



insightsoftware

A comprehensive suite of connected solutions for financial reporting, EPM, and FP&A for the Office of the CFO.

<https://insightsoftware.com/>

Overview

insightsoftware is a global provider of connected solutions designed for the Office of the CFO, encompassing Financial Reporting, Enterprise Performance Management (EPM), and Financial Planning & Analysis (FP&A) solutions. The platform is built on an advanced data virtualization layer, connecting to over 200 major ERP, data warehouse, and cloud environments with pre-built content and logic, ensuring real-time data access and a single source of truth for financial and operational data.

Key benefits include automating manual and siloed planning processes, boosting productivity, minimizing risk, and enabling leaders to make timely and informed decisions. The software features Lineos, an AI-powered component, to deliver trusted insights and increase predictability.

Main Features and Capabilities:

Real-Time Data Integration: Seamlessly connects to 200+ data sources, including major ERP systems, to provide up-to-date financial insights.

Advanced Financial Reporting: Delivers comprehensive, customizable reporting capabilities, often working directly within Microsoft Excel via an add-in (e.g., Spreadsheet Server) for a familiar user experience.

Budgeting & Planning: Streamlines and automates budgeting, forecasting, and scenario modeling processes with integrated planning across the organization.

Financial Close & Consolidation: Accelerates the financial close process and ensures accuracy and compliance for regulatory and internal disclosure documents.

Embedded Analytics: Provides self-service analytics and reporting that can be embedded inside other applications (e.g., Logi Symphony).

Target Users and Use Cases: insightsoftware is primarily designed for finance, accounting, and operations teams within mid-sized to large organizations (Mid-Market and Enterprise). Use cases span

the entire financial lifecycle, from daily operational reporting and month-end close to long-term strategic planning and regulatory compliance across diverse industries, including healthcare, manufacturing, and financial services.

Key Features

- Real-Time Data Integration (200+ sources)
- Financial Planning & Analysis (FP&A)
- Budgeting, Forecasting, and Scenario Modeling
- Advanced Financial Reporting (Excel-based)
- Financial Close and Consolidation
- Embedded Analytics and Business Intelligence
- AI-Powered Insights (Lineos)
- Regulatory and Narrative Reporting

Pricing

Model: enterprise

Pricing is quote-based and not publicly disclosed, tailored to the organization's specific ERP integrations, number of users, and the suite of solutions required. Potential users can request a free demo or a trial for specific products.

Target Company Size: medium, enterprise

Integrations

SAP, Oracle, Microsoft Dynamics, NetSuite, Deltek, Sage, Power BI, Qlik

Compliance & Certifications

SOC2, ISO 27001, GDPR, CCPA

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