

Tech-Driven Finance: Empowering Business Support and Growth

Keren Herscovici
CFO @ Panorays

OUR VISION

**The fastest and easiest way
for companies to securely
do business together**





Figure 1: Top Cybersecurity Trends for 2024

Top Cybersecurity Trends for 2024

⚡ Optimizing for Resilience	⚙ Optimizing for Performance
<ul style="list-style-type: none">• Continuous Threat Exposure Management• Extending IAM's Cybersecurity Value• Third-Party Cybersecurity Risk Management• Privacy-Driven Application and Data Decoupling	<ul style="list-style-type: none">• Generative AI• Security Behavior and Culture Programs• Cybersecurity Outcome-Driven Metrics• Evolving Cybersecurity Operating Models• Cybersecurity Reskilling
Optimized Cybersecurity Programs	

Source: Gartner
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Agenda

- Automation and tools in the day-to-day operations
- Technologies used in finance to support the business
- Management / board perspective

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Real Time Visibility (Commission Dashboard)

AEs

Channels

Sales Dev

REPORTING_DATE

Previous quarter

Summary (AEs)

Opp Owner

Quota

New Business ARR \$

Upsell ARR \$

ACV \$

Up for Renewal ARR \$

Up for Renewal Opps

Renewed ARR \$

Renewed Opps

Renewal Rate

New & Upsell ARR \$ (Won)

Weighted New ARR \$

Achievement %

Detailed Report (AEs)

Reporting ...

Last 4 months

Opp Owner

Opp Name

PayQuicker - Renewal

SQLs per Rep

Month of Reporting Date

January 2024

February 2024

March 2024

Opp Sdr Assign..

Scheduled Calls per Rep

Month of Reporting Date

January 2024

February 2024

Op Created By

SQLs per Rep (Details)

Opp Sdr Assigned

Op Name

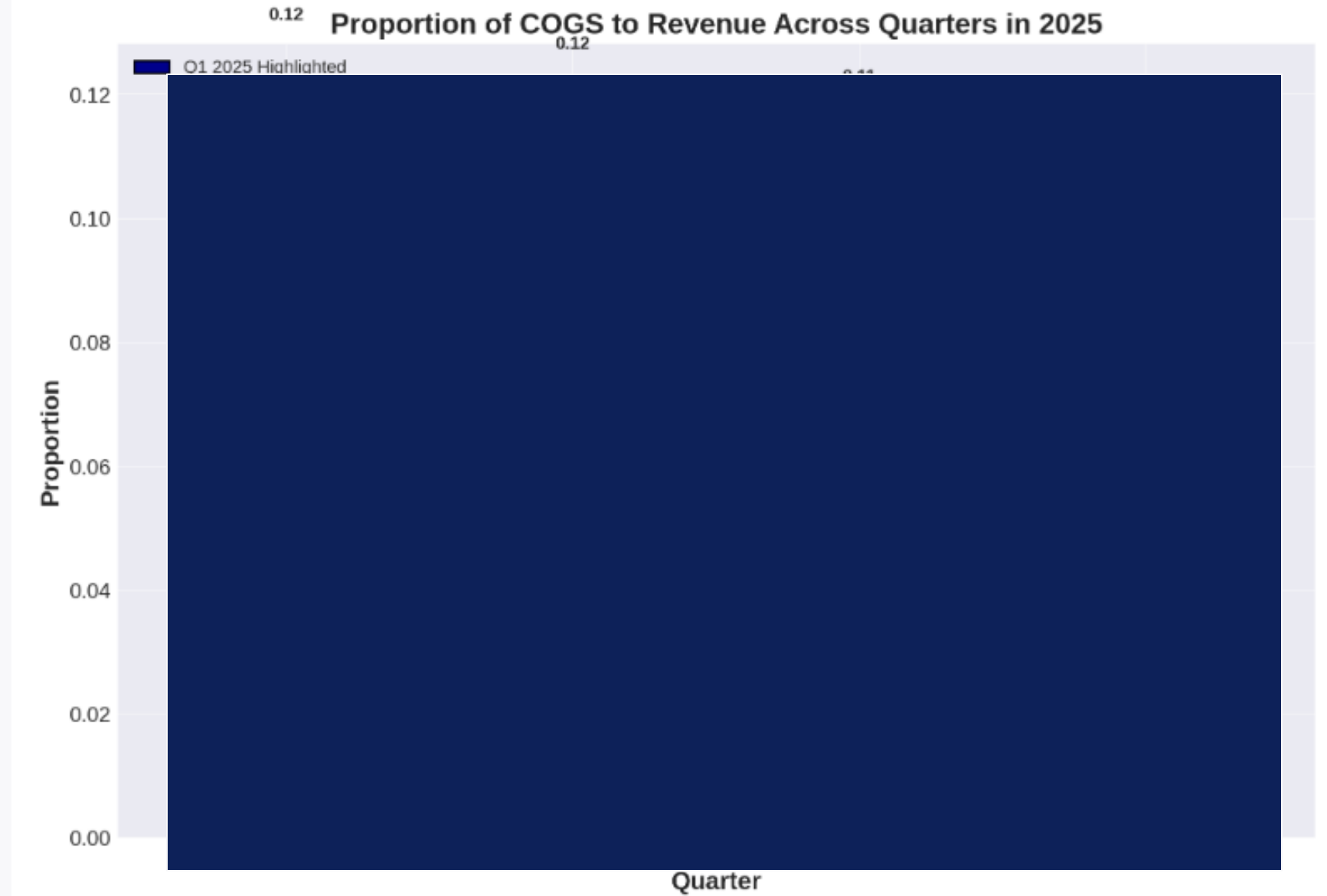
Opportunity Owner

Reporting Date

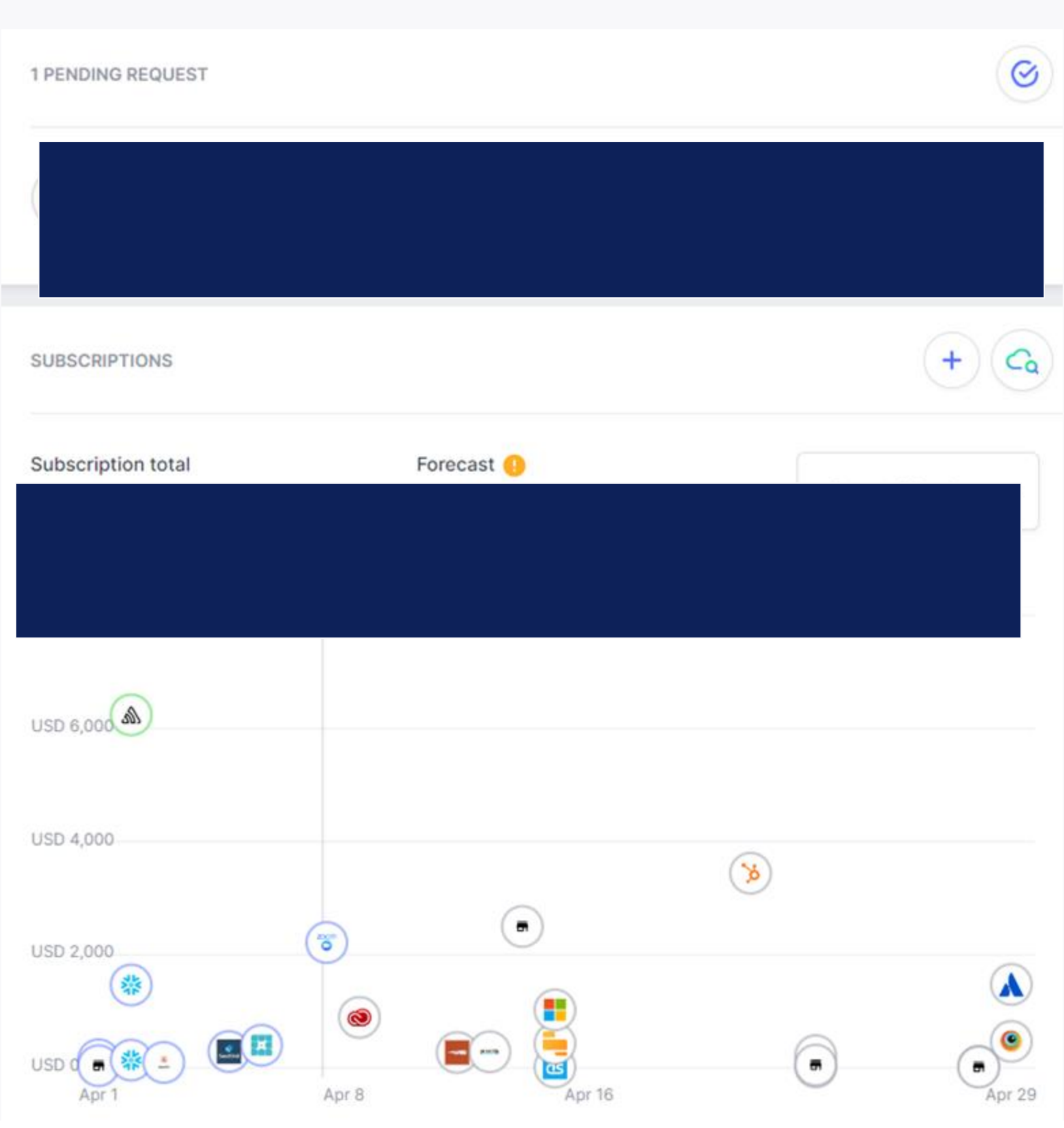
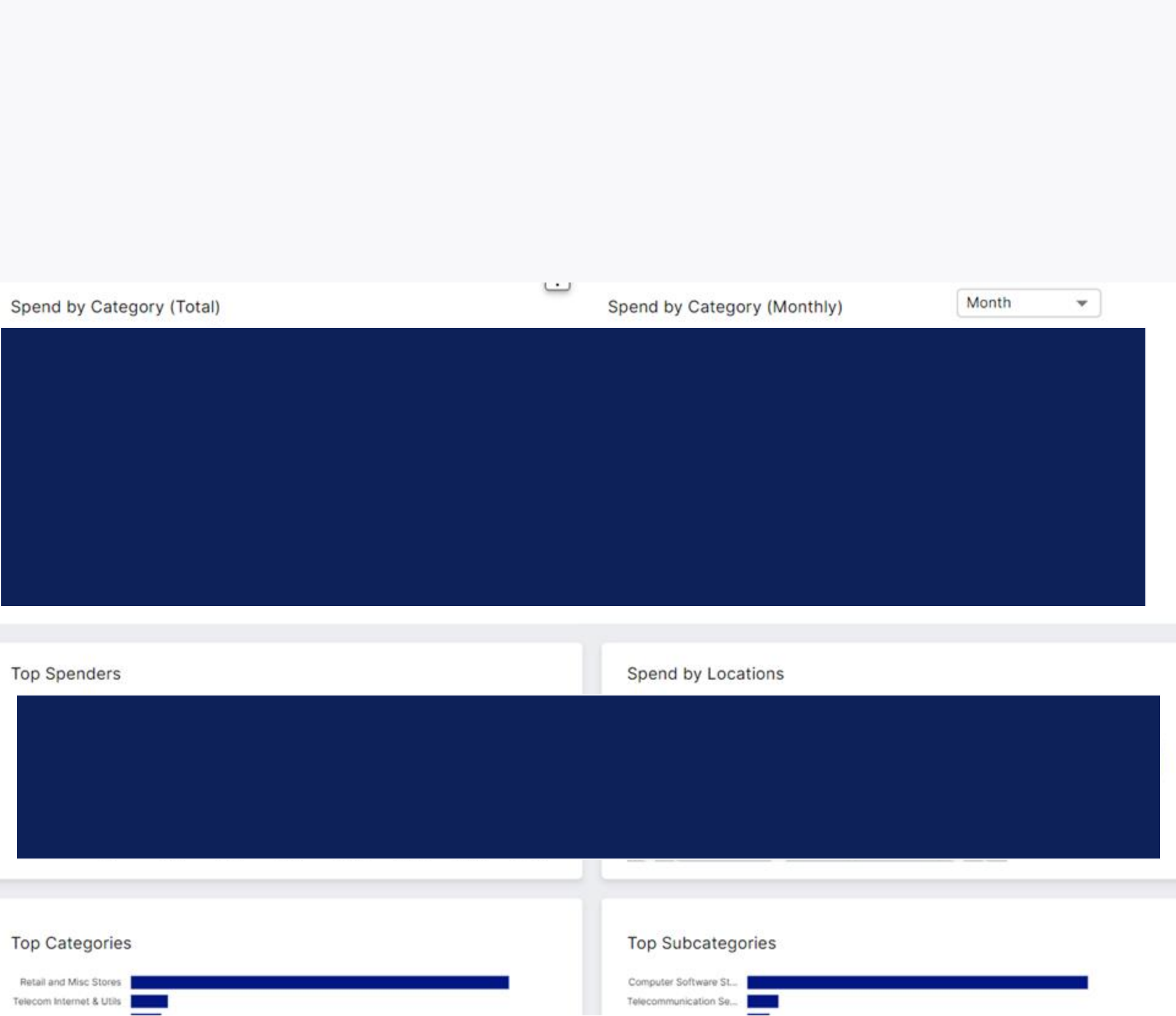
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Scheduled Calls per Rep (Details)

AI for Predictive Analytics (Data Analyst by Chat GPT)



Automated Expense Management (Mesh)



Real Time Budget Tracking

Goal: to be able to track, forecast and review monthly budget spend with budget owners

How:

- by connecting NetSuite with Tableau
- by tracking expenses to ensure it's allocated to the correct budgets
- by using actuals to better predict quarterly budget spend

Result: this allows & the budget owners to closely monitor where their spend is versus the plan

Parent D..	Departm..	Parent Account nam..	Budget - Updated (Full)			Actual \$			BvA Balance - Full		
			2023 Q3	2023 Q4	2024 Q1	2023 Q3	2023 Q4	2024 Q1	2023 Q3	2023 Q4	2024 Q1
COGS	Cogs	Allocation	101,053	101,053	105,731	101,033	60,737	101,105	42,010	45,155	41,595
		Other									
		Cloud expenses									
		Subcontractor fees ..									
		Subscriptions and T..									
		Total									
	Support	Allocation									
		Benefits/Salaries									
		Training									
		Total									

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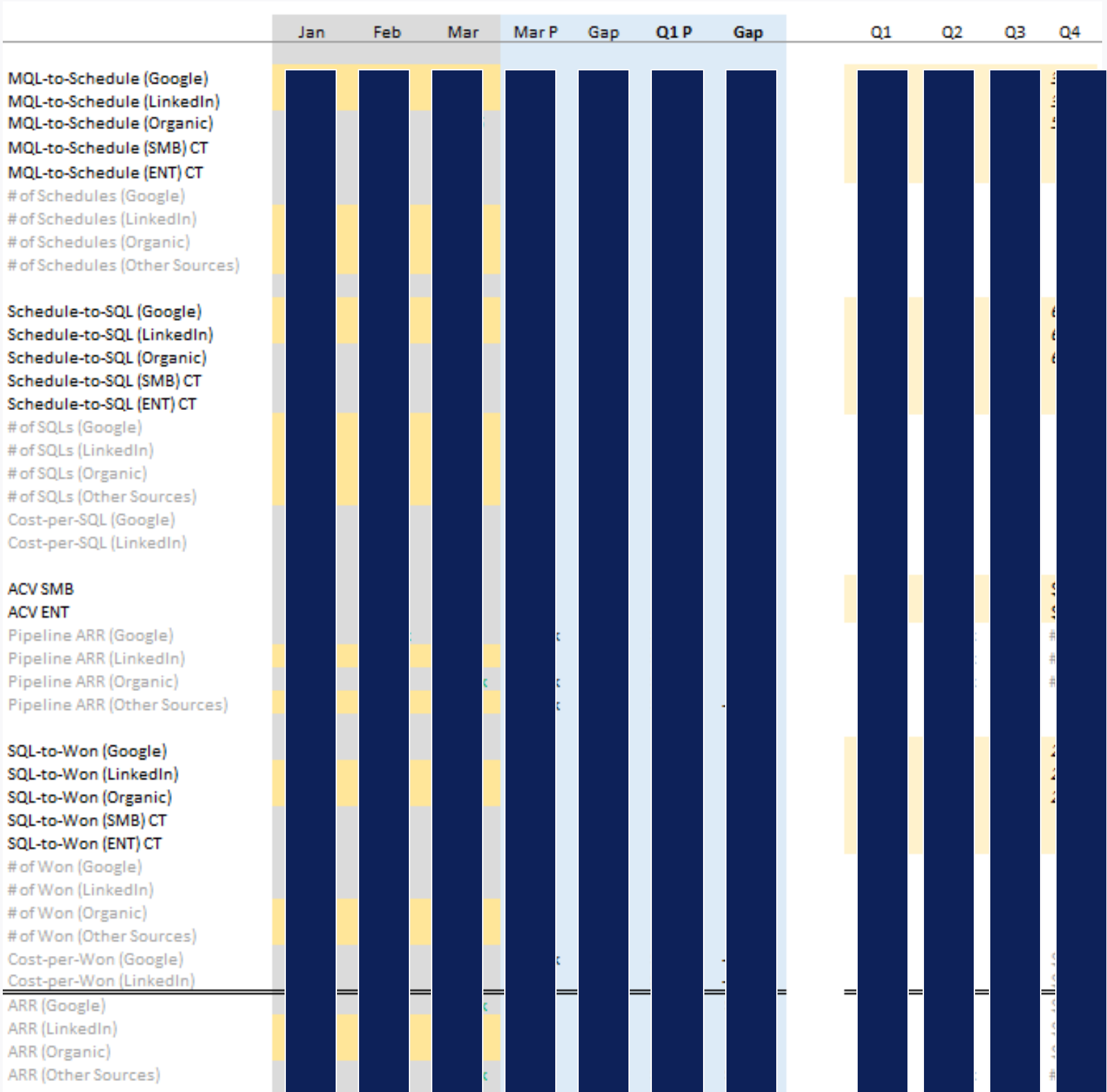
Supporting Departments in Areas of Focus

Goal: to track conversion rates & quantities delivered at each funnel stage in order to be able to focus management & owner attention on areas that need improvement quickly

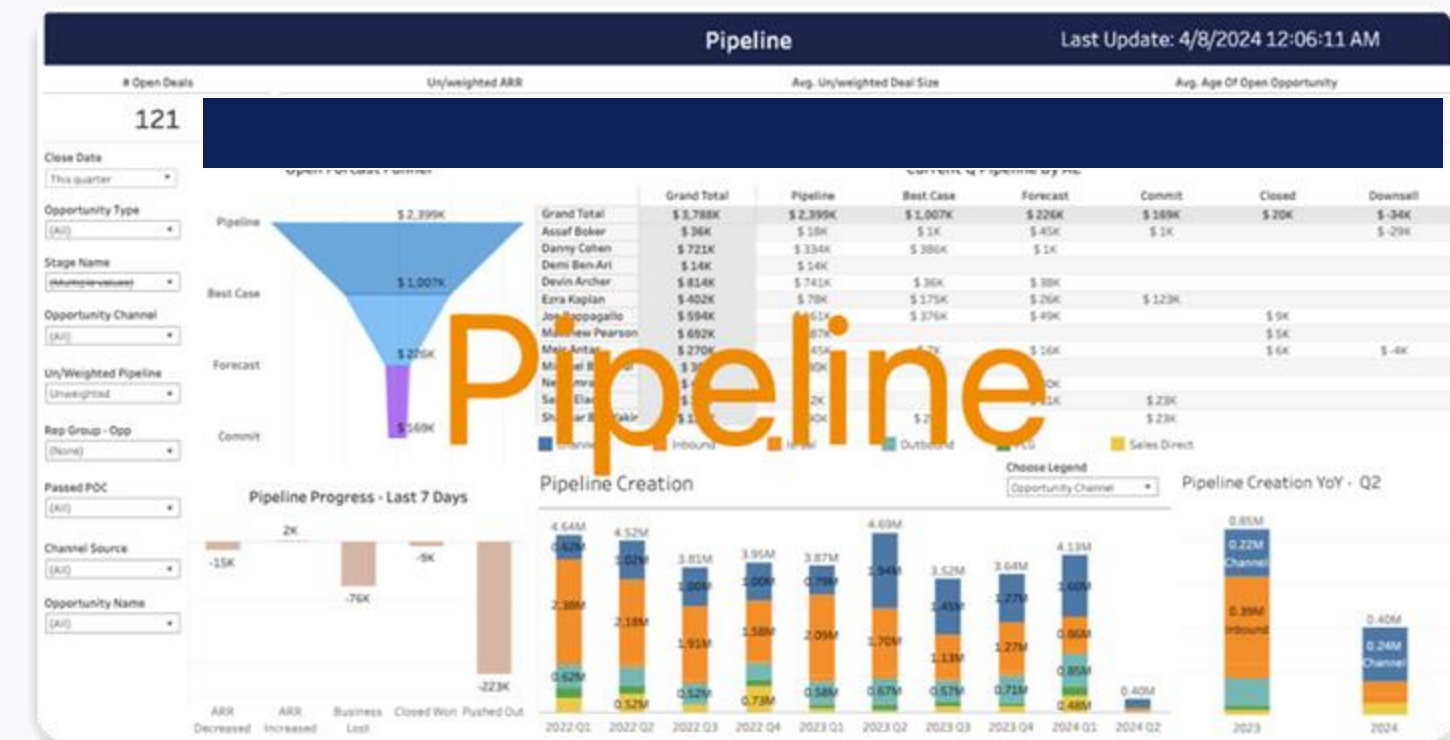
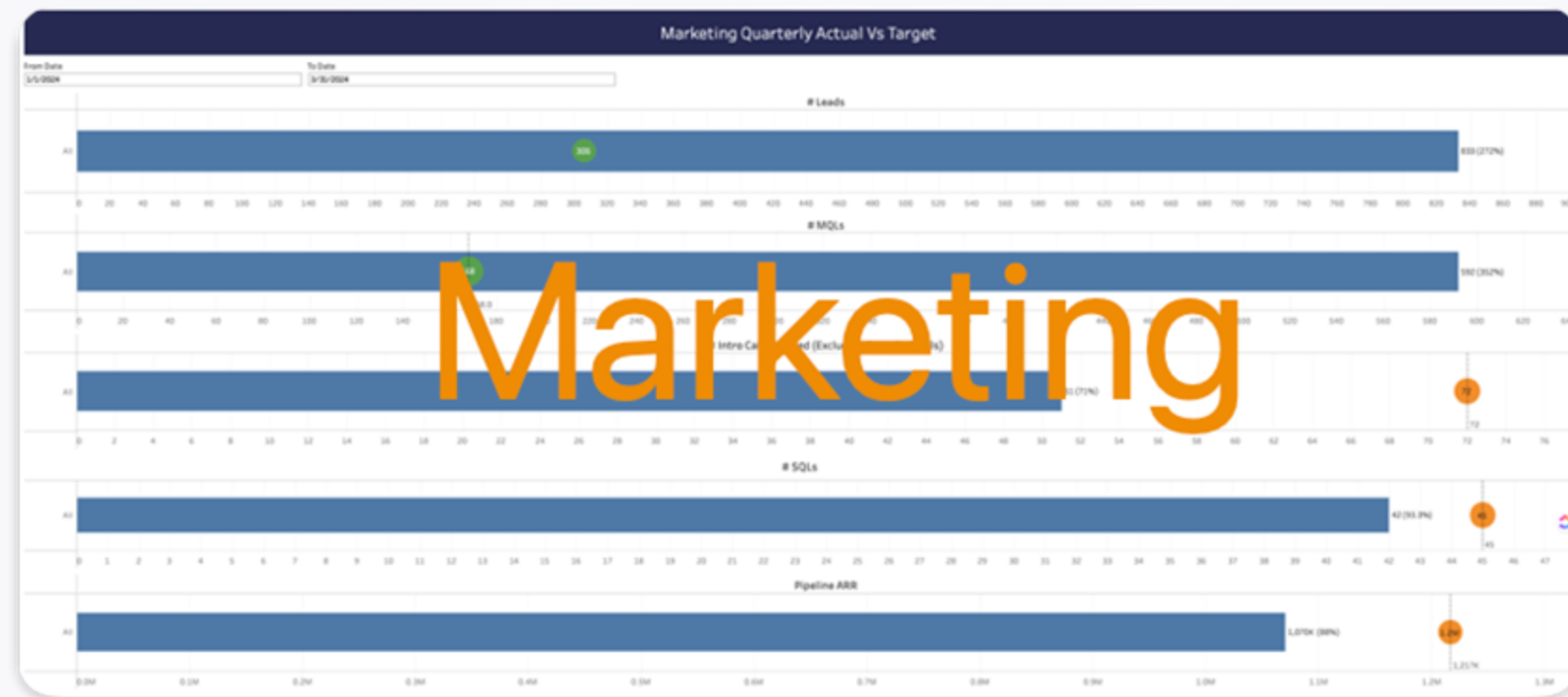
How:

- track each funnel stage across each revenue stream
- structure according to areas of interest (ex. inbound > lead source, partners > region, etc.)
- identify underperforming areas monthly, and drill down into these areas via analysis
- work with GTM owners in order to improve these KPIs during the quarter
- dynamically adjust forecasted ARR according to updated assumptions

Result: this allows us to tackle problem areas as they arise and forecast the estimated impact on overall ARR



Data Analytics- KPIs Tracking



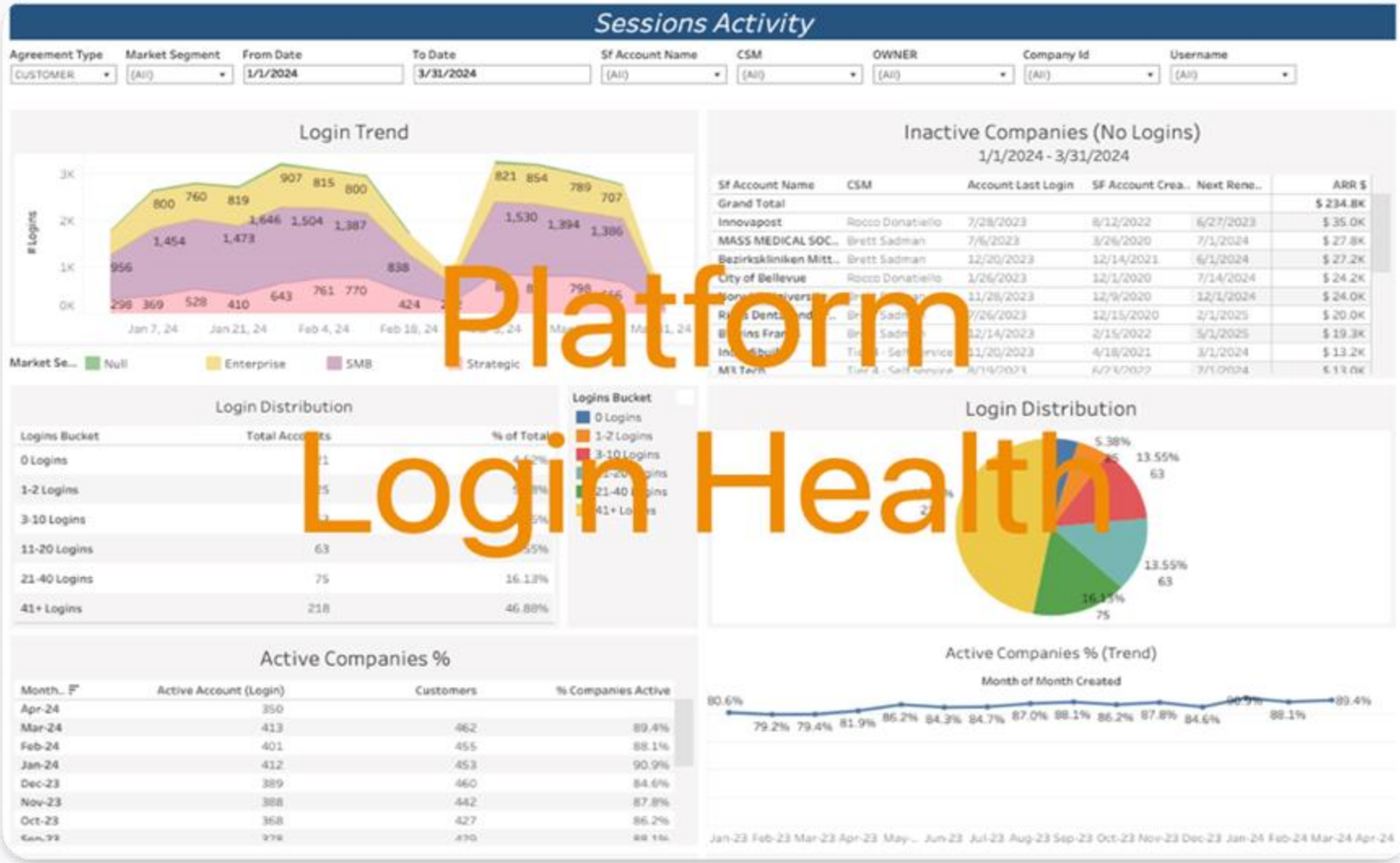
Data Analytics- KPIs Tracking

Sales to Customer Success



Data Analytics- KPIs Tracking

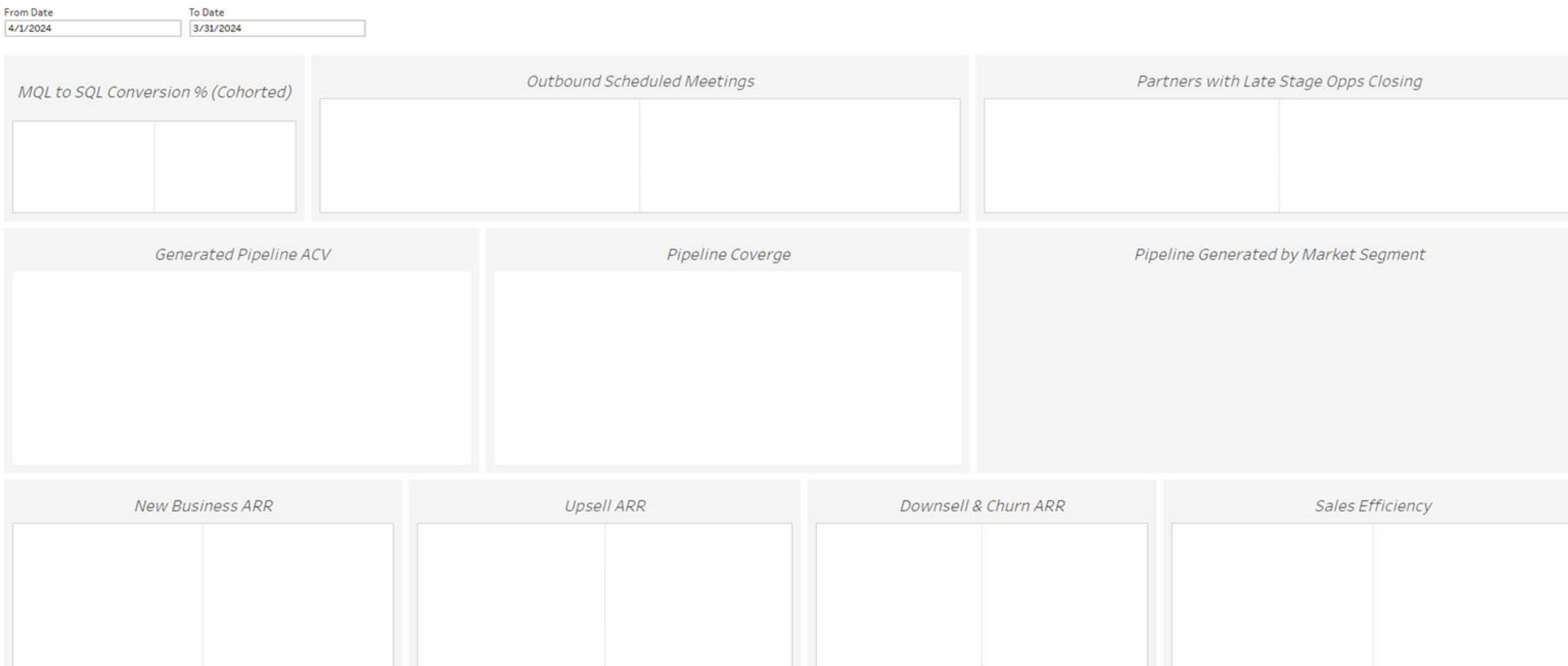
Product KPIs



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Management Dashboard



Board Dashboards



OKR structure

The purpose:

- Provide a clear objective to the company that will express the priority and expectations to achieve it
- Explain how the process should take shape, which projects and initiatives need to happen, how we will tracking and how it fits into performance reviews
- Data to support decision making, tracking, alignment, transparency

Objective definition

- Memorable, clear, qualitative, inspirational, broad.
- 3 to 4 objectives



Key-results definition

- 2 KRs per Objective
- Qualitative & Quantitative
- Should express the Objective target

Initiative
Project and task list

Initiative - Process & Timelines



Key-Results

- Setting KRs for the objective



Projects & Tasks

- Meet with stakeholders
- Define projects for the success of the initiative



Collaboration & Transparency

- Contributors round table to align on deliverables & milestones



Tracking & Reporting

- Company-wide dashboard
- Follow-up meetings
- Milestones & stop/loss procedure

Plan of Action

Enterprise Deals OKR

OBJECTIVE	Drive new business growth by strategically focusing on enterprise and strategic accounts									
PROJECT OWNER	Sergio Nesti									
PROJECT SPONSOR	Allan Elliot									
KEY RESULT	Drive	in enterprise and strategic					ACTUAL			
KEY RESULT	AC	strategic					ACTUAL			
WBS NUMBER	TASK TITLE	TASK OWNER	DUE DATE	STATUS	IMPACT	MILESTONE KPI	QUARTERLY TARGET	ACTUAL	NEXT STEP	
1										
1.1		Demi	6/30/24	In progress	10%	Hosting losses	0	0		
1.2		Einat	6/30/24	Not started						
2										
2.1		Sergio	3/31/24	Completed	18%	Pipeline				
2.2		Sergio	4/30/24	In progress						
2.3		Sergio	9/30/24	Not started						
3										
3.1		Alan	4/30/24	In progress	21%	Partners with late-stage opps	15	1		
4										
4.1		Giora	6/30/24	In progress	15%	Reporting losses	0	2		

Thank You.