

PROPOSAL OVERVIEW

Smart Reporting for Finance Teams

Power BI Finance Pack · Delivered by Spoon Consulting

300+

Consultants

200+

Clients

7

Offices

15%

Avg Growth

What We Deliver



P&L Statements



Balance Sheet



Cash Flow Forecast



KPI Dashboards



Executive Reports

Why Finance Teams Need a Better Way

Most organisations face these four critical pain points in financial reporting today.



Fragmented Reporting

P&L, Balance Sheet, Cash Flow siloed across different tools and spreadsheets.



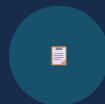
Delayed Insights

Manual processes mean financial data is always behind when decisions need to be made.



Inconsistent Numbers

Different formats reduce trust and require constant reconciliation before sign-off.



Low Analytical Value

Finance teams spend 70% of their time building reports rather than analysing them.

One Preconfigured Pack. Complete Financial Reporting Solution.

Delivered by the experts of a leading Data & Analytics firm, the Spoon Power BI Finance Reporting Pack accelerates implementation timelines and optimizes costs.

- ✓ Clearly defined scope: P&L, Balance Sheet, Cash Flow & KPIs
- ✓ Pre-built methodology for accelerated deployment
- ✓ Comprehensive training materials for user adoption
- ✓ Finance frameworks from industry best practices



Comprehensive Finance Dashboards

Interactive P&L, Balance Sheet & Cash Flow



Live KPI Tracking

Real-time KPIs with drill-through & filters



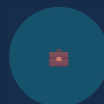
Instant Financial Insights

Visual analytics for fast executive decisions



Consistent & Professional Reporting

Standardised Power BI dashboards



Management Reporting

Accelerate reporting and decision cycles

Measurable Impact From Day One



30–50%

MANUAL REPORTING TIME



30–40%

AUDIT PREP EFFORT



25–35%

FINANCE PRODUCTIVITY



40–60%

DECISION CYCLES



Standardisation

One version of financial truth



Transparency

Drill-through to every transaction



Governance

Audit-ready traceability



Decision Power

Real-time proactive insights

Five Pre-Built Dashboards

Fully configured and ready to deploy — no setup required from scratch.



Financial KPI Dashboard

EBITDA · Net Margin · Liquidity · Debt-to-Equity
· NAV trend analysis



Income Statement

Revenue to Net Profit · CY vs PY · Drill-down by
category & entity



Balance Sheet

Assets, Liabilities & Equity · Real-time solvency
with variance



Cash Flow Forecast

12-month outlook · Receivables, payables, net cash & working capital



Drill-Through Explorer

One click from executive KPI to individual transaction detail

3-Month Delivery Approach

From discovery to full handover — structured, low-risk, and accelerated.

01

02

03

Month 1

Discovery & Design

- Business requirements
- Data source mapping
- Data model design
- KPI definition
- Governance matrix

Month 2

Integration & Build

- API pipelines
- Power BI data model
- Financial calculations
- Dashboard development
- Access control

Month 3

Test & Deploy

- Integration testing
- User acceptance testing
- Security validation
- Training manual
- Handover docs

Choose Your Pack

Fixed-scope packs for rapid, predictable deployment. All prices exclude VAT.

Gold

1 Data Source

- ✓ KPI Report (10–14 KPIs)
- ✓ Profit & Loss Statement
- ✓ Balance Sheet

Platinum

2–3 Data Sources

- ✓ KPI Report (15–19 KPIs)
- ✓ P&L + Budget data
- ✓ Balance Sheet
- ✓ Cash Flow (2 modules)

Titanium

4–6 Data Sources

- ✓ KPI Report (20–25 KPIs)
- ✓ P&L + Apportionment + Budget
- ✓ Balance Sheet
- ✓ Cash Flow (3 modules)

Custom

Complex needs

- ✓ Pre-scoping phase
- ✓ Multiple ERP sources
- ✓ Custom KPIs & structures

Let's Get Started

Four simple steps to transforming your financial reporting.

01

Review & Select

Choose your Finance Pack tier based on your data sources and reporting requirements.

02

Discovery Call

Schedule a session to align on data sources, scope, timelines, and success criteria.

03

Live Demo

Request an on-demand demo — see the dashboards working with real financial data.

04

Kick Off

Agree scope, sign off, and launch your structured 3-month delivery journey.

We look forward to transforming your financial reporting · www.spoon-consulting.com