



100% Client Success  
250+ Clients, 500+ Projects

## Driver Based Forecasting

### What is Driver Based Forecasting

Driver based forecasting is based on the notion that a company will link operational activities to key identifying metrics in order to calculate variable revenues and expenses. These key metrics are known as Global and Local drivers. Driver based forecasting helps with the “what if” scenario and helps to focus on what drives the organization, itself.

### Benefits of Driver Based Forecasting

- ‘What if’ Scenarios allow you to quickly change driver #s and push that down into entire forecast
- Predict Labor Expenses more accurately
- Create and ‘model’ your forecasts with the push of a button
- Focus on the most important aspects of forecasting (aka what DRIVES the business)
- Hit your targets!

### Keys to Driver Based Forecasting

- What drives revenue and cost
- Metrics for overhead
- Quickly create ‘what-if’ models
- Risk Analysis
- Standardizing the forecast process
- Strategic Decision Making



Make your job easier .....  
And hit your targets with  
Driver Based Forecasting

Contact us:  
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## Using Driver to Apply Rates and Caps

### Labor Drivers

- Benefits Rate
- 401k Rate
- Merit Increase Rate
- Payroll Tax Rate
- Unemployment Tax Cap
- Medicare Tax Rate
- Social Security Tax Rate
- Social Security Tax Cap
- Medicare Tax Cap
- Unemployment Tax Rate

	Current Year	Next Year
SSTax Rate1 Input	7.65%	7.65%
SSTax Rate2 Input	1.45%	1.45%
SSTax Cap Input	96,200	96,200
SUI Rate Input	2.00%	2.00%
SUI Cap Input	14,000	14,000
FUTA Rate Input	8.00%	8.00%
FUTA Cap Input	7,000	7,000
Medicare Rate Input	2.00%	2.00%

Global Drivers	Year
[	<b>Social Security Tax Rate</b>
	<b>Social Security Tax Cap</b>
	<b>Medicare Tax Rate</b>

	2014	2015	2016	2017
	6.20%	6.20%	6.20%	6.20%
\$	117,000	118,500	118,500	122,000
	1.45%	1.45%	1.45%	1.45%

Gross Income  
YTD Gross Income

2016				
	Jan	Feb	Mar	Apr
\$	30,000	30,000	40,000	40,000
\$	40,000	70,000	110,000	150,000

<b>Social Security Tax Expense</b>	\$ 1,860	\$ 1,860	\$ 2,480	
<b>Medicare Tax Expense</b>	\$ 435	\$ 435	\$ 580	\$ 580
<b>Total Social Security &amp; Medicare</b>	\$ 2,295	\$ 2,295	\$ 3,060	\$ 580

We Provide

## UNMATCHED EXPERIENCES

### ADVOCATES OF YOUR INTEREST

We believe that creating value starts with aligning ourselves with your best interests and acting as your advocates.

### DRIVEN TO DELIVER

Our work is both personal and purposeful. We pride ourselves on our grit and in our innate desire to execute and deliver.

### TRUSTED & PROVEN

Since our inception in 2002, we have built a track record of success. All our clients are references.

### TAILORS OF OUR CRAFT

A great solution is rooted in the depth of experience and is tailored to fit a specific and unique set of needs.

### A CULTURE OF INTEGRITY

Running our business with a focus on people instead of profit is what truly makes our organization unique.