

Planning Guide for Power BI



Co-Authors

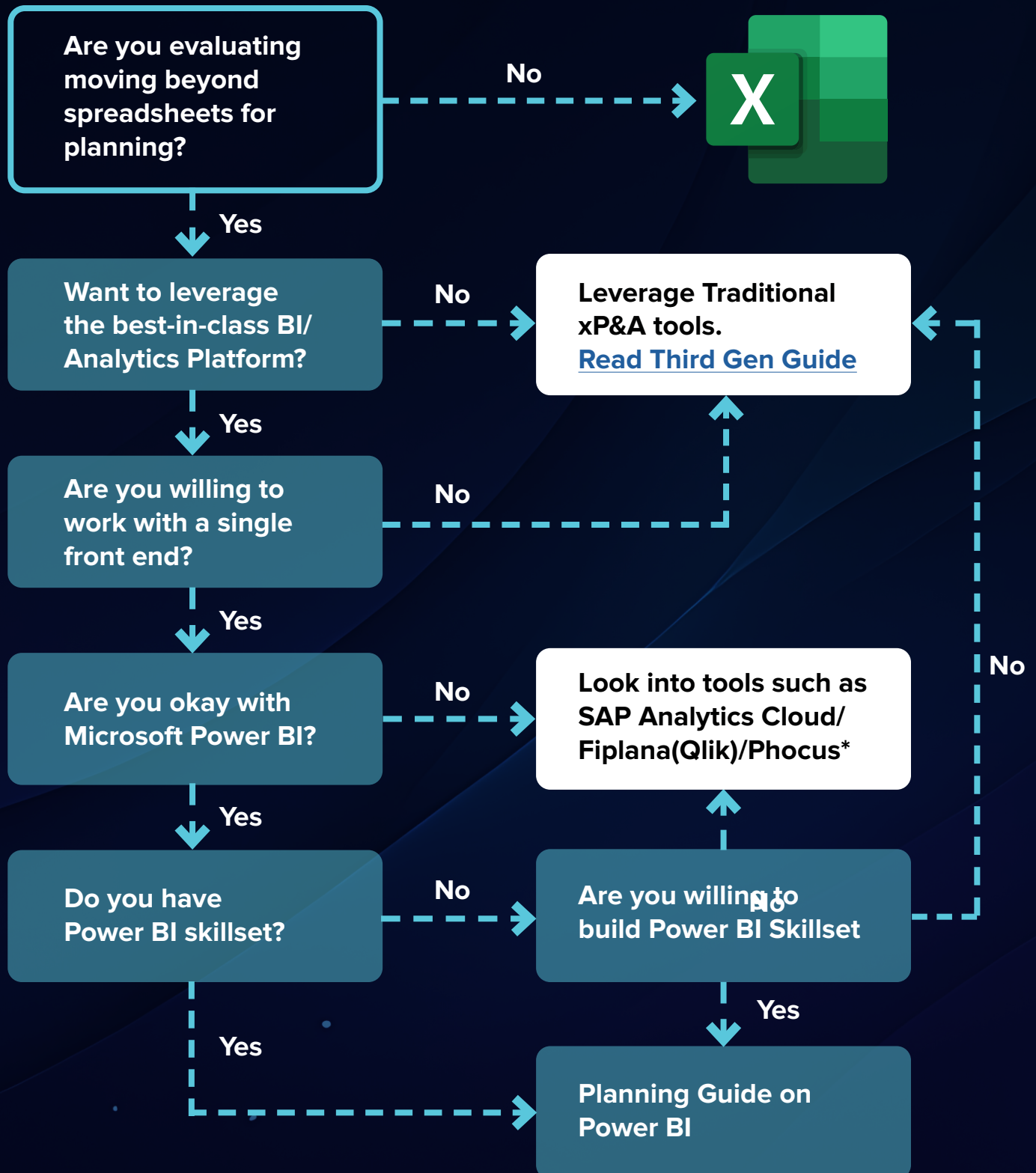
Paul Barnhurst



Khaled Chowdhury



IS THIS GUIDE FOR YOU?



Go to the end of the guide for a list of BI-enabled planning tools beyond Power BI.

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ABOUT THE AUTHORS

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CEO and founder
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Paul Barnhurst A.K.A “The FP&A Guy” is the CEO and founder of The FP&A Guy. He has over a decade of experience in finance and FP&A, working in travel, banking, SaaS, and more. He is recognized as a thought leader and influencer within the field of FP&A and CFOTech. He has met with over 100 CFOTech companies in the last two years, speaking to founders and senior leaders and participating in product demos. He hosts the popular podcasts FP&A Today, Future Finance and Financial Modeler’s Corner. He is an advisory board member at Born Capital, where he helps identify and grow the next big thing in CFOTech. He is a Microsoft Excel MPV and has earned his Financial Planning and Analysis Certificate (FPAC) from Association of Finance Professionals (AFP) and his Advanced Financial Modeler (AFM) from Financial Modeling Institute (FMI). He also provides training, consulting, and thought leadership for all things FP&A. Paul enjoys reading fiction, running, sports, and spending time outdoors with his family.



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Khaled Chowdhury

Principal: Analytics Transformation
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Khaled Chowdhury* is a visionary leader in Data and Finance. He has a track record of delivering organizational transformation and building world-class teams. Khaled specializes in unlocking value by empowering businesses with modern technologies. With a core focus on Digital Transformation, Automation, Strategic Planning, Forecasting, and Agile Cloud Platforms, he has helped numerous organizations achieve their goals.



Khaled’s passion for technology and business come together to create a lasting impact on organizations around the world.

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***Note:** For Full Transparency, Data Crafters has been an implementation partner of Lumel since September 2024. This happened after the survey and demos were completed. All write-ups in the guide were reviewed by both authors, in addition to a factual check by vendors to ensure fairness.

INTRODUCTION

In recent years, we have seen an explosion of new planning solutions in the marketplace. This explosion resulted in Anders Liu-Lindberg, Wouter Born, and Paul Barnhurst creating the first-ever 3rd Generation FP&A Tools Market Guide. This market guide was groundbreaking for its focus on newer tools that were hyper-focused on user-centric design, self-service capabilities, native ERP integration, and rapid implementation. Today, it is necessary to introduce another guide, this time focused on the growing convergence of business intelligence and financial planning tools. We are excited to introduce you to the first-ever Planning in Power BI Market Guide.

Much like what Board did 10 years ago, today, we are seeing many tools combine planning and business intelligence into one integrated platform. With this increase in BI-enabled planning tools, my author, Khaled Chowdhury, and I realized a guide dedicated to planning within BI tools was necessary. At the forefront of this convergence of platforms is Microsoft's Power BI, with many add-on solutions combining the strengths of the Microsoft Tech Stack and Power BI with integrated writeback and planning capabilities to create an integrated platform.

WHY WE FOCUSED THE GUIDE PRIMARILY ON POWER BI-ENABLED PLANNING SOLUTIONS

As we began researching BI-enabled planning solutions, we concluded that focusing the guide on Power BI-enabled planning solutions made the most sense. The reasons for this include:

- Power BI's position as the market leader in the BI market
- The strength of the Microsoft tech stack and ability to utilize the tech stack in building planning solutions
- The realization that most BI-enabled planning solutions were built on top of Power BI



With that in mind, the guide is primarily focused on five solutions in the marketplace

- **Acterys**
- **Aimplan**
- **deFacto Global**
- **Lumel Technologies (inforiver)**
- **Power ON (insightsoftware)**

WHAT TO EXPECT FROM THE GUIDE

In preparing to write this guide, we spent several hours with each tool and provided them with a sample data set that included revenue, headcount, and operating expenses. We asked each tool to show us how they would build a plan for each component. This demonstration helped us gain an appreciation for how each tool managed the day-to-day forecasting challenges many of us face.

In this Guide, we'll:

- Provide a company overview
- Provide a product overview
- How each tool works technically
- Key items about each tool

While our primary focus is on Power BI, we'll also touch upon other noteworthy tools in the market at the end of the guide, providing a holistic view of the BI-enabled planning landscape.

Join us on this journey as we unravel the potential of planning solutions within Power BI, and discover how this integration is reshaping the future of business intelligence and strategic planning.

Overview: Understanding Planning in Power BI

This guide focuses on planning tools within the Power BI environment. If you're considering these tools, it's important to know they require you to operate within the Microsoft Power BI ecosystem. For organizations not using Power BI, this means investing in the platform and adopting it as your primary interface for planning, reporting, and data management.

Key Considerations

- **Data Flexibility:** Regardless of whether you use Power BI-based tools or standalone tools, your back-end data sources (e.g., SAP, Oracle, Dynamics) can remain unchanged. Both approaches allow you to work with the same data; the key difference is how you interact with it through Power BI or another tool
- **Front-End Commitment:** By choosing Power BI-based tools, you are committing to using Power BI as your front-end interface for planning, forecasting, and reporting

We would like to emphasize, a key advantage of Power BI-based planning tools is that finance teams can own their tools. This creates two distinct advantages:

- **SaaS Integration:** These tools leverage Power BI's SaaS infrastructure, ensuring security, scalability, and sustainability
- **Unified Data:** Planning, reporting, and analytics stay within the same system, eliminating the need for additional tools and making it easier for users to manage everything in one place

However, for organizations not already skilled in Power BI, it's crucial to strategically evaluate the investment in Power BI and related skills before committing.

BENEFITS OF POWER BI AS THE FRONT-END



Seamless Integration:

Power BI connects effortlessly with other Microsoft tools like Excel, Teams, and Office 365.



Powerful Analytics:

Gain access to Power BI's advanced data visualization and reporting capabilities.



Unified Platform:

Centralize your planning, analytics, and data management in one ecosystem.



Collaboration:

Collaborate easily across departments with familiar tools like Microsoft Teams and Excel.



Ecosystem Advantage:

Leverage the entire Microsoft technology stack for enhanced efficiency and productivity.

Considerations



Platform Lock-In:

Requires commitment to Microsoft Eco-system.



Learning:

Power BI knowledge (Power Query, Data Modeling, DAX). Even though the tools we evaluated require different levels of Power BI knowledge, you'll need good internal Power BI knowledge to be successful.



Flexibility

Power BI can enforce some limitations that the tools can't overcome.

VENDOR COMPARISON TABLE*

* Information contained in the table is as reported by the vendor

Product*	Acterys	Aimplan	deFacto Global	Lumel Technologies (inforiver)	Power ON (insightsoftware)
Year Founded	2015	2022	2009	2010	2016
No. of Employees	>50	<10	<50	>200	>1,000
Headquarters	Australia	Sweden	New York	Texas	North Carolina
Target Market (Revenue)	\$1B+	\$50M to \$500M	\$200M to \$5B	\$100M+	\$500M+
Industries Served	All	All	All	All	All
Avg Professional Service Implementation Hours	25+	30-80	100-300	40+	10-50
Planning Support	XP&A	FP&A	XP&A	XP&A	XP&A
Templates/Pre-built Planning Modules	✓	✗	✓	✓	✓
Utilize Custom Power BI Visuals	✓	✓	✓	✓	✓
Excel Add-In	✓	✗	✓	✗	✗
Utilize AI/ML	✓	✓	✓	✓	✓
Utilize Generative AI	✓	✗	✓	✗	✗
Supports On-Prem	✓	✗	✓	✓	✓
Supports Cloud	✓	✓	✓	✓	✓
SOC2 Compliant**	✓	✗	✓	✗	✓

** **Note:** Soc2 Compliance is subject to change please reach out to vendor for current status



Website: [Acterys: Planning, Consolidation For Power BI & Excel](#)

Founded: 2015

Founder(s): Martin Kratky & Hesam Ziaei

Employees: <100 Employees

Headquarters: Sydney, New South Wales, Australia

Target Customer: Industry agnostic, \$1B+ Revenue, 1K+ Employees

Average Professional Service Hours Required for Implementation: 25+

Implementation Vendors: Collectiv, P3 Adaptive, PmOne, GKH, TC Data, KPMG, Accenture, Microsoft, Rockfeather, Cosmos, among others. See [partner page](#) for more details.

COMPANY:

Acterys was founded by Martin and Hesam with the aim of consolidating data warehousing, planning, modelling, and reporting into a single application built on the Microsoft technology stack. With over two decades of experience in implementing planning tools like TM1, Jedox, Board and others, the founders recognized the need for an integrated solution within Microsoft Power BI. Acterys was designed to be easily implementable across all market segments, offering tailored solutions from pre-configured applications to the comprehensive Acterys xP&A Suite.

PRODUCT:

Acterys aims to distinguish itself in the market with its versatile product line catering to small and large businesses, leveraging the Microsoft tech stack to offer unique features such as collaborative write-back capabilities in Power BI. In 2023, Microsoft licensed Acterys's enterprise platform as the XPNA planning module for Microsoft Dynamics F&O. Acterys offers three solutions: Acterys Apps and Acterys xP&A Suite, and augmented business applications. Our focus is on the Acterys xP&A Suite, which is designed for enterprise-level planning. The tool has

- **Smart XL Visual** – Excel-based visual that allows you to write formulas and import Excel files in Power BI
- **Excel Add-in** – Work directly in Excel and writeback to the database
- **Acterys Power BI Visuals** – These visuals enable writeback between Power BI and a structured database (i.e., OneLake, Snowflake, Azure SQL, etc.)
- **Acterys Modeller** – The Acterys Modeller is a tool for data integration, modeling, and planning within Power BI and Excel

Acterys recently released the Smart XL Visual and the new Excel Add-in, and the goal of this new release is to make it seamless to plan in Power BI, Excel, and an Excel like environment within Power BI.

Strengths/ Unique features

01

The ability to import Excel files into the Excel visual and then load the data to Power BI via Acterys functions

02

The new Excel add-in that allows writeback directly in Excel

03

The product suite with the xP&A platform and the Acterys prepacked apps for rapid deployment

OPPORTUNITIES/THINGS TO REMEMBER:

- The new XL smart visual and Excel add-in are very new features, and with new features, one often goes through growing pains
- Some customers state the product can be a bit complex to learn, especially for non-technical people
- Some customers have mentioned concerns about refresh speed

ACTERYS' COMMENT:

"A revolutionary platform that seamlessly integrates Power BI and Excel, empowering businesses with real-time data entry, governance, advanced planning, and financial modeling capabilities. Its unmatched flexibility allows for scalable, customized solutions, transforming decision-making and enhancing business efficiency across industries."



Website: [Power BI Planning, Forecasting & Budgeting by Aimplan](#)

Founded: 2022

Founder(s): Erik Lidman

Employees: <10 Employees

Headquarters: Skelleftea, Sweden

Target Customer: Industry agnostic, Midmarket, \$50M to \$500M in Revenue

Average Professional Service Hours Required for Implementation: 30-80 Hours

Implementation Vendors: Accigo, Sogeti, Random Forest, Cap Gemini, Greenstep, 480th Consulting, and others in Europe and North America. See [partner page](#) for more details.

COMPANY:

Aimplan was founded in 2022 by Erik Lidman in Sweden. Aimplan's goal is to become the global market leader in FP&A solutions based on the Microsoft Power BI Platform. The founder, Erik, spent over 25 years in the FP&A software space delivering FP&A solutions before starting Aimplan with the goal of making it easy to plan within Microsoft Power BI. Aimplan is one of the youngest players in this space and completed a seed round of funding led by Born Capital in May of 2023. Aimplan provides organizations with planning, forecasting, financial reporting, and master data management solutions.

PRODUCT:

The Aimplan solution is the newest tool in the market, founded only two years ago, and is 100% focused on the cloud. The tool is focused on providing custom visuals and a SaaS service for budgeting, planning forecasting, and master data management on top of your existing Power BI data model for midmarket customers. The tool has very attractive-looking custom visuals that are easy to use and update. The Aimplan approach relies on the customer's existing Power BI semantic model but can create storage tables if needed for updating source data in Power BI. This limits the movement of your company data between your environment and your company's planning module. The Aimplan product consists of:

- Custom visuals to support planning (Revenue, Salary, Opex, P&L, etc.)
- Master Data Management (MDM)
- Commenting
- Approval Processes

We found Aimplan to be a solid tool with a lot of promise as it continues to scale and build.

Strengths/ Unique features

01

Full audit log stored in data

02

Very user-friendly interface with a lot of drag-and-drop functionality

03

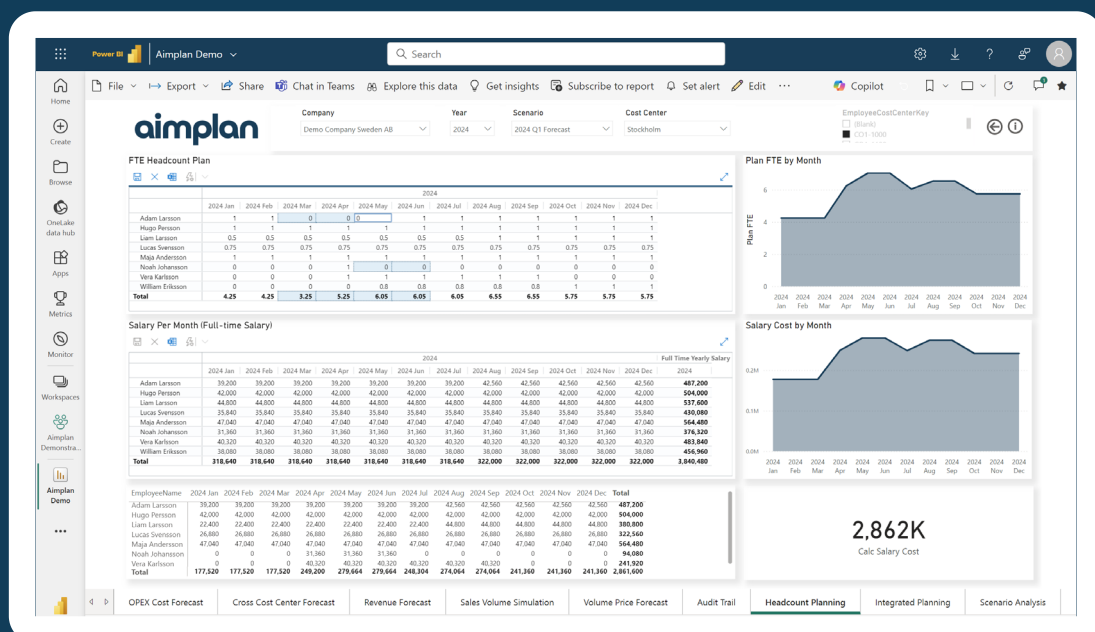
Ease of splashing data across rows and columns

OPPORTUNITIES/THINGS TO REMEMBER:

- Aimplan is the newest tool in the market and is still growing out features and functions that some more mature tools might already have
- Aimplan assumes you have your own data model and dataset in place, which is different from many other tools
- Aimplan is 100% SaaS cloud-based and doesn't offer On Prem or Private Cloud offering, but customers can choose to configure the storage of their Aimplan data to target their own Azure tenant

AIMPLAN'S COMMENT:

"Aimplan transforms Microsoft Power BI into a complete financial planning and analysis solution. Streamline budgeting, forecasting, and reporting processes with up-to-date data and seamless collaboration, empowering CFOs and controllers to make faster, data-driven decisions and achieve strategic goals."



Website: [deFacto Planning CPM Software - Overview - deFacto Global Inc.](#)

Founded: 2009

Founder(s): Bob Bedard, Anthony D'Anna

Employees: <50 Employees

Headquarters: Troy, New York, USA

Target Customer: Industry agnostic, \$200 Million to \$5 Billion in revenue

Average Professional Service Hours Required for Implementation: 100-300 Hours

Implementation Vendors: Sikich, Accenture, Sunrise, DXC, and others.
See the partner [page](#) [page](#) for more details

COMPANY:

deFacto Global was founded in 2009 and is currently based in Troy, New York. deFacto Global focuses on making financial and operational planning easy by leveraging Microsoft products people use daily. Prior to starting deFacto Global, the core team worked together at Praxinet, Inc., a technology consulting firm that implemented corporate planning solutions from Oracle and SAP for over a decade. deFacto Global is proudly 100% privately held, as it believes that it allows it to serve its customers' needs vs the needs of investors. The software is focused on being the premier Integrated Business Planning solution, fully integrated with the Microsoft technology stack, including Power BI and Excel.

PRODUCT:

deFacto Global takes a different approach to working within Power BI from the other the other products on the market. Power Planning is a model-based solution that is built using Microsoft's In-memory Tabular database. It allows users to create and view reports, input templates and models in:

- Modeler (Administrator interface)
- Excel
- Power BI

The solution is not just a visual on top of Power BI with writeback enabled, but a planning solution that uses different input methods to do your reporting and planning. The tool has a calculation engine, with built-in Financial Intelligence, but does not require you to write any DAX. You can also create reports in Excel and display them, fully formatted, in Power BI.

The product is focused on a platform approach rather than being just a planning tool or add-on solution. It is built around the Microsoft technology stack, and you can use the deFacto API with Excel, Power BI, and PowerApps. Each model's dimensions, attributes, and calculation logic are configured using the deFacto Modeler. Data can be viewed or entered via Excel or Power BI.

Strengths/ Unique features

01

The ability to click on a number in Power BI and then see underlying transactions that support that number

02

The ability to create reports in Modeler and have the DAX written for you

03

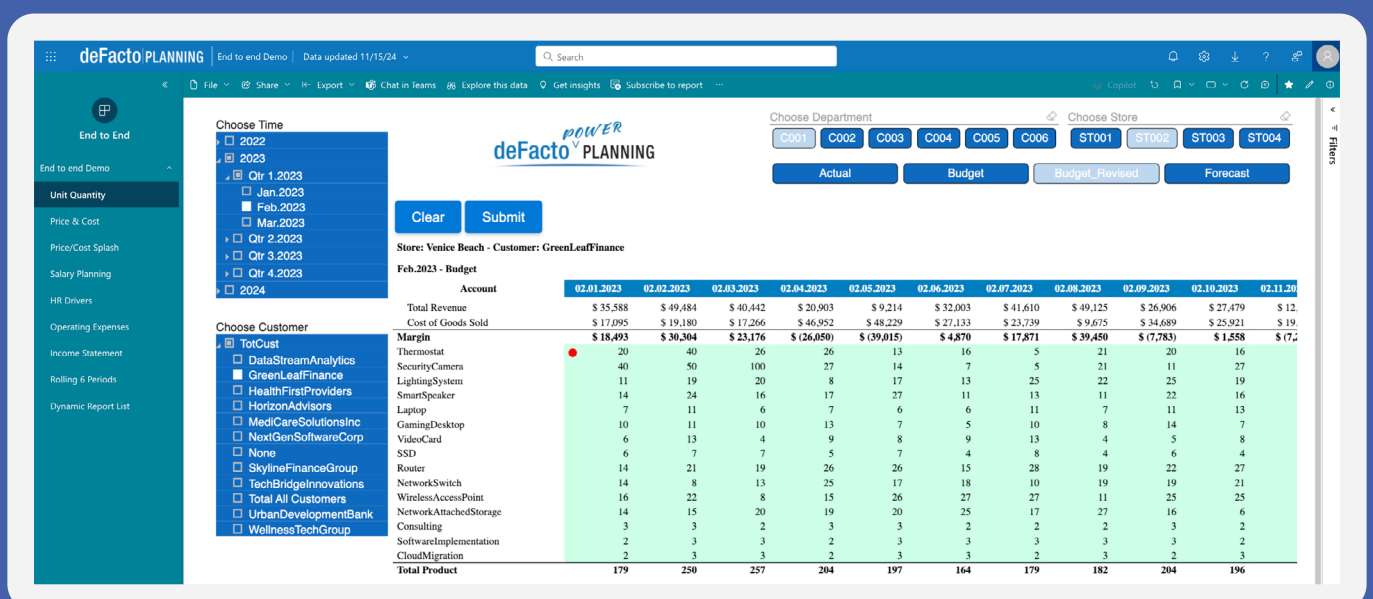
Writes data back to tabular database from multiple input methods

OPPORTUNITIES/THINGS TO REMEMBER:

- We would like to see the ability to edit charts and graphs by dragging the line and having the change writeback to the database, versus changes only occurring by modifying the numbers in the reports
- Defacto Power Planning takes a different approach from other tools in the guide, which are an add-on on top of Power BI vs a modeling platform that provides read/write capability within Power BI
- Modeler interface UI feels somewhat dated compared to newer tools on the market

deFacto Global's COMMENT:

"deFacto Power Planning is the most capable Power BI and Excel-enabled Integrated Business Planning platform used by brand name organizations across industries. It is top ranked for customer satisfaction, ease-of-use, financial and operational planning, self-service and more. "



LUMEL TECHNOLOGIES (INFORIVER)



Website: [Consolidate planning & analytics in Power BI With Inforiver](#)

Founded: 2010

Founder(s): Gopal Krishnamurthy

Employees: >200 Employees

Headquarters: Plano, Texas, USA

Target Customer: Industry agnostic, \$100M+ in Revenue

Average Professional Service Hours Required for Implementation: 40+ Hours

Implementation Vendors: Obvience, IT-Logix, Data Crafters, and others. See [partner page](#) for more details.

COMPANY:

Lumel Technologies was founded in 2010 by Gopal Krishnamurthy as Visual BI Solutions Inc. Lumel Technologies is the software division of Visual BI Solutions (whose consulting services division was sold in 2021). Lumel offers a host of data apps that integrate with Microsoft Power BI and Fabric, including planning, master data, reporting, analytics, project management, and more. Lumel has over 100 software engineers developing its product suite and has focused for more than a decade on building an integrated enterprise performance management platform. On top of BI platforms, Lumel's XP&A planning solution consists of multiple modules and is focused on giving you the power and flexibility of spreadsheets within Power BI and helping you retire many of your existing legacy BI and planning tools.

PRODUCT:

Lumel has built several different planning modules, and over the last year, these have been brought together with other product updates to create a holistic XP&A planning solution. The solution is built so customers can buy individual modules or the entire suite of tools. The modules for the XP&A platform include:

- **Inforiver matrix** – consolidates your planning, reporting & analytics in Power BI. The foundation of the Inforiver matrix is its writeback capabilities
- **Inforiver Table Editor (EDITable)** – Allows you to manage your master reference data and update your dimensions and attributes as needed directly on top of your data platform
- **InfoBridge** – Connected planning tool that bridges (streams) data between different planning models and data sources to simplify modeling and integrated planning

- **inforiver Analytics+** – Provides a single custom Power BI visual with 100+ Charts, KPI Cards, Table. It is IBCS Certified and offers complex waterfall chart types to visualize variance analysis
- **ValQ** – Driver-based Planning Application designed to support more complex modeling use cases

Lumel has an exciting vision for the product and focuses on providing users with many of the benefits of Excel in a scalable enterprise solution within Power BI.

Strengths/ Unique features

01

Easy to get started due to No-Code/Low-Code approach with collaborative planning

02

Supports simple modeling in Inforiver and more complex visual and driver-based modeling in ValQ

03

Very robust workflow, commenting, and collaboration functions throughout the suite of tools

OPPORTUNITIES/THINGS TO REMEMBER:

- Some customers have mentioned a desire for more customization with inforiver Analytics+
- The suite of solutions takes some time to become familiar with as it is very powerful and has multiple modules working together
- Does not have an Excel Add In

LUMEL'S COMMENT:

“Lumel empowers enterprises to look forward and think ahead with an innovative suite of products for real-time integrated planning, reporting, and analytics. Lumel delivers cutting-edge, no-code, self-service user experiences to leverage your modern data platform investments and retire legacy solutions.”

Create no-code planning templates



Power ON (insightsoftware)

Website: [Power ON - insightsoftware](https://poweron.insightsoftware.com)

Founded: 2016

Founder(s): Bob Bedard

Employees: <1,000+ Employees

Headquarters: Raleigh, North Carolina, USA

Target Customer: Industry agnostic, Revenue: \$500M+, Headcount: 1,000+

Average Professional Service Hours Required for Implementation: 10-50 Hours

Implementation Vendors: Strong partner network. See [website](#) for more details.

COMPANY:

Power ON from insightsoftware was one of the first write-back-enabled planning tools built to work with Power BI. insightsoftware acquired Power ON in 2023. insightsoftware has a comprehensive portfolio of products aimed at supporting the Office of the CFO and is headquartered in Raleigh, North Carolina. insightsoftware has three write-back-enabled tools, Power ON, Vizlib, and Fiplana. insightsoftware is focused on enabling the office of the CFO to connect to and make sense of their data in real-time. insightsoftware offers multiple budgeting & planning solutions, of which Power ON is one of their solutions; the reason for this is they are focused on bringing planning and budgeting solutions to you where you are as a company.

PRODUCT:

Power ON was one of the first write-back-enabled planning tools to come to market. We first learned about them in 2017, and we were intrigued by the idea then. Today, the product is focused on supporting financial and operational planning across the organization. The product includes:

- Master Data Management
- Custom visuals to include Power XL
- Pre-built planning application with Budget Planner
- Extended Planning & Analysis

We were very impressed with the look and feel of the Power XL visual, which included an Excel-like matrix grid. We found the master data management screens are easy to follow and update.

Budget Planner is a nice edition as it makes it easier to plan, especially with PnL capabilities, enhanced commentary, and advanced goal seek functions. The goal with Budget Planner is to meet 80% of your needs and limit the amount of customization that is required when onboarding a customer.

Strengths/ Unique features

01

Excel-like visuals and functionality built on top of Power BI with Power XL, which is often mentioned as a favorite feature in customer reviews

02

Budget Planner is straightforward and easy to use

03

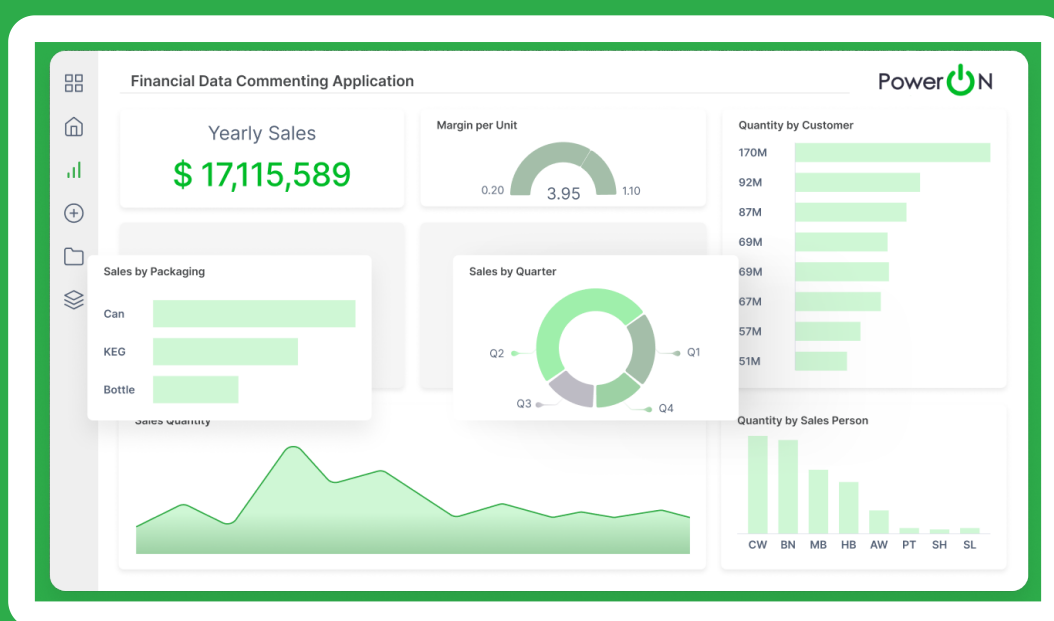
insightsoftware has a complete suite of products for the office of the CFO, which goes far beyond just budgeting and planning

OPPORTUNITIES/THINGS TO REMEMBER:

- Customers mention that custom visuals and setup can be somewhat complex to use
- Power ON is part of a portfolio company, which can lead to distributed focus and investment versus a standalone company
- The Budget Planner was released in 2024 and is relatively new

POWER ON'S COMMENT:

“Power ON enhances Power BI into a robust tool for planning, budgeting, forecasting, and real-time write-back. It extends beyond business intelligence, allowing businesses to plan, model, collaborate, and forecast directly within Power BI.”



OTHER BI-ENABLED PLANNING SOLUTIONS

SLVD-BI

www.slvd-bi.com



Overview: Solved was founded in 2022 by Luka Okorn, Dennis K., and Matevz Javornik to provide planning capabilities inside of Power BI. The founders of the company are based out of Slovenia and have a strong background in data analytics and business intelligence. The tool is one of the newer solutions out there and the product is still being built out and we are excited to watch the development. They have created a writeback visual called WeWrite that facilitates writing back to the data in Power BI and collaborating in real-time through its commenting capabilities. Currently Solved offers a free trial month to test the product and transparent per user pricing published directly on the website.

FIPLANA

www.fiplana.com



Overview: Fiplana was founded in 2015, originally as INFORM Write and in 2023 the company was sold to insightsoftware a global provider of solutions for finance. Fiplana is a planning tool that is built upon the Qlik Business Intelligence platform. The tool was featured in the 2nd edition of the 3rd Generation FP&A tools market guide, and you can find a detailed write-up [here](#). Fiplana has strong charting capabilities, the analytical and BI capabilities you would expect in an analytical tool, combined with the ability to plan your budget.

PHOCAS SOFTWARE

www.phocassoftware.com



Overview: Phocas Software was founded in Australia in 2001 as a business intelligence platform. Phocas is its own BI solution and the planning is built within the tool not on top of another commercially available solution. The company's main areas of expertise are in manufacturing, distribution, and retail, and they raised \$45M in 2021 to expand the software, including adding financial planning and reporting capabilities. Today, Phocas markets itself as BI and FP&A together for smarter decisions. Phocas was featured in the 1st ever 3rd Generation FP&A guide as a new entrant in the planning space. Phocas is focused on midmarket and enterprise customers within the industries they serve.

ACCOPLANNING

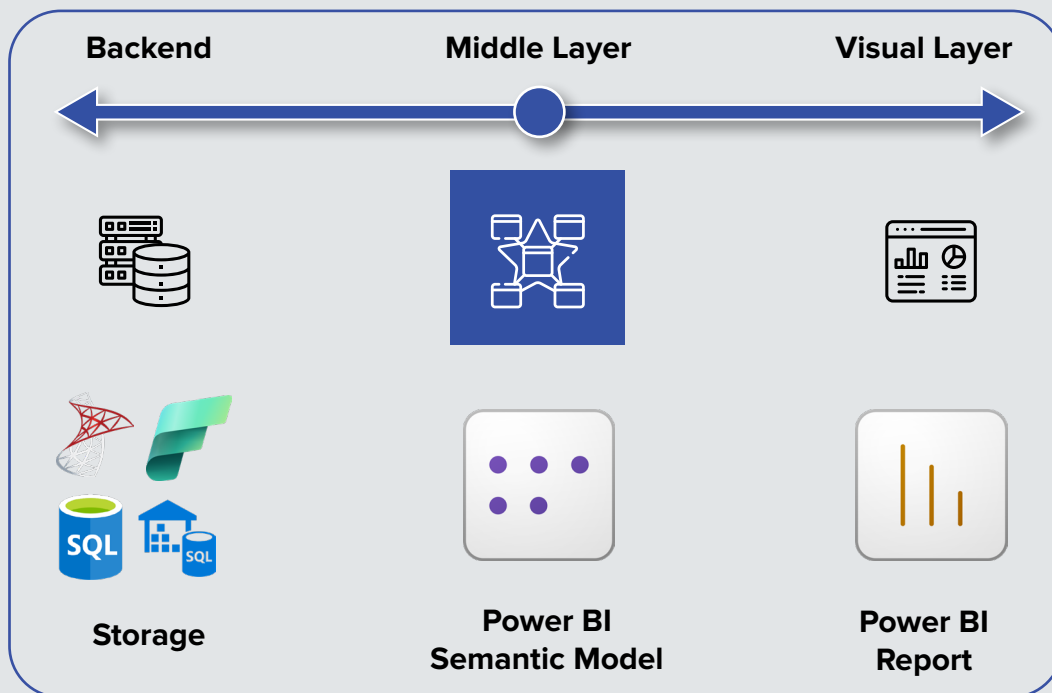
www.accotool.com



Overview: AccoPlanning is based in Denmark and offers planning within Power BI using writeback capabilities. The company has two main products: planning for Power BI functionality and a product to manage master data for Power BI. Much like Solved, the pricing is transparent and based on a per-user model and includes a free trial. A review of online feedback regarding the tool often comment that the tool is intuitive and easy to use.

TECHNICAL COMPARISON

When analyzing the technological approaches of DeFacto Global, Power ON (insightsoftware), Acterys, Aimplan, and Lumel Technologies (inforiver), we can categorize them into three distinct approaches, each targeting different organizational needs and technological preferences.



deFacto Global:

Proven Approach for Minimal Change

DeFacto adopts a traditional approach similar to older planning tools like Hyperion. From a technology perspective, it brings the familiarity of legacy tools while seamlessly integrating with Power BI. This makes DeFacto an excellent choice for organizations looking to minimize disruption while transitioning to modern BI-driven planning. It retains the robust functionalities of legacy planning solutions, ideal for those who are accustomed to these older systems but want to leverage Power BI's capabilities.

Best For: Organizations seeking continuity from legacy tools with minimal technological change while benefiting from Power BI integration.

Power ON (insightsoftware), ACTERYS, AND AIMPLAN:

Middle-Layer Approach for Flexibility and Enterprise Features

Power ON, Acterys, and Aimplan share a similar middle-layer architectural framework, where the data model operates independently, leveraging a visual front-end and a robust back-end. However, these tools offer different levels of complexity, customization, and enterprise support, meaning customers must choose based on their specific needs:

Power ON (insightsoftware): Targets larger enterprises with Power BI that need robust enterprise features such as private cloud or on-premises deployment, enhancing Power BI's existing functionality. It's more complex than the other offerings, but it comes with significant scalability and security options.

Acterys: Positioned between the others, Acterys offers flexible deployment options and scalability, making it a strong choice for mid-sized to large organizations looking for rapid deployment and the ability to manage complex financial models.

Aimplan: The simplest and easiest to deploy of the three, Aimplan is designed for mid-market organizations that want the benefits of Power BI-based planning without the need for extensive technical complexity.

Best For: Organizations that need to balance complexity, deployment options (cloud, private cloud, or on-prem), and enterprise features. The choice between Power ON, Acterys, and Aimplan depends on the level of enterprise support and scalability required.

LUMEL TECHNOLOGIES (INFORIVER):

Front-End Driven, Scalable, and Easy to Adopt

Lumel takes a unique front-end-driven tabular approach. Instead of relying on a middle-layer data model, Lumel pushes the modelling logic into the Power BI visual layer, making it an easier tool to adopt from a user perspective. It strives to offer an Excel-like interface with no-code/low-code functionality, allowing users to quickly get started on top of their Power BI semantic models for Actuals without sacrificing enterprise-level features like security, audit, governance or collaboration. Lumel offers integrated cell level collaboration and approval workflows.

Lumel Offers Multiple deployment options (SaaS, on-prem, private cloud) that gives options to customers of all sizes

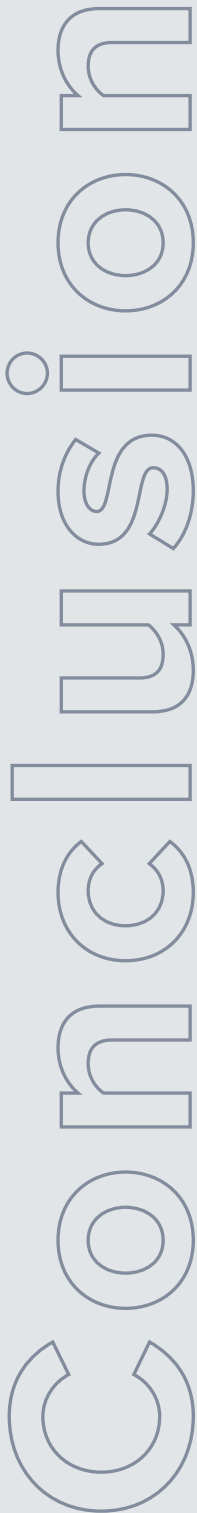
Best For: Organizations looking for self-service, Ad Hoc, and fast implementation for their planning needs while offering powerful collaboration and enterprise features. Lumel is ideal for companies that want to implement quickly and scale over time.

SUMMARY

DeFacto Global: Best for those seeking minimal disruption and a seamless transition from legacy tools with Power BI integration.

Power ON (insightsoftware), Acterys, and Aimplan: Best for organizations needing scalability and flexibility. Customers should choose based on their enterprise needs and the level of complexity they are willing to manage, as PowerON offers the most robust enterprise features, Acterys balances complexity and flexibility, and Aimplan provides a simpler, cloud-based option.

Lumel Technologies (inforiver): Ideal provides organization a no-code/low-code adoption path, with a front-end-driven approach that limits coding but still provides strong collaboration and enterprise features. Lumel scales from simple usage to more complex enterprise needs.



The world of Financial Planning and Analysis (FP&A) is undergoing lots of change, driven by the need for greater flexibility, accuracy, and insight. Today's FP&A teams are expected to do more than ever before, the role continues to become more challenging and rewarding than ever before. With the increased demands placed on FP&A comes the need for ever more assistance from technological solutions to help FP&A teams be more powerful.

This is one of the main reasons we have seen an explosion in planning tools and the rise of writeback-enabled planning solutions. These solutions combine the analytical capabilities of BI with many of the planning capabilities of traditional planning tools. By leveraging writeback features within BI tools, FP&A teams can implement powerful solutions that the businesses are familiar with.

As AI continues to augment these capabilities, the potential for innovation in FP&A is boundless. Seeing many of these tools taking advantage of the Microsoft tech stack to provide additional solutions to planning is exciting. These BI-enabled planning solutions give the customer more options than ever. However, it's crucial to remember that technology alone isn't the solution. The true power lies in how FP&A professionals harness these tools to drive strategic thinking and value creation within their organizations. This is true for traditional planning tools, and BI-enabled tools; the technology, regardless of what you choose, is just that technology.

Looking ahead, we anticipate continued rapid evolution in the FP&A tools market and the development of more Power BI-enabled solutions. As practitioners ourselves, we're committed to fostering this growth and helping professionals like you navigate this exciting landscape.

We encourage you to explore this guide and learn about the tools that allow you to plan within your BI tool. We hope you find this guide beneficial, and we look forward to your feedback.

Thank you for joining us on this journey through BI-enabled planning. We hope this guide empowers you to transform your FP&A processes and deliver unprecedented value to your organization.

APPENDICES

RESEARCH METHODOLOGIES USED FOR GUIDE

01

Vendor Surveys

We completed two vendor surveys with each vendor highlighted in the guide and used that information to inform our write-up

02

Demo Meeting

Each company shared a demo of the tool and completed an exercise based on the data we provided to each vendor

03

Online Research

We conducted online research on many of the tools, and some of this information was incorporated into the guide

In addition to the above methodologies used for gathering information on the tools, we gave each vendor the opportunity to add 40 words to the guide to share with you what they want you to know about them as a tool.

Note: The tools selected for incorporation in the guide were based on criteria established by the authors. Each tool included in the main writeup of the guide is fully integrated with Power BI and provides the ability to budget and forecast in Power BI using the company's product. At the end of the guide, we have included several other writeback-enabled solutions, including some that are not built on top of Power BI.

Planning Guide for Power BI



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