-range plan with dynamic models that accurately capture annual operating and capital budgets.
- ◆ Drive strategic analysis to understand profitability, financial and non-financial performance, and set ongoing targets for key performance indicators (KPIs).
- ◆ Collaborate with other departments to build assumptions, analyze indicators, and drive actions that better align models and performance with strategic company goals.

However, there are a few challenges that prevent finance teams from taking on these roles.



Siloed data and teams

An explosion of new point solutions has created pockets of information spread across every team in the organization. Finance has to stitch this all back together to see the entire picture of the business. This process often delays decision-making due to labor-intensive workflows for consolidating financial and non-financial information from disparate source systems into formats that investors and the rest of the business can easily digest.



Backward-looking reporting

Disconnected data sources and definitions lead to error-prone analysis and confusion around the validity of information. The long process of unraveling cross-functional data and updating complex, spreadsheet-based models means finance is constantly behind the eight ball. Instead of adding forward-looking, strategic value, finance gets stuck creating backward-looking reports that quickly go stale.



Real-time requirements

Real-time data has become the norm across the business. Marketing, sales, and HR have powerful tools that provide up-to-the-moment insights into KPIs. The business expects everyone to move at that pace, but finance is often left behind. As that pressure builds, it becomes increasingly difficult for finance to wrangle data from tools, clean and consolidate it, and use it for strategic planning and analysis.

The right strategic finance software eliminates these challenges and turns your team into the forward-looking, strategic business partner a modern organization needs.

1.

Strategic Finance Software Capabilities

The category of strategic finance includes:

- ◆ Real-time financial analysis
- ◆ Agile planning and forecasting
- ◆ Rapidly deployable integrations

Alongside the workflows that support those products:

- ◆ Collaborative budgeting
- ◆ Automated metric calculations
- ◆ Built-in consolidations
- ◆ On-demand reporting



	SMALL AND MID-MARKET			ENTERPRISE		
PLATFORM FEATURES ²						
Native Integrations						
User Control and Permissions						
Real-Time Analytics						
On-Demand Metrics						
Agile Planning						
Predictive Forecasting						
Extreme Automation						
Consolidations						
Real-Time Reporting						

² Selection includes some of the more established software as new entrants are on the rise

A true platform combines all of these tools, workflows, and capabilities into one software solution so finance teams can easily collect data, analyze the business, and work collaboratively with teams on planning. But analyzing the market starts with splitting SMB and mid-market solutions from enterprise-focused ones.

| SMB and Mid-Market Strategic Finance Platforms

Considered the third generation of FP&A tools, emerging solutions seek to address the end-to-end requirements of a modern strategic finance function—extracting point solution data and transforming it into meaningful building blocks for real-time analysis and planning.



Mosaic

Designed to scale with small and midsize businesses up to 1,000 employees. Mosaic is a Strategic Finance Platform that delivers next-gen FP&A functionality, integrating key source tools for real-time analysis and agile forecasting in one place.



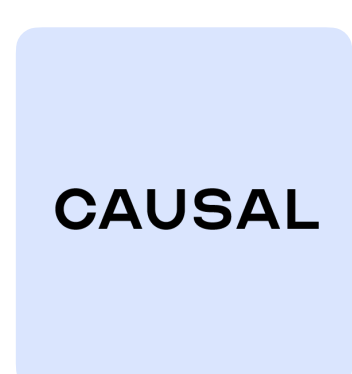
Jirav

A solid lightweight planning and reporting tool that helps finance teams create plans and financial statements based on ERP data and limited HRIS data. Jirav is helpful for teams that rely heavily on Excel as an intermediary tool for data uploads vs. a robust set of integrations. It provides a solid, yet partial, view of the business and still requires some legwork for basic financial analysis.



Early Startups to Note

Vareto and Causal have just started the journey of bringing a strategic finance solution to market. Their offers vary between full platforms and planning-specific components. They're worth mentioning here, but it's too early to categorize them properly.



Enterprise FP&A Platforms

These platforms have robust feature sets that can support a variety of industries and business models. However, those benefits come with extensive implementation time, long onboarding cycles, and incremental costs for setup and support.

The logo for Adaptive Insights, featuring the word "Adaptive" in a bold, sans-serif font above the word "Insights" in a smaller, lighter font.The logo for Anaplan, featuring the word "Anaplan" in a bold, sans-serif font.

Adaptive Planning and Anaplan

These two platforms have been around since the early 2000s when they aimed to centralize key workflows that ERP systems originally intended to deliver for FP&A teams. They're considered Gen 2 FP&A tools with robust capabilities but a lack of dynamic interfaces and workflows that could increase time to value. They're designed and priced specifically for enterprise users who are ok with the high costs of technical support and maintenance.

Notable mentions: Prophix, Vena, Pigment

Planning and Reporting-Focused Platforms

These solutions intend to keep finance in its comfort zone by leveraging Excel-like interfaces while delivering some improvements to workflows and automation. This means teams get more customization at the cost of speed, accuracy, and efficiency.



Cube

Finance software that combines limited cloud data management with an integrated spreadsheet interface to improve forecasting workflows. It helps automate calculations of models and forecasts once users have performed extensive manual setup. Limited visualization.

The logo for Planful, consisting of a light blue square with the word "planful" in lowercase black text.

Planful

This platform supports finance teams that straddle the line between medium-size and enterprise companies and are ok contracting for custom connections with other enterprise tools to help with planning and analysis. While it offers solid financial reporting, and headcount planning, it lacks automation and self-service functionality.

Notable mention: OnPlan

| Benefits of a Strategic Finance Platform

A complete Strategic Finance Platform provides the clarity and convenience of consistent workflows and real-time performance in one place while unlocking the power to move faster as an organization. When evaluating the market, finance teams should expect next-gen solutions to:

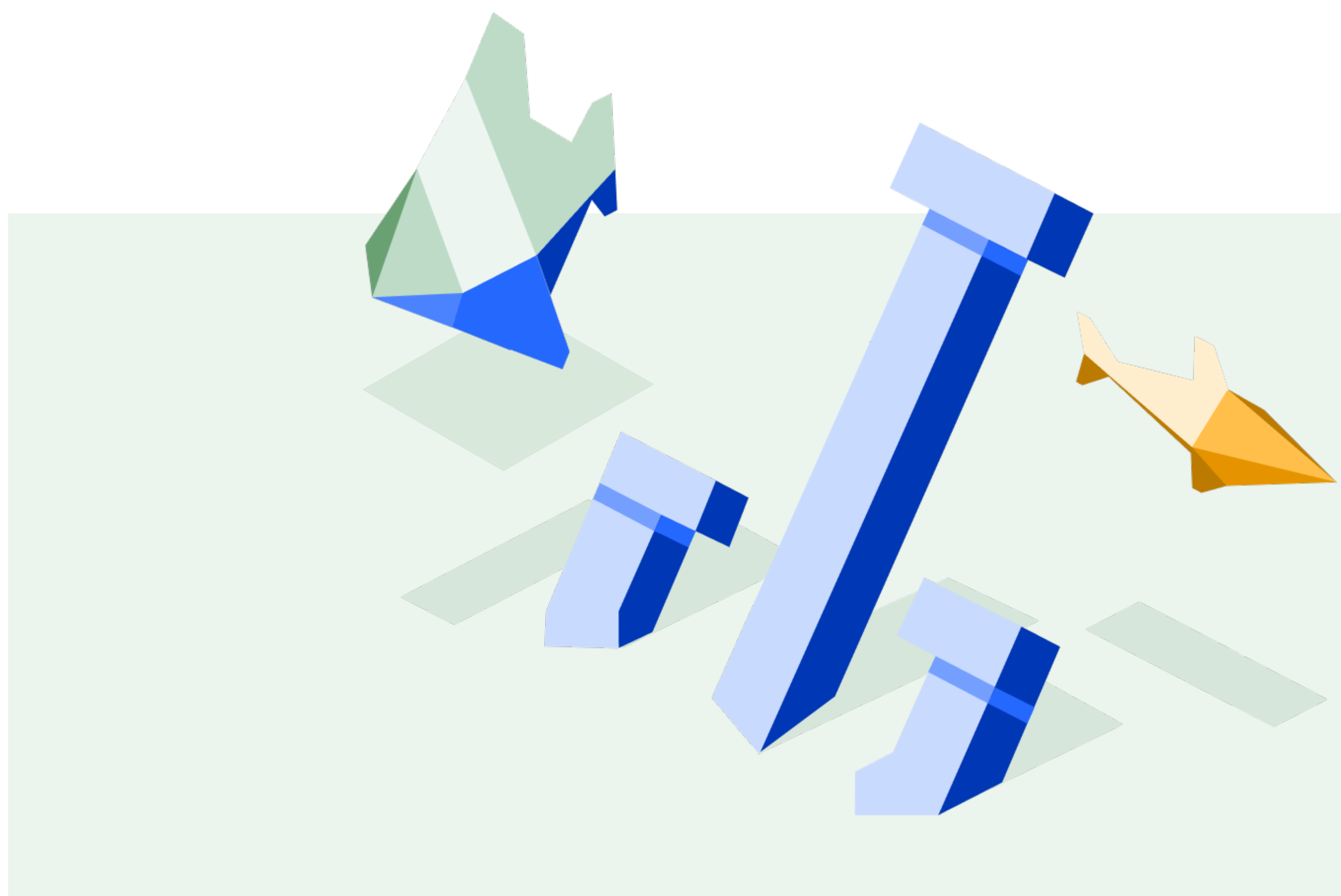
- ◆ Consolidate and structure data from all tools without finance having to manually pull it all from various sources.
- ◆ Provide the real-time insights of a business intelligence tool without requiring a technical skill set.
- ◆ Automate time-consuming manual workflows like metric calculations, budget vs. actuals analysis, and rolling forward actuals.
- ◆ Start delivering real value in minutes or hours, not after months or years of implementation.
- ◆ Connect internal and external stakeholders for collaborative planning and budgeting by giving everyone a unified view of the business with easy-to-understand visuals.
- ◆ Eliminate version control issues and the need for manual, cross-platform reconciliations.
- ◆ Support the CFO in acting as a true strategic partner to the CEO by freeing up more time to spend on strategic analysis and profit-based guidance.

Depth of Core FP&A Features

Finance teams shouldn't have to sacrifice the functionality of best-of-breed point solutions when considering a platform solution. At a minimum, a Strategic Finance Platform should have parity with those point solutions and the existing tools it seeks to replace. The best-case scenario is when the features drive greater efficiency while surpassing the capabilities of best-of-breed tools.

To evaluate which strategic finance software will deliver that best-case scenario for you, we are breaking their feature sets down according to the financial analysis and planning workflows that need modernizing.

Some of the features that differ among the software vendors in this space are worth itemizing.



Interactive Analysis

Manipulating data, drilling into detailed transactions, and running multi-dimensional analysis without switching tabs or windows.

Dynamic Dashboarding

Using shortcuts, adding and removing metrics, cycling between trended graphs/charts/tables, layering in labels, resizing visuals, sharing notes and messages without highly technical resources.

Out-of-the-Box Metrics

Automating simple and complex financial and non-financial metric calculations to tell a story with pre-populated insights based on industry best practices.

Integrated Headcount and Sales Planning

Ingesting real-time CRM and HRIS data to help with sales forecasting and drive more collaborative workforce planning.

Predictive Forecasting

Using real-time historical data, pre-set forecasts methods, or top-down assumptions to create forward-looking forecasts without reverting back to previous spreadsheet data.

Variance Analysis


Seeing budget vs. actuals or FvA live without manually rolling models forward in spreadsheets or manual refresh interventions.

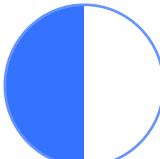
Reporting Templates


Access to a library of best-in-class metrics, dept. dashboards, executive reports, three-way financial statements, and analysis blueprints.



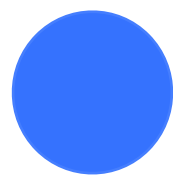
	SMALL AND MID-MARKET			ENTERPRISE		
FINANCIAL ANALYSIS				planful	Adaptive Insights	A.naplan
Out-of-the-Box SaaS Metrics						
Financial and Non-Financial Analysis						
Interactive Analytics						
Dynamic Dashboarding						
Transaction Level Drill down						
Automated 3-Way Financial Statements						
Custom Financial Report Builder	coming soon					
Quality of Data Visuals						
Pre-Loaded Reporting Templates						

 Available out of the box or simple to do

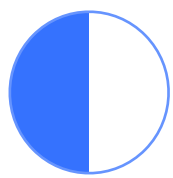
 Partial; some things are custom built, partial workflows are automated, or can be attained after some manual onboarding and setup

 Not available

	SMALL AND MID-MARKET			ENTERPRISE		
MODELING				planful	Adaptive Insights	Anaplan
Pre-Loaded Baseline Model						
Driver Based Forecasting						
Pre-Configured Forecast Methods						
Live View of Budget and Forecast vs. Actuals						
Custom Data Modeling	coming soon					
Integrated Sales & Headcount Planning						
Multiple Scenario Planning						
Automatic Model Reconciliation						
Rolling Forecasts						
10-Year Planning Window						



Available out of the
box or simple to do



Partial; some things are custom built, partial
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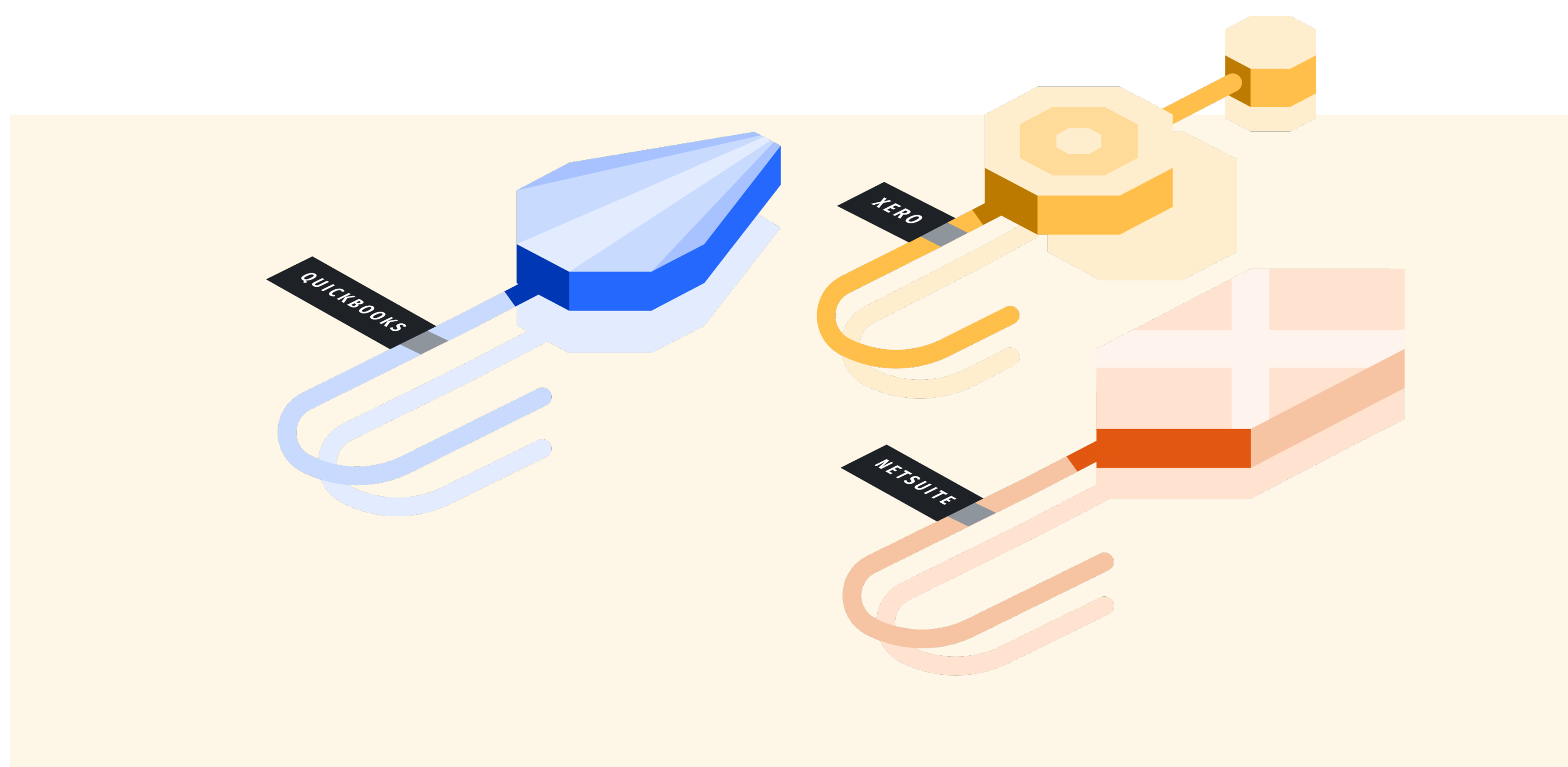


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Integrations

Answering simple questions on the current state of your business can be surprisingly painful. It requires you to piece together data from a dozen or more tools spread across sales, marketing, HR, and your own accounting functions. Uploading data from Excel and Sheets is a start—but modern platforms have evolved to connect with department tools via plug-and-play integrations.

First and foremost, strategic finance software has to integrate with your ERP. You should look for tools that integrate natively, creating direct and automatic connections to your general ledger to eliminate any manual data entry. An example is Mosaic's native integration with all three major ERP systems (QuickBooks, Xero, and NetSuite) vs. a more labor-intensive connector that Planful may offer.

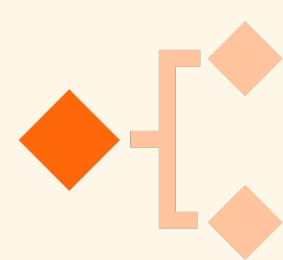


Beyond ERP connections, some players in the strategic finance ecosystem also integrate with CRM and billing systems to help connect data points and provide access to more complex metrics. For example, companies may have different ways of calculating ARR, which requires annualized contract data from the CRM and monthly recurring payment information from billing systems.

The top-tier systems go a step further to integrate with HRIS systems. This automates workforce data flow to support strategic headcount planning in one central platform.

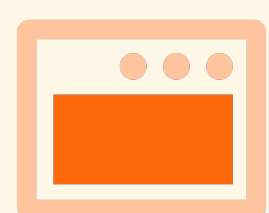
A few features that differ among the software vendors in this space are worth itemizing.

NATIVE API INTEGRATIONS



Accessing real-time source system data at all times without the need of a 3rd party data repository. Most platforms require connectors and ongoing maintenance.

MULTI-SUBSIDIARY CONSOLIDATIONS

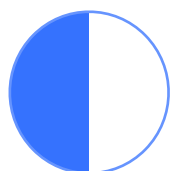


Allows finance teams to connect multiple ERP instances to automatically consolidate end-to-end financial data from a group of companies.

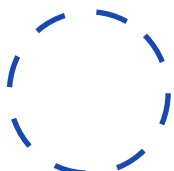
	SMALL AND MID-MARKET			ENTERPRISE		
INTEGRATIONS				planful		
Native Integration with QuickBooks, Xero, and NetSuite						
Native Integration with CRM, HRIS, and Billing Systems						
Custom Implementation Internal Tools						
Integration with Excel and Google Sheets						
Excel and Sheets Data Upload Download						
Multi-Subsidiary Consolidation for QuickBooks or Xero						



Available out of the box or simple to do



Partial; some things are custom built, partial workflows are automated, or can be attained after some manual onboarding and setup



Not available

Workflow Automation

The required workflows and responsibilities for modern finance leaders have expanded far beyond traditional financial skillsets. To add strategic value, you have to be part data analyst, part systems architect, part planner, and part economist. A lot of roles to juggle just to get data into a viable starting point. Workflow automation is crucial to any finance leader's ability to wear all of these different hats and have a strategic impact on their business.

Your strategic finance solution should move you away from the tedious work of downloading, cleaning, and consolidating data so you can focus more on manipulating the numbers, sharing them across the organization, and highlighting strategic insights that drive collaborative action.

As you evaluate potential solutions, consider how many different workflows they automate and how much time those features could save you on a monthly basis. Some of the most important workflow automations to look out for include: Intelligent ETL, pre-loaded metrics, built-in currency translations, and real-time reports & financial statements.

**Intelligent
ETL**

Executes automatic data mapping to help streamline integration from ERP, CRM, HRIS and billing systems including custom fields.

**Pre-Loaded
Metrics**

Critical KPI's like ARR, runway, SaaS quick ratio, customer cohorts, and sales pipeline can be accessed on-demand without manual calculations.











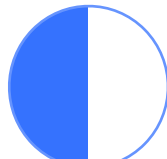
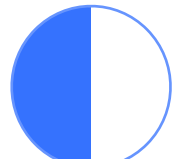




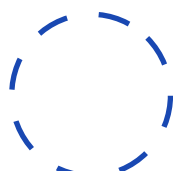


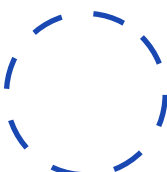
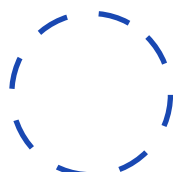








**Built-In
Currency
Translations**

Uses software to run real-time currency calculations plus creates cumulative translation adjustment accounts to hold gain/loss differences from fluctuations.

**Real-Time
Reports and
Financial
Statements**

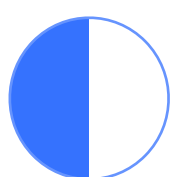
Exec dashboards, Income Statement, Balance Sheet, and Cash Flow are always up to date without manual intervention. Forecast overlays can be applied to quickly view future expectations.



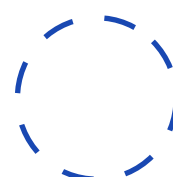
	SMALL AND MID-MARKET			ENTERPRISE		
AUTOMATION				planful	Adaptive Insights	Anaplan
Intelligent ETL						
Pre-Loaded Metrics						
Rolling Forecast						
On-Demand Variance Analysis						
Automated Consolidations						
Built-In Currency, Translations, and Eliminations						
Real-Time Reports and Financial Statements						



Available out of the box or simple to do



Partial; some things are custom built, partial workflows are automated, or can be attained after some manual onboarding and setup



Not available

Scalability and Customization

Scalable solutions that offer both out-of-the-box functionality, as well as some degree of customization, are key to any company's growth. Finance often feels this pain in the transition from QuickBooks to NetSuite—a migration that can cause nightmares due to the amount of time, effort, and risk involved in making the switch. The last thing you want is to go through the process of implementing a strategic finance solution only to outgrow it in a few months or a year.

When evaluating potential solutions, consider how they balance out-of-the-box functionality with customizability. For example, automated financial metrics may be sufficient to a point, but you'll also want a custom metric builder so you can craft the calculations needed to properly measure your company's progress toward goals. And while it's great to automate your three financial statements, you'll also want the ability to build custom reports to provide the right level of visibility to different stakeholders.

Vendors in the strategic finance space offer varying levels of scalability and customization depending on the market segments they cater to. A tool like Jirav serves small startups, supporting less complex needs with out-of-the-box features but falls short for companies as they grow in size and complexity.

Anaplan, Adaptive, and Planful, by contrast, specifically target large enterprise customers. They offer fully customizable features and support complex org structures. Their price tags and capabilities don't translate well to smaller companies. Until you've reached the enterprise level, they're likely over-engineered options for your needs and will have hefty maintenance costs.

Mosaic aims to strike a balance between out-of-the-box and customizable features to support the needs of companies from seed stage through IPO.

Self-Service Integrations

Enables finance teams to add and disconnect software via self-serve vs. relying on a team of infrastructure professionals.

Roles and Permissions

Gives full control over who is a user and what that user can see down to the account-level information (e.g. employee salaries).

Custom Metric Builder

Enables teams to build the kpi's that are most relevant to their business using simple formula builders which can be saved and applied to any analysis and report.

Custom Financial Reports

Ability to create blended financial and non-financial reports to answer questions related to company health, efficiency, and investment timing.

Custom Forecasting

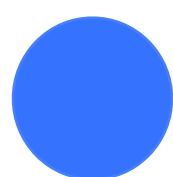
Unlocks end-to-end topline forecasting, custom balance sheet modeling, and dynamic headcount planning.

Unlimited Access

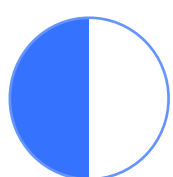
Provides unlimited use of features and users across product offerings to avoid unforeseen add-on costs.



	SMALL AND MID-MARKET			ENTERPRISE		
CONTROL				planful		
Self-Service Integrations						
Fast QB/Xero to NetSuite Integration						
Robust Roles and Permissions						
Custom Financial Reports	coming soon					
Custom Forecasting	coming soon					
Unlimited Access to Reports, Forecasts, and Scenario Modeling						



Available out of the box or simple to do



Partial; some things are custom built, partial workflows are automated, or can be attained after some manual onboarding and setup



Not available

Implementation, Onboarding, and Ease of Use

Intuitive design is the philosophical approach to modern software. And yet, this driving principle is often ignored in the finance software space. So many tools continue to model themselves after 40-year-old spreadsheet interfaces. They may get the job done, but they don't meet the consumer-grade design standards that other departments across the business enjoy.

When evaluating the market, consider the value of interfaces that offer dynamic, visually-optimized interfaces that can keep stakeholders outside of finance engaged. Colorful charts, graphs, trend indicators, and other visuals help pull people into finance's story, supporting the function's shift from backward-looking scorekeepers to forward-looking strategic partners.

New systems like Mosaic are designed around the idea of consumer-grade enterprise software, delivering significant functionality alongside modern user experiences. For example, Mosaic's one-click Metric Catalog populates ARR insights in seconds and gives anyone in the business the ability to visualize that data in graphs and charts without a technical background.

A strategic finance function doesn't just have a handle on the numbers—it is able to collaborate on the numbers with non-technical teams outside of finance. Implementing a platform they're willing to use themselves can help facilitate that. Some of the areas to consider when looking for this kind of platform include:

Setup Time

The gold standard should be no more than 30-60 days for middle-of-the-road complexity.

**IT Resources
Required**

Significantly reduces the need for additional human capital investment to avoid long implementation times and variable costs.

**User-Friendly
Interface**

Teams with little to no technical skill can easily navigate, access, and create insights with minimal training.

**Self-Service
System
Management**

Maintaining data integrity, data recency, and user controls requires low effort.

**Onboarding
Time**

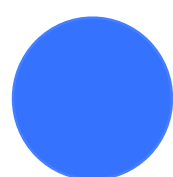
Teams can access core capabilities within hours and become proficient without learning an entirely new syntax or complex modeling languages.

**Dedicated
Support**

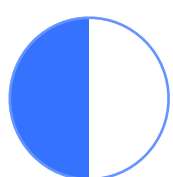
While most work is automated that doesn't mean teams don't need a little help here and there. Get direct access to customer support without callbacks or long wait times.



	SMALL AND MID-MARKET			ENTERPRISE		
AUTOMATION				planful	Adaptive Insights	A:naplan
Setup Time	30 days	30 days	unknown	3+ months	4+ months	6+ months
IT Resources Required						
White-Glove Onboarding						
Self-Service System Management						
User-Friendly Interface						
Dedicated Support			unknown			
Financial Advisory		unknown	unknown			



Available out of the box or simple to do



Partial; some things are custom built, partial workflows are automated, or can be attained after some manual onboarding and setup



Not available

Business Benefits and Additional Considerations

The biggest differentiators between Gen 2 and Gen 3 finance software are the level of automation and a stronger focus on collaboration. Your finance software shouldn't just be built for the finance team. If you want to be a strategic business partner, your software needs a lower barrier to entry so that every team can become more connected to the numbers.

Generally speaking, you want whatever tool you implement to unlock a few high-level business benefits. It should:

1.

Create a common language between finance and the rest of the business to facilitate communication and collaboration.

2.

Make business performance more transparent so finance doesn't become a black box in the organization.

3.

Scale alongside the business without requiring added costs for infrastructure upgrades.

But beyond these benefits and all of the categories covered throughout the guide, there are a few miscellaneous considerations teams should explore when assessing the strategic finance software market.

**Data
Management**

Try to avoid full-service data management that includes added costs for connectors, maintenance, and troubleshooting. Also, make sure the tool’s syntax can easily be deployed across the different functional areas within your finance team.

Collaboration

Make sure teams across the organization can access or at least consume the information generated from these powerful platforms. An added bonus is finding software that offers in-app notes or messaging, workflow checklists, audit trails and other collaboration tools to bring everyone on the journey together.

Security

This mainly applies to mid-size and enterprise companies that have to remain compliant with FASB and IFSB. But consider whether data is fully secured in a tool that’s SOC 1 and SOC 2 compliant.

**Pricing
Structure**

Look for vendors that offer all-inclusive, unlimited feature sets rather than usage-based pricing or add-on costs for support and implementation. Mosaic takes this approach to help customers avoid the typical hidden costs of software implementation.

User Reviews

			planful		
4.9	4.8	4.7	4.2	4.4	4.5

Source: G2

Bottom Line

The market for modern strategic finance software is just starting to heat up. And as is often the case, a rising tide will raise all boats. A variety of vendors are pushing each other to deliver new cloud functionality that will make life easier for FP&A pros—which traditionally hasn't been the case in the finance industry.

Regardless of which tool you think might fit best for your finance team, keep one main idea in mind. It's critical that any strategic finance solution delivers powerful functionality in the three main areas of FP&A—agile planning, real-time analysis, and plug-and-play integrations. If even one of those pillars isn't there, the whole concept of the platform disappears and workflows will start to break down quickly.

Mosaic is the first Strategic Finance Platform on a mission to transform FP&A into a forward-looking function by connecting all aspects of the financial ecosystem. As the rest of the space races to catch up, we suggest you check out the best of the bunch.



Get Your Strategic Finance Vendor Platform Checklist

To help streamline your evaluation process, we put together a spreadsheet that will help you build side-by-side comparisons of the Strategic Finance Platforms that interest you most. [Download the template](#) now so you can start weighing the pros and cons of different solutions and find the one that will serve your business best.

Get the template

Vendor Assessment Template	
Financial Analysis	5
Planning & Modeling	4.9
Workflow Automation	4.8
Real-Time Reporting	4.8
Security	5
Total Score	4.9





About Mosaic

Mosaic was founded in 2019 by three finance leaders who knew the office of the CFO needed an overhaul. Tasked with supporting business decisions for several companies in hyper-growth, they were frustrated by the slow speed, high complexity, and inefficiencies existing tools in the market offered. With this challenge in mind, they set out to build a platform that would address the technical challenges modern day finance and business teams face.

Today, Mosaic is deployed by some of the fastest-growing companies, helping them align, collaborate, and plan for the future.

To learn more, visit www.mosaic.tech and follow us on [LinkedIn](#) or join the conversation on [Twitter](#).