

Axiom Strategic Financial Planning

Model Strategic Initiatives, Compare Scenarios, and Plan with Confidence



Strata's Axiom™ Strategic Financial Planning enables financial institutions to evaluate long-term strategies, model strategic initiatives, and compare future scenarios with confidence. Designed specifically for executive and board-level planning, the solution helps institutions move beyond annual budgeting and short-term forecasting to understand the long-term financial impact of strategic decisions.

Many financial institutions rely on planning approaches that become increasingly difficult to scale as strategies evolve and business conditions change. Whether built in spreadsheets or other custom processes, these models often lack the transparency, flexibility, and governance needed to support confident long-term decision-making.

Axiom Strategic Financial Planning is a configurable, purpose-built platform for long-term strategic planning. With transparent assumptions, consistent methodologies, and outputs designed for executive and board-level decision-making, institutions gain the credibility and confidence needed to evaluate strategic initiatives, compare future scenarios, and spend more time advancing strategy than maintaining planning models.

Financial institutions rely on Axiom Strategic Financial Planning to:

- Build multi-year strategic plans spanning three to ten years
- Model strategic initiatives to evaluate their financial impact

- Compare multiple scenarios side-by-side to evaluate opportunities and risks
- Layer initiatives directly into baseline projections
- Assess the impact of changing market conditions and assumptions
- Support executive leadership and board-level decision-making

Move Beyond Forecasting to Strategic Decision-Making

Forecasting helps institutions understand how they are likely to perform in the near term.

Strategic Financial Planning helps institutions answer a different question:

**Where do we want to be in the future,
and how do we get there?**

Axiom Strategic Financial Planning is purpose-built for long-term strategy development, enabling finance and strategy leaders to evaluate opportunities, assess risks, and understand the financial implications of key decisions before committing resources. Institutions can model multiple paths forward, compare outcomes, and build confidence around strategic initiatives.

By connecting strategy to financial outcomes, institutions gain a clear, defensible view of future performance and the flexibility to adapt as conditions change.

Turn Strategic Ideas into Financial Outcomes

Strategic initiatives and priorities are constantly evolving. Whether evaluating expansion opportunities, acquisitions, capital investments, staffing strategies, or responding to changing market conditions, leaders need the ability to quickly understand their options. Yet many organizations struggle to quantify the long-term financial impact of these initiatives before decisions are made.

Axiom Strategic Financial Planning enables finance teams to model strategic initiatives as distinct business cases and evaluate their impact alongside baseline projections.

Examples include:

- Acquisitions and merger opportunities
- Branch expansion or consolidation
- Commercial lending team lift-outs
- New product launches
- Market expansion initiatives
- Technology modernization investments
- Staffing and organizational changes

By modeling initiatives independently and then layering them into strategic plans, institutions can better understand expected outcomes, compare alternatives, and align investments with long-term goals.

Evaluate Alternatives in Minutes, Not Days

Strategic planning is rarely a linear process. Executive teams frequently ask to evaluate new assumptions, compare alternatives, or understand the impact of changing market conditions.

Traditional spreadsheet models often require significant effort every time assumptions change, making it difficult to evaluate multiple paths forward.

Axiom Strategic Financial Planning enables institutions to quickly adjust assumptions, compare scenarios, and evaluate alternative strategies without rebuilding models.

Finance and strategy leaders can:

- Compare multiple strategic scenarios side-by-side
- Evaluate optimistic, pessimistic, and custom assumptions
- Toggle strategic initiatives on and off to assess impact
- Analyze alternative growth, investment, and risk scenarios
- Respond quickly to leadership and board requests

This flexibility allows organizations to move from static planning exercises to dynamic strategic decision-making.

"This solution would have been invaluable during our branch planning process. As scenarios and initiatives kept changing, it would have allowed us to quickly model pro forma ideas and layer them into our baseline projections without constantly rebuilding spreadsheets."

Director of FP&A at a Banking Institution

Replace Spreadsheet Complexity with a Modern Planning Platform

Many institutions rely on custom-built Excel models for long-range planning. While useful, these models often become fragile, difficult to maintain, and challenging to explain as complexity increases.

Axiom Strategic Financial Planning provides a configurable, purpose-built platform that improves transparency, consistency, and confidence in planning outputs.

Benefits include:

- Reduced dependence on complex spreadsheets
- Greater visibility into assumptions and methodologies
- Faster scenario creation and comparison
- Improved consistency across planning cycles
- Increased confidence in strategic planning outputs
- Modern user experience designed for planning and analysis

With a modern planning environment, institutions can spend less time maintaining models and more time evaluating strategy.

Built for Executive and Board-Level Planning

Strategic Financial Planning complements existing budgeting and forecasting processes by extending planning beyond annual cycles.

Institutions can leverage budget and forecast data as a foundation for strategic planning while maintaining a clear distinction between near-term operational planning and long-term strategic decision-making.

Together, budgeting, forecasting, and strategic financial planning create a comprehensive framework for managing both current performance and future growth.

Key software capabilities

- Multi-year strategic planning horizons supporting three-to-ten-year plans
- Strategic initiative modeling and business-case evaluation
- Driver-based planning for growth rates, interest rates, and strategic assumptions
- Reusable driver libraries that support multiple planning scenarios
- Side-by-side comparison of strategic alternatives
- Initiative layering on top of baseline projections
- Scenario comparison reporting and trend analysis
- Executive and board-level reporting outputs
- Configurable planning framework designed for financial institutions
- Modern spreadsheet-like user experience with transparent assumptions and calculations

Strategic Planning with Confidence

Axiom Strategic Financial Planning empowers finance and strategy leaders to move beyond reactive planning and develop a proactive, long-term view of institutional performance.

By combining strategic initiative modeling, scenario analysis, and multi-year planning in a modern platform, financial institutions can confidently evaluate opportunities, assess risks, and make informed decisions that support long-term success.