

## Host Analytics Health Check

Understand your **CPM functionality** and its relation to your **finance cycle**. With a **good health check you will start realizing more value** from your Host Analytics CPM investment.

Your organization made the smart strategic decision to deploy Host Analytics Corporate Performance Management (CPM). It already helps you make sound financial decisions based on consistent data and analysis. It enables you to track effectiveness of your financial processes, monitor the performance of individuals and identify areas for improvement.

But business conditions change, both inside your organization and in the world outside. There are more ways you can benefit from the rich environment of Host Analytics CPM. That's why we recommend an Application Health Check.

The Health Check is based on a training methodology developed by our highly knowledgeable finance and application professionals. Led by senior consulting experts with deep experience of using Host Analytics CPM in real-world situations, it consists of a 20-point checkup that covers fundamental aspects of the software, including data integration and data loading processes, dimension structures, reports, modeling, template design and many others.

### When Do You Need a Health Check?

Look at what has gone on since your organization adopted Host Analytics CPM, and ask the following questions:

- Have you used the solution for more than six months and in at least two budgeting, forecasting and consolidation cycles?
- Have any of your business processes been changed or adapted?
- Has there been a significant change, such as expansion or turnover, in your user base?
- Has there been substantial merger and acquisition activity?
- Are there additional processes you need to automate? Consider these possibilities:
  - We started with budgeting. Now we need consolidation or forecasting.
  - We started with consolidation. Now we need management reporting.
  - We started with management reporting. Now we need XBRL skills.
- Do you need to incorporate external data in any of your financial processes?

If you answer Yes to any of the above, now is probably a good time to order a Health Check and start realizing more value from your Host Analytics investment. Here's what your checkup will include.

### 20 Points of the Application Health Check

Our consulting experts will take your team through each of the following aspects of your Host Analytics CPM application and its relation to your finance cycle, examining each in detail and arriving at answers that enable you to take full advantage of the software's rich functionality.



## 20 Points of the Application Health Check

1	Dimensions – Do you have the correct number?
2	Dimensions – Do you need additional reporting structures?
3	Are you still using manual load processes?
4	Are you taking advantage of data load rules?
5	Is Boomi integration automation a good option for you?
6	Are you getting the most from Host Analytics' pre-built templates or modules?
7	Do your templates leverage new designs for line and block templates?
8	Are you leveraging template performance improvements?
9	Are you leveraging the reports correctly?
10	Are you using substitution variables?
11	Are you interested in doing rolling forecasts?
12	Is it a struggle to create the period-end report package?
13	Do you bring external content into reports?
14	Do you want to automate updates of currency rates?
15	Do you want to automate updates of tax rates (FICA, FUTA, SUTA)?
16	Are user roles configured correctly for security?
17	Are you leveraging report security?
18	Are you leveraging dimension security?
19	Are you leveraging workflow security?
20	Do you need additional training?

When your team completes the Application Health Check, it won't be long until you see these and other results:

- A more streamlined application
- A more efficient planning and reporting process
- Better satisfied, more productive users

### The Health Check Process

The program follows a few simple steps. Here's how it works:

- First, order your Health Check. As a Host Analytics customer, you can use MVP points your organization has accrued.
- Second, schedule the engagement. Our consulting experts are ready to serve you.
- Third, on completion of the Health Check, you receive a formal report outlining areas that can be improved.
- Then, according to your needs, we can follow up with proposals for any of these possibilities:
  - Further consulting
  - Targeted user training
  - Process re-engineering through one of our partner resources

The Host Analytics CPM Application Health Check is specially designed to give you easy access to the full range of our software's functionality. Please consider how you can profit from this hands-on experience: You'll elevate your execution of key processes, improve your financial decision-making and gain an edge on the competition. Don't wait to take this easy but important step. For more information, contact [services@hostanalytics.com](mailto:services@hostanalytics.com).

**hostanalytics**  
— decide