

Joining the data

The real power of data analysis comes when you join the data from your ERP system with data from the other applications you use to support the operations of your business. This allows companies to structure the information in ways that lets them analyze every aspect of their business, giving a holistic view of their company.

Look for an ERP system that:

- Allows users to collect information from your other business applications, such as Salesforce and Marketo, so you are not limited to just the data your ERP can see.
- Gives you multiple ways to export and use the data, including dashboards, reporting, Excel, or business intelligence tools, so you can always use the right tools for the task.
- Provides you with the ability to aggregate and visualize data, so information can be presented in reports and dashboards using graphs, tables, and more.

Reporting the data

Most KPIs indicate the financial health of the organization in four major areas: Profitability, productivity, cash flow, and solvency. However, financial professionals should be able to understand the reason behind the numbers, and, even better, be able to predict future behavior.

Regardless of the tool you use to analyze data—Excel, PowerBI, Looker, Tableau—the goal is always to provide actionable information for decision making.

Will these reports be for limited or broad distribution?
Who should have access to these reports?
What decisions can be made based on the information provided?
How will the information be presented? Graphically? Online?

Look for an ERP system that:

- Comes with reports you can use out-of-the-box as well as the ability to customize reports for your unique business processes.
- Automates report generation, saving your staff time for more important tasks.
- Allows role-based dashboards, so key staff always have an at-a-glance view of the information they need.



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Conclusion

The CFO's job is never easy. But armed with the right ERP system and analytical tools, you can get to your data and make sense of it, giving your organization the actionable intelligence it needs not only to survive, but to thrive.