

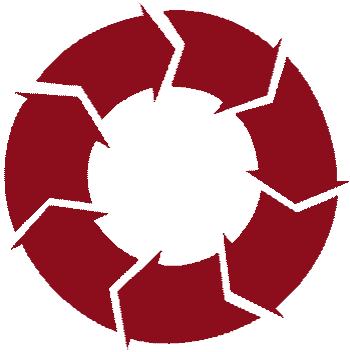
**ABACIST**  
**GROUP**

## **Company Overview**

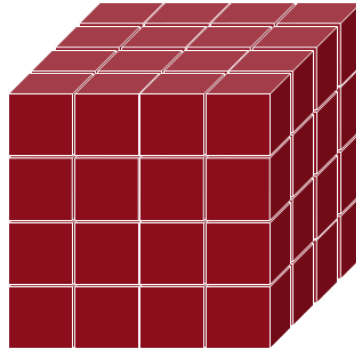
# Our Company

**Abacist Group** is a management consulting firm dedicated to providing services to our clients that result in higher performance and sustainable growth.

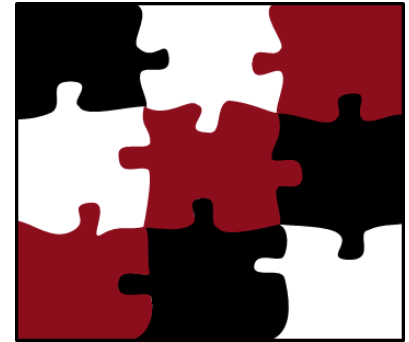
**Abacist Group** offers a dynamic suite of services around:



**Corporate Performance  
Management Consulting**



**Budgeting, Planning &  
Forecasting Software Sales  
& Implementation**



**Corporate FP&A Services**

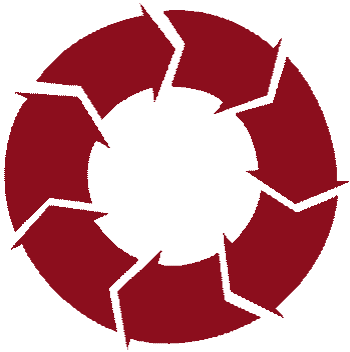
# Why do clients hire Abacist Group?

- To implement Budgeting, Planning & Forecasting Software and have the confidence that Abacist Group has been ranked #1 in customer satisfaction by its software partners and clients
- To conduct analysis to help drive strategy where understanding the financial impact of decisions is crucial including Pricing Analysis and M&A Analysis
- To help optimize an organization's Financial, Planning & Analysis processes knowing Abacist Group has executed over 100 projects in the FP&A space and has seen what works and what doesn't
- To augment their internal staff with capable interim or on-demand resources during times of peak demand or times of transition
- To build robust models to analyze the impact of key decisions knowing that Abacist Group has expertise with a variety of tools from Excel to Hyperion Planning
- To outsource Financial model Administration

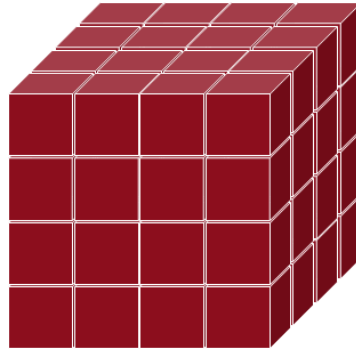
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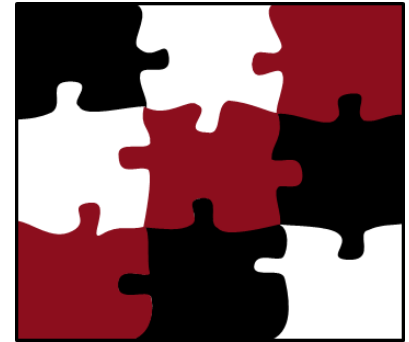
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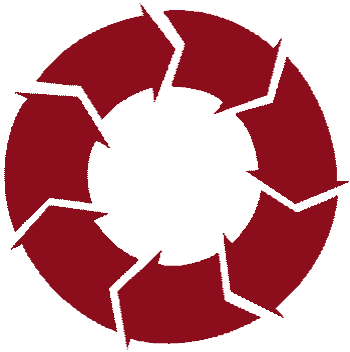


**Corporate FP&A Services**

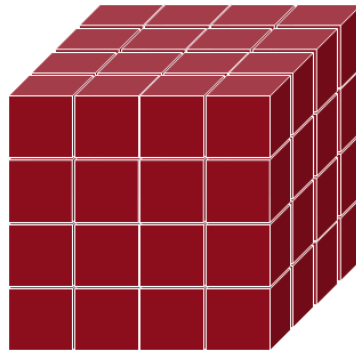
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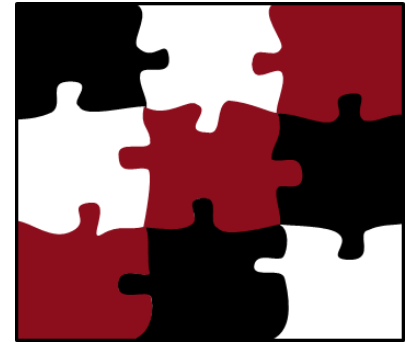
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**Corporate FP&A Services**



**A set of processes that enable business to define strategic goals, then measure and manage performance against those goals.**

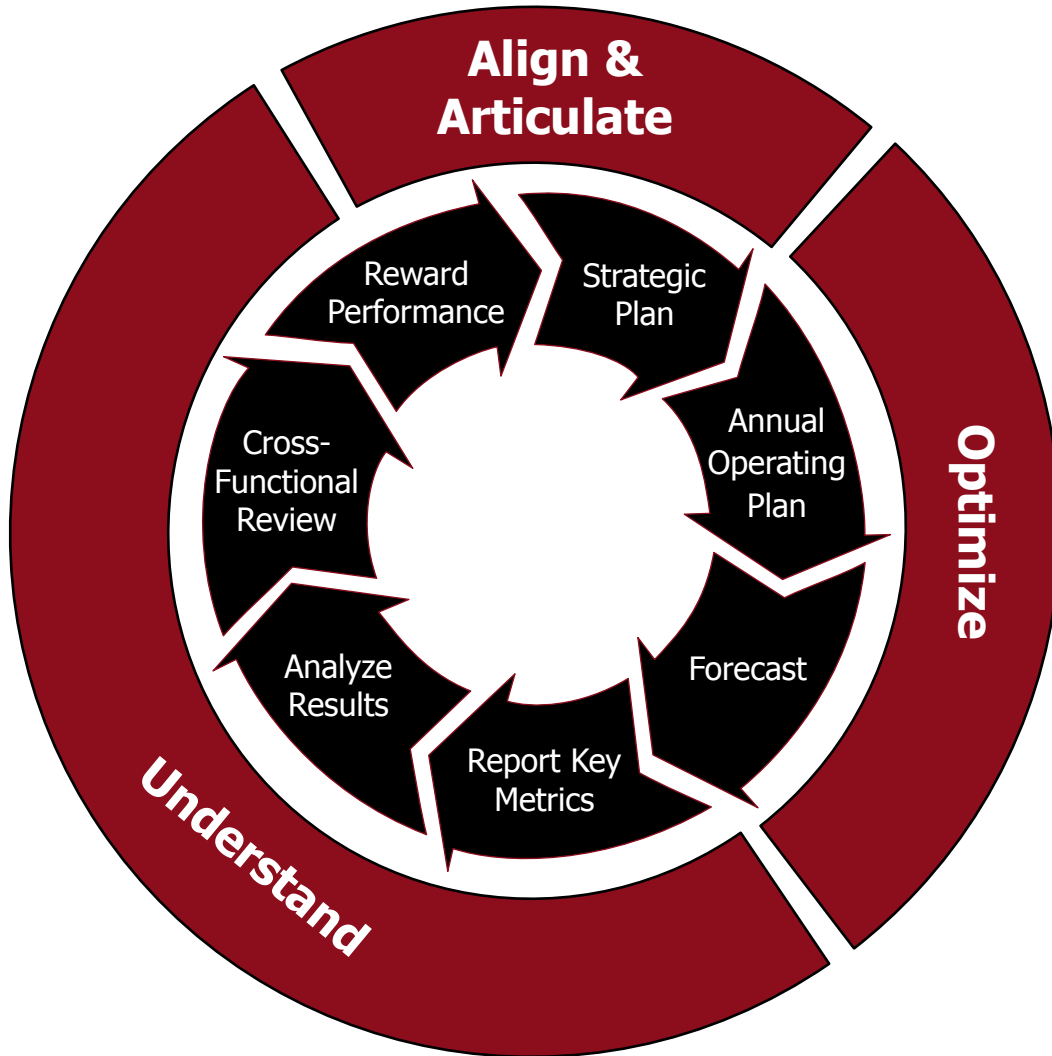
**Plan  
What  
Matters**

**Measure  
What  
Matters**

**Analyze  
What  
Matters**

**Reward  
What  
Matters**

# Our Services: Corporate Performance Management



## Align & Articulate

- What are your business goals?
- How do you plan to achieve them?
- Are your employees aware of your goals so they can help you grow?

## Optimize

- How can you best achieve your goals?
- What will be the impact of actions you are considering?

## Understand

- Where have you been?
- Are you on track to hit your goals?
- What areas are in need of course correction?

# Our Services: Corporate Performance Management



## Align & Articulate

- What are your business goals?
- How do you plan to achieve them?
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## We Deliver:

- Strategy Analysis
- Strategy Statement
- Strategy Blueprint
- Strategy Map
- Mission, Vision, Values
- Balanced Scorecard

## Optimize

- How can you best achieve your goals?
- What will be the impact of actions you are considering?

## We Deliver:

- Forecasting & Planning of Financials
- Activity-Based Planning
- Development of Key Business Driver Metrics
- Business Development Support

## Understand

- Where have you been?
- Are you on track to hit your goals?
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## We Deliver:

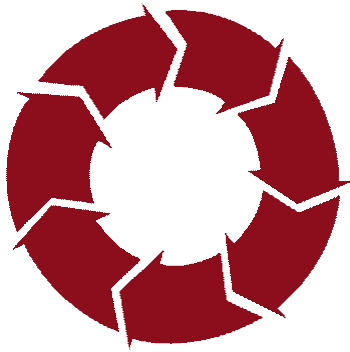
- Balanced Scorecard Reporting
- Analysis of Key Business Driver Metrics
- Development of Business Intelligence (BI) Tools
- Profitability Analysis
- Performance Benchmarking



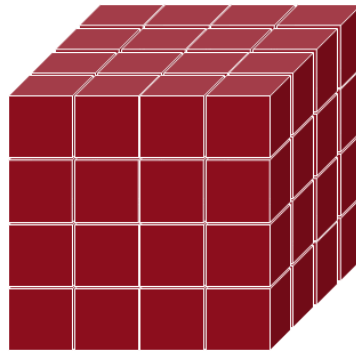
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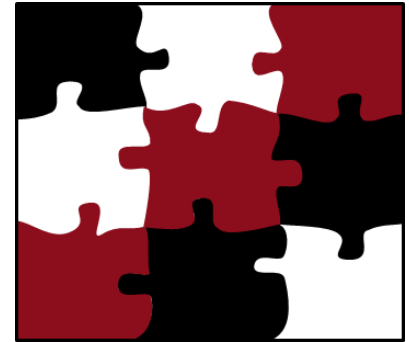
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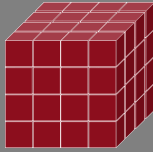


**Budgeting, Planning &  
Forecasting Software Sales  
& Implementation**



**Corporate FP&A Services**

# Our Services: Budgeting, Planning & Forecasting / CPM Software Implementation



## About Our CPM Software Implementation Services

- Abacist Group partners with a variety software companies to implement budgeting, planning, and forecasting solutions.
- The implementation of CPM software is heavily focused on the strategy & operations of your company and planning process. We translate your business requirements into effective planning tools.

## The CPM Software Solutions We Deliver:

### Adaptive Planning

- The leading Cloud based budgeting, planning & forecasting application
- Abacist Group is a 3 time winner of Adaptive Planning's Top Partner Award
- Adaptive Consolidations and Adaptive Intelligence augment the Adaptive Planning budgeting solutions

### Oracle/Hyperion Planning

- Pioneer of Enterprise Planning applications
- Leverages power Essbase OLAP engine

### Host Analytics

- SaaS CPM application that includes a variety of functionality from Strategy Maps to SKU level revenue planning

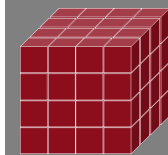
### Prophix

- On-premise CPM software can be implemented at a fraction of the cost of major one-premise CPM solutions

### Custom Excel based Solutions:

- Activity & Driver Based Planning & Forecasting Models
- Discounted Cash Flow Valuation Models
- Dashboards and Flash Reports
- Macro-driven Corporate Performance Management Tools

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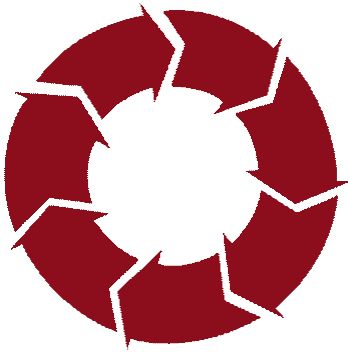
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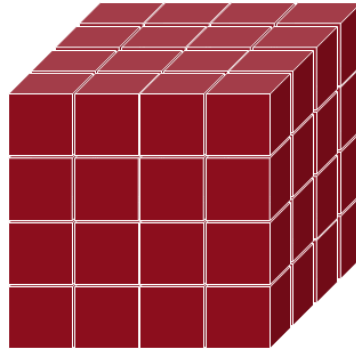
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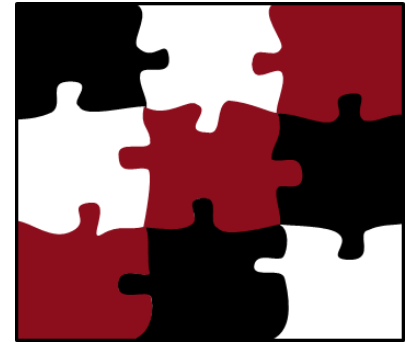
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**Corporate FP&A Services**

# Our Services: Corporate FP&A Services



## **M&A, Divestiture and Business Development Support**

- Financial Analysis and Model Development
- Deal Scoping and Evaluation
- Strategy Development
- Integration Support

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## **Creation and Implementation of Models and Tools**

- Provide Business Thought Leadership for CPM, Budgeting and Planning Software Implementation
- Creation of Excel-Based Models & Tools
- Coach and Train In-House Personnel on Best Practices for Leveraging Tools

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## **Pricing Analysis and Trade Promotion Management**

- Analysis of Existing Pricing Strategy
- Analysis of Pricing vs. Competition
- Optimize Pricing for Highest Profitability and Long-Term Brand Management
- Develop Strategy and Tools for Effective Trade Promotion Planning

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## **Financial and Economic Analysis**

- Develop Insights from Economic and Financial Analysis to Aid Action-Planning and Drive Decisions

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## **Interim and On-Demand FP&A Staff**

- Flexible FP&A Staff Augmentation services
- Interim FP&A Executives
- Fractional and On-Demand Financial Analysts

# Our Leadership



## **Bill Aiken**

Principal & CEO,  
Founder

### Education

- MBA, McCombs School of Business, The University of Texas at Austin
- B.A. Economics, Washington & Lee University

### Personal

- Bill lives in McKinney, Texas, with his wife and three sons

- **Principal & CEO, Founded Abacist Group in 2007**
- **Prior to Abacist Group, 10 year career with PepsiCo -- last role was Finance Director PepsiCo Grocery**
  - **Led CPM process for PepsiCo's largest sales channel, Strategic Grocery (\$7 Billion); helped accelerate quarterly sales growth 600% from .8% to 4.8% while expanding profit margins**
  - **Helped grow Frito-Lay's sales at Walmart from \$1.3 to \$1.7 Billion by leading team's FP&A processes -- contributed nearly half of Frito-Lay's revenue growth**
  - **Helped develop the corporate Annual Operating Plan & Strategic Plan & evaluate M&A opportunities**
- **Prior to PEP: Nortel, Accenture, Great North American Companies**

# Some businesses Abacis Group has helped





# Our Experience: By Service

## Corporate Performance Management

### **Account Planning and Forecasting Tools for a Multi-Billion Dollar Consumer Goods Client**

Our client lacked a consistent process and platform for planning its national and regional sales activity for retailers like Wal-Mart, Kroger, Safeway and Publix. Abacist Group built an activity-based planning & forecasting tool to be used by our client's geographically distributed sales and finance teams.

The tool helped ensure that the 100+ end-users followed a consistent and analytically sound process for planning and optimizing their account activity. The tool identified opportunities to maximize investments in promotional trade spending enabling accelerated net sales growth for both our client and its customers.

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## Business Transformation

### **Pricing, Net Revenue and Trade Promotion Management Optimization**

Our consumer staples client offered a collection of national and regional brands. They also supplied private label products for key retailers. However, over the course of many years, their investment in their underlying technology infrastructure to monitor, manage, and execute pricing and trade promotions had waned. As a result, they had also allowed their pricing strategy to devolve, and thus it lacked consistency and efficacy – particularly when dealing with retailers that had a national footprint.

We helped identify key people, process, and technology gaps that prevented our client from leveraging their pricing and trade promotions as a competitive advantage to grow market share, profitability, and cash flow. We recommended a series of phased key initiatives to help them close their capability gaps, and helped them manage the project deliverables for a sub-set of these key initiatives.

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## Financial Advisory Services

### **Performance Benchmarking for a Fortune 100 Consumer Packaged Goods Client**

The client's financial planning & analysis group hired Abacist Group to conduct a performance benchmarking analysis. The analysis validated for the Board of Directors that the client had performed strongly across a variety of metrics relative to a peer group of 20 other publicly traded companies.

# Our Experience: By Client Type

## Consumer Packaged Goods

### **CPM Software Implementation for One of the Nation's Largest Dairy Companies**

Years ago, our client had implemented expensive on-site CPM software. They were also using error-prone spreadsheets for their planning and forecasting process. They were looking to update their CPM software solution with a newer, more flexible, and more affordable solution that could be managed by finance staff without the involvement of their IT department, and at the same time rid themselves of the headaches of planning with Excel in a large organization. Abacist Group led the successful effort for the client's Adaptive Planning CPM Software-as-a-Service implementation. They now have time to analyze their business rather than simply manage a myriad of spreadsheets.

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## Health Care

### **Development of M&A and Deal Screening tools**

Our client was in a slowly, but steadily growing industry. They were one of the largest players in their extremely fragmented industry, and realized that they needed to perform a series of tuck-in acquisitions and joint ventures in order to reach their strategic plan's goals.

Due to the volume of deals they would be scoping with a relatively small business development team, they needed a very efficient process for scoping the many M&A and JV opportunities available. Abacist Group designed and built tools to help them evaluate deals quickly, efficiently, and consistently.

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## Professional Services

### **Organization Re-alignment for Professional Services Firm**

Abacist Group developed activity-based economic analysis of the various "cells" that made up the professional services organization. We were then able to identify areas of superior performance and areas of poor performance. Since most of the client's resources were people related, we then re-created a clean-slate org chart that took into consideration the economic contribution of each cell. Then we designed more robust business processes to help the newly drafted organization run efficiently. With this overhaul complete, the company's profits increased dramatically.

# Our Company: Core Values

## • Sustainability & Stewardship

- Means that we will operate in a manner that constantly asks “what is the best long-term use of our resources?” especially as it relates to:
  - Our Environment
  - Our People
  - Our Capital
- 10% of Operating Profit donated to help the poor



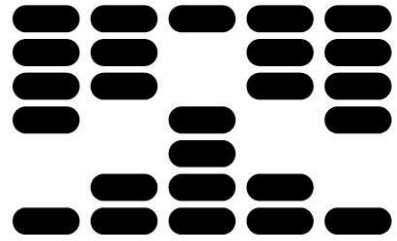
## • Resourcefulness & Flexibility

- Encourage us to take creative approaches in developing solutions, realizing that “one-size-fits-all” approaches often fail to meet our clients’ and our associates’ needs

## • Honest & Integrity

- Simply stated, we have a zero tolerance policy for lying, cheating or stealing; while it is stated simply, this is our principal value and as such serves as a touchstone to guide us during situations where our values may be in conflict

# Contact



**ABACIST**  
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**To learn more contact or have us help  
with a project:**

**Bill Aiken**

**[bill.aiken@abacistgroup.com](mailto:bill.aiken@abacistgroup.com)**

**Direct: 214-850-3929**