

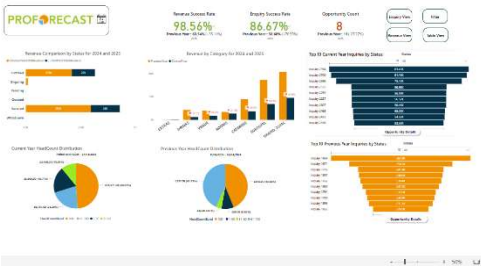
Case Study

HR SaaS
Application



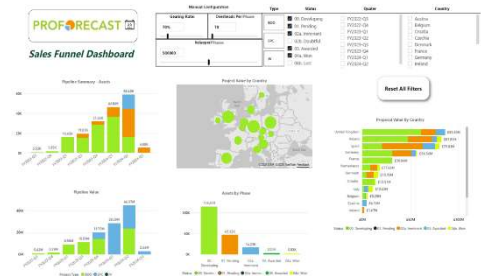
Introduction

- The client is a global HR SaaS provider that streamlines administrative processes for HR departments.
- Their finance team relied on Xero for core accounting and Excel for budgeting and reporting—an increasingly inefficient setup as the business scaled.
- ProForecast was selected to:
 - Streamline financial management.
 - Improve budget accuracy and build speed.
 - Enhance cash flow tracking.
 - Support strategic growth through scalable, AI-enhanced forecasting.



Clients Pain Points

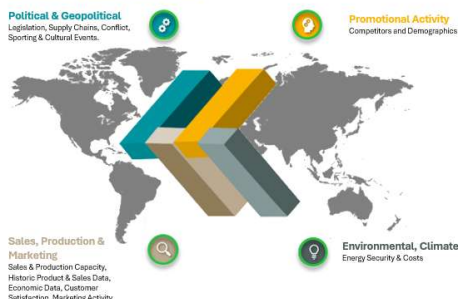
- Rapid growth and expanding income streams made budgeting and forecasting difficult.
- Excel-based workflows created bottlenecks and version control issues.
- Specific challenges included:
 - Building monthly reporting packs.
 - Tracking budgets and cash flow manually.
 - Adding new clients and revenue streams mid-year.
 - Limited “What If” planning tools.
 - Managing payroll forecasts and adjusting salaries/hours.
 - Ensuring overheads aligned with cost centre scale.
 - Xero’s reporting focused on historical data, lacking forward-looking insights.



Benefits Realized

- Direct Xero API integration simplified month-end actuals import.
- Automated reporting packs included rolling and variance reports.
- Filters enabled flexible divisional and departmental reporting.
- BI developers tailored the report suite to match existing structures.
- Significant reduction in time and stress for the finance team.
- Improved accuracy, efficiency, and confidence in financial data.

Demand Forecasting & AI Inputs



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ProForecast offers Mid-market Businesses' flexible, cost effective and comprehensive forecasting and strategic planning capability incorporating AI and Machine Learning.

ProForecast fully integrates into the core accounting system, providing businesses with a powerful and transformational tool to enable management to make informed decisions quickly and accurately.

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Quality Of Support

- Support rated 9/10.
- Setup was faster than expected despite data volume and complexity.
- The process was described as smooth and painless.

Application Strengths

- Intuitive interface with deep-dive and “What If” capabilities.
- Inbuilt templates simplified setup of loans, receivables, and payment terms.
- Accrual and prepayment options enhanced cash flow modelling.
- Subscription revenue profiles were automatically modelled for deferred income.
- High-performance reporting and dashboards improved month-end routines.
- Eliminated version control and formula errors common in Excel.

Application Dislikes

- Platform rigidity compared to Excel—custom changes require ProForecast support, which was responsive and effective.

Desired Features

- Satisfied with current features and UI.
- Impressed by ongoing enhancements and development roadmap.

Conclusion

- The client is pleased with their decision to adopt ProForecast.
- The platform has simplified operations, improved scalability, and enhanced reporting capabilities, delivering strong ROI and strategic value.