

# Axiom Strategic Financial Planning

## Model Scenarios to Develop Mid- and Long-Range Financial Plans

Strata's Axiom™ Strategic Financial Planning enables higher education professionals to model multiple scenarios and develop mid- and long-term financial plans that are stress tested and aligned to strategic goals. With minimal data integration, the solution helps users quickly develop driver-based models, build GAAP-based financial statements, and deliver executive dashboards to communicate financial plans across the institution.

Colleges and universities rely on Axiom Strategic Financial Planning to:

- **Model effects of changing internal assumptions** — such as current and projected enrollment — and external factors, such as wage inflation and interest rates
- **Mix and match assumptions** and initiatives to compare different scenarios
- **Compare scenarios** side-by-side in a full financial statement view supported by key ratios
- **Generate forward-looking financial statements** based on the desired planning horizon
- **Deliver executive-level dashboards** with operational, financial, and third-party data

### Build Strategic Plans with Full Visibility into the Financial Impact

Axiom Strategic Financial Planning provides full visibility into the multi-year financial impacts of initiatives and scenarios based on the desired planning horizon. Users can generate forward-looking financial statements — including a full GAAP-based statement of activities, balance sheet, and cash flow statement — and can gauge how rating agencies will view plans.



### Create and Compare Unlimited Scenarios

With pre-set financial models and the ability to dynamically mix and match drivers, initiatives, and inputs, Axiom Strategic Financial Planning gives users the flexibility to create unlimited scenarios to compare alternatives and determine the best plan of action. Users can replicate drivers or even create multiple versions of each, while having full traceability to underlying assumptions, inputs, and planning methodologies of any line item.

Easily compare scenarios and create models on the fly to quickly address questions from institutional leaders and build consensus to move forward.

### Integrate Strategic Financial Plans into Your Annual Planning Process

Part of a unified platform, Axiom's Strategic Financial Planning solution enables institutions to leverage their long-term planning process to inform budgeting, capital planning, and tuition planning processes. The strategic long-term plan sets the framework for financial goals, funding thresholds, and various targets throughout your Axiom solutions.

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*"Axiom clarifies the management and board thinking about go/no-go decisions in projects, as well as the scale of the project."*

**Associate Vice President of Finance,**  
private university

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## Instant Results Through Dashboards and Visualizations

Axiom Strategic Financial Planning provides intuitive live dashboards that empower users to track KPIs and compare against benchmark data from peer institutions or Moody's targets. Users can also model impacts of debt issuances and resulting interest expenses, as well as capital impacts on depreciation. Reporting can easily feed into board-level packages and engage other key stakeholders with timely, accurate strategic and financial data.

Institutions can generate multiple reports on various dimensions of their strategic plans, including multi-year financial statements at both the university and school/unit levels, scenario comparison reports, school/unit breakout reports, and capital position analysis reports.

## Built on Industry Best Practices

Strata draws on decades of higher education experience to design Axiom Strategic Financial Planning, so customers adopt proven best practices and realize faster time to value. Our expert-guided implementation ensures quick and complete adoption and alignment with institutional requirements.

## Key software capabilities

- **Scenario Analysis Dashboard** supports on-the-fly scenario modeling by toggling on and off initiatives and changing driver sets.
- **Statistical Analysis Dashboard** allows users to flex operating statistics and view the impact to revenues and expenses in real time.
- **"What-if" analysis** helps users determine how revenues and expenses adjust in response to different scenarios.
- **Full GAAP-based financial statements** enable evaluation of the multi-year impacts of initiatives and scenarios.
- **Executive-level dashboards** enable real-time tracking of KPIs including debt, cash, and capital ratios.

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*"Axiom empowers us to answer 'what-if' questions much quicker and with confidence. UNT's most senior leaders rely heavily on Axiom data — and they trust it — to make critical financial and strategic decisions."*

**Paige Smith**, Associate Vice Chancellor for Budgeting, Planning, and Analysis, University of North Texas System

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