



Vena Copilot for FP&A

Unlock Productivity and Strategic Potential With the Only AI Assistant Purpose-Built for FP&A and CPM

Vena Copilot for FP&A is the only generative AI assistant purpose-built to empower FP&A teams and the organizations they support. Trained to provide industry-leading FP&A expertise, Vena Copilot works as an extension of your FP&A team, empowering organizations to revolutionize their financial planning and analysis processes end-to-end. By connecting financial and operational data with Microsoft's world-leading AI technology through Vena CubeFLEX™, Vena's centralized, multi-dimensional analytical database technology, Vena Copilot enables users to easily generate reports, analyze trends and answer complex business questions, enhancing productivity, accelerating decision making and allowing finance and operations teams to focus on strategic initiatives.



Highlights:

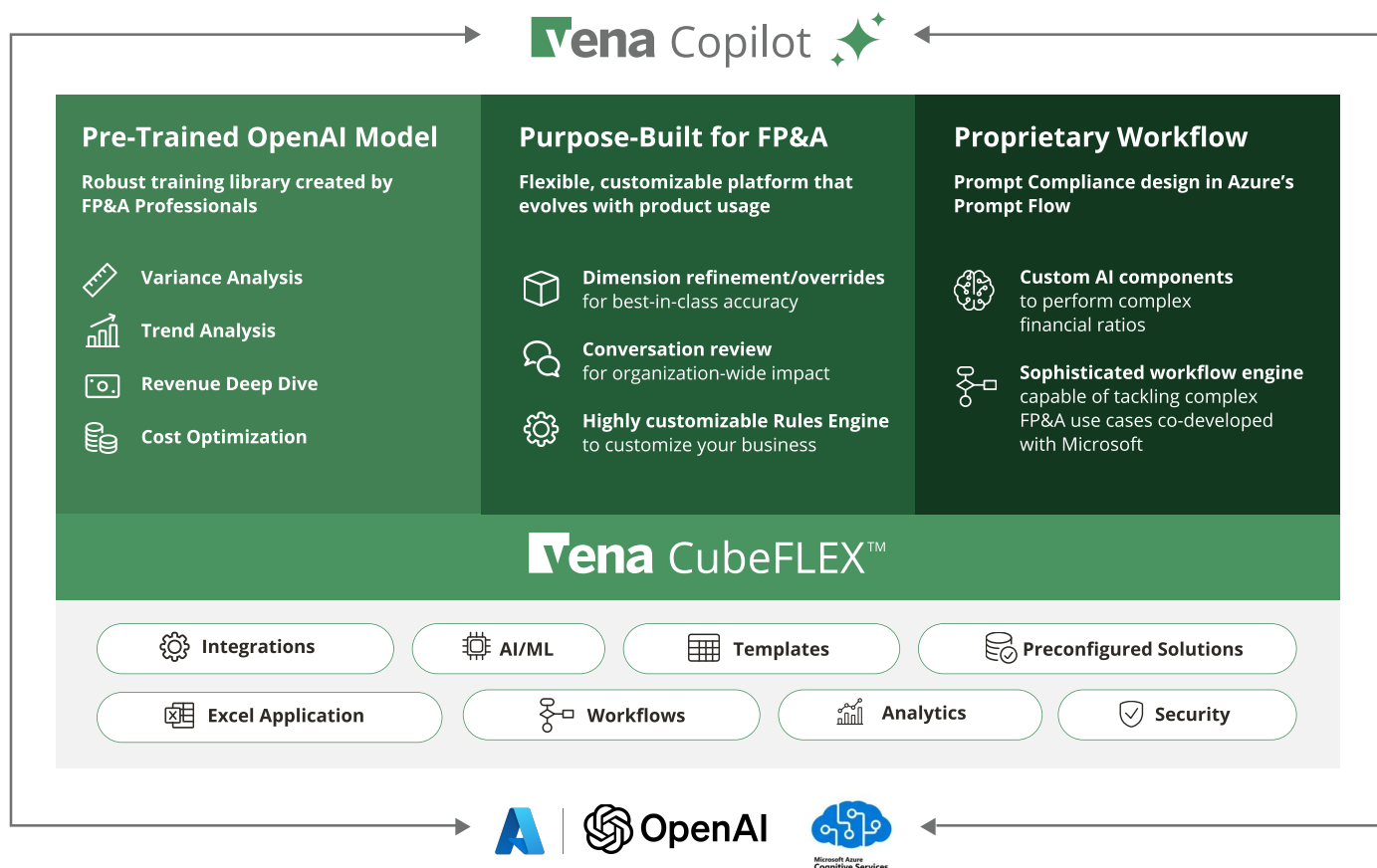
- ✓ Leverage generative AI **purpose-built for FP&A** to create and train AI models tailored to your use cases and data sets.
- ✓ **Make generative AI accessible across your teams** to improve analysis, empowering anyone in your organization to interact with your data and accelerate decision making.
- ✓ Use Vena Copilot alongside **Microsoft Copilot** to create a seamless, automated flow of work through Vena's native integrations with Microsoft 365.
- ✓ Ensure **data security** and **integrity** with Vena Copilot's robust security, privacy and prompt compliance management capabilities. And it's easy to set up—no IT, data scientists or AI engineers required.

“Vena Copilot is like having an additional financial analyst on my team, significantly speeding up my workflow by allowing me to quickly find answers to questions without needing to manually search through multiple files.

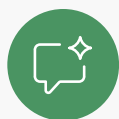
ANDREW McFARLANE
FINANCE MANAGER, KUALI INC.

Vena Copilot Architecture

Vena Copilot is able to work alongside Microsoft Copilot through Vena's native integrations with Microsoft 365. Together, they automate tasks and create a seamless flow of work, combining Vena's category-leading CPM and Microsoft Copilot's advanced productivity and collaboration capabilities to dramatically increase the efficiency and strategic impact of your finance and operations teams.



With Vena Copilot, you can:



Use **conversational AI** to **gather data**, generate reports, analyze trends, perform what-if analysis and more in minutes.



Quickly create and train **custom AI models** tailored to your data and use cases, and evolve them over time for smarter and faster decision making.



Utilize **Vena's powerful and native integrations** with **Microsoft 365** to use Vena Copilot alongside Microsoft Copilot for a seamless, automated flow of work.



Leverage Vena Copilot's **industry-leading security, compliance and privacy capabilities**—including access controls and prompt compliance management—to quickly and safely deploy enterprise-ready responsible AI across your organization.

Features and Capabilities

Make smarter business planning decisions faster with Vena Copilot. It uses an intuitive conversational interface that allows you to query your data, extract insights and streamline complex FP&A processes in a matter of minutes using the power of your words.

VENA COPILOT MODELER

Enhance access to accurate financial insights, tailored FP&A expertise, and evolve your AI models for smarter results over time with Vena Copilot's quick setup and easily configurable features.

Deploy enterprise-ready, responsible generative AI capabilities purpose-built for FP&A quickly, safely and securely without having to rely on IT, data scientists or AI engineers.

Review all conversations your organization is having with Vena Copilot to ensure transparency and accuracy of AI-generated results.

Quickly onboard finance team members and budget owners with an AI solution that drives trust, high adoption and low change management.

VENA COPILOT USER

With a single prompt, you can access real-time data and insights, provide stakeholders with timely, accurate answers to complex business questions and become a more efficient business partner.

Generate deeper insights faster and save time for strategic initiatives, as Vena Copilot performs complex analytical tasks in minutes, including trend, variance, seasonal and what-if analysis.

Take your analysis further with Vena Copilot response data in Excel and create a seamless and automated flow of work that sees Vena Copilot for FP&A work hand-in-hand with Microsoft Copilot so you can be more productive and operate more efficiently.

Collaborate with your Vena Copilot Modeler to create a flexible FP&A AI assistant tailored to your use cases and data sets, improving business agility and resilience.



Robust Security

Vena is committed to protecting customer data, leveraging Microsoft's Azure OpenAI service to enable advanced AI capabilities without compromising security. Customer and sensitive data are never used for AI model training. Instead, Vena allows customers complete control over their specific AI models, with Vena's in-house experts only managing general model development, eliminating automated analysis of user interactions.



Your data will not train OpenAI models

By using Microsoft's Azure OpenAI service, we can guarantee that we are getting the latest advancements in OpenAI's research without compromising on security.

Our Microsoft partnership allows us to offer you industry-leading system security, high compute capacity and low downtime.



Your data will not leave your Vena tenant

Ensuring that your financial data is secure is core to our value proposition. In our implementation of Vena Copilot, we allow you to maintain control over how the model trains for their specific use case. While we do maintain a general model that we train in-house, we do not programmatically analyze the ways in which users interact with their AI models.

For more detailed information about Vena's information security program, features and organization controls, please refer to the Vena Information Security Program (ISP) datasheet.

Join Over **1,800 Leading Companies** Using
Vena's Complete Planning Platform



Vena is the only Complete Planning platform natively integrated with Microsoft 365. Vena streamlines financial and operational planning, simplifies reporting and analysis processes, and provides advanced analytics and modeling capabilities to help business, finance and operations leaders make agile and more informed business decisions. With Vena, you can leverage the power of Excel and AI-powered insights in a unified, cloud-based platform that enhances productivity, collaboration and insights. Over 1,800 of the world's leading companies rely on Vena to power their planning. For more information, visit venasolutions.com.