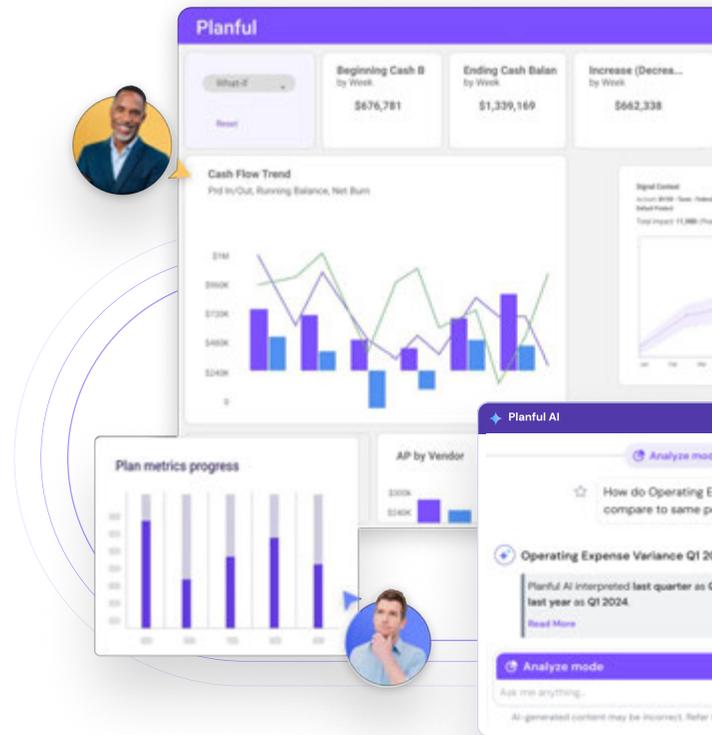


# One Platform For Planning, Consolidations, Reporting, and Analysis

Planful streamlines how you work so you can focus on driving the business forward.

Healthcare organizations thrive on innovation and agility to bring medical breakthroughs to market. But heavy R&D investment, unpredictable trial costs, and regulatory complexity create constant pressure on Finance to deliver accurate plans, forecasts, and reports while aligning researchers, operations, and leadership.

Planful streamlines all of your financial planning, reporting, and consolidations on one end-to-end platform. With trusted AI, automation, and finance-first design, life sciences organizations gain visibility, streamline clinical and project planning, and scale with confidence.



## How Planful Helps Healthcare Succeed

### Operate with Agility

Adapt quickly to uncertainty with driver-based models and rolling forecasts. Run scenarios for trial budgets, regulatory timelines, and R&D investments to manage risk and opportunity.

### Collaborate Across the Business

Unify Finance, Clinical, R&D, Operations, and HR teams with shared workflows and integrated assumptions to drive collaboration from the lab to leadership.

### Turn Reports into Action

Replace disconnected spreadsheets with a single source of truth across planning, reporting, and consolidation. Deliver accurate insights by trial, program, or grant to guide strategy and compliance.

### Manage Trials Confidently

Create flexible budgets, manage and analyze grants, and forecast trial expenses. Adjust planning processes in real time to ensure compliance and reduce surprises.

### Streamline Consolidations

Automate reconciliations, adjustments, and consolidations across subsidiaries, trials, and research programs. Shorten close cycles so teams have more time for strategic guidance and resource planning.

### Elevate Teams with AI

Surface anomalies, generate forecasts, and create narrative summaries instantly. Empower finance and scientific leaders to detect risks early, optimize resources, and act with impact.

Trusted by Thousands of Customers



# Why Teams Like Yours Trust Planful



## Finance-Owned Control & Compliance

Provides transparency to manage grants, revenue recognition, and regulatory requirements with full auditability.



## Scalable Without Limits

Supports rapid growth, IPO preparation, and global expansion without added complexity.



## High Adoption Across Finance & R&D

Real-time collaboration between Finance, Clinical, and Operations ensures alignment across trials and business units.

## Comprehensive Solutions for Every Corner of Finance

### Project and Trial Planning

- Build flexible budgets and forecasts for clinical trials, grants, and programs.
- Model approval probabilities, enrollment rates, and cost scenarios.
- Adjust assumptions as funding and compliance requirements evolve.

### Consolidations

- Handle revenue recognition for licensing deals, milestone payments, and royalties.
- Manage complex ownerships with full transparency.
- Simplify multi-GAAP and multi-currency reporting to support global operations.

### Modeling

- Build flexible, driver-based models for research, clinical, or commercial operations.
- Run what-if scenarios to assess funding impacts or trial enrollment shifts.
- Forecast outcomes and financial impacts with dynamic projections.

### Integrations

- Connect seamlessly with ERPs, CRMs, HRIS, clinical trial systems, and BI tools.
- Eliminate manual data wrangling with pre-built connectors and automated updates.
- Maintain accuracy and consistency across financial and research systems.

### Planful AI

- Automate repetitive tasks so finance and R&D teams can focus on innovation.
- Surface cost risks and highlight budget pressures.
- Explain variances across programs, trials, and funding sources to ensure compliance.

### Workforce Planning

- Align HR and Finance on staffing and compensation across labs, trials, and programs.
- Plan by role, project, or department to optimize research and operational efficiency.
- Balance scientific capacity with financial sustainability.

## You're Always in Good Company



Planful gives me confidence in the numbers without the risk that someone copied actuals or other data incorrectly. Now we have the agility and flexibility we need to deal with whatever happens. I'm confident in Planful and that it can scale alongside our business."

Gary Collins, VP of Finance, Apollo Therapeutics



## See Planful in Action

Ask your Planful rep for a personalized demo and discover how we help the Office of the CFO move from reactive to strategic with speed, scale, and confidence.

[Get in touch](#)