

IFS Copperleaf Strategy

Driving decision certainty through
agentic AI



| IFS Copperleaf



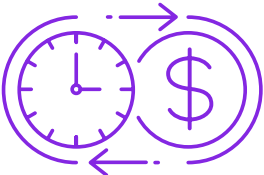
Turn bold ideas into board-ready decisions

U Finance and strategy leaders face unprecedented pressure to demonstrate that every dollar of investment advances strategic goals while standing up to shareholder, regulatory, and market scrutiny. Traditional planning tools like spreadsheets, static models, and siloed business cases can't keep pace.

IFS Copperleaf Strategy is an AI planning platform that turns bold ideas into an optimized, executable roadmap. By assessing potential investments and uncertainties at the portfolio level, Strategy helps strategic planners:

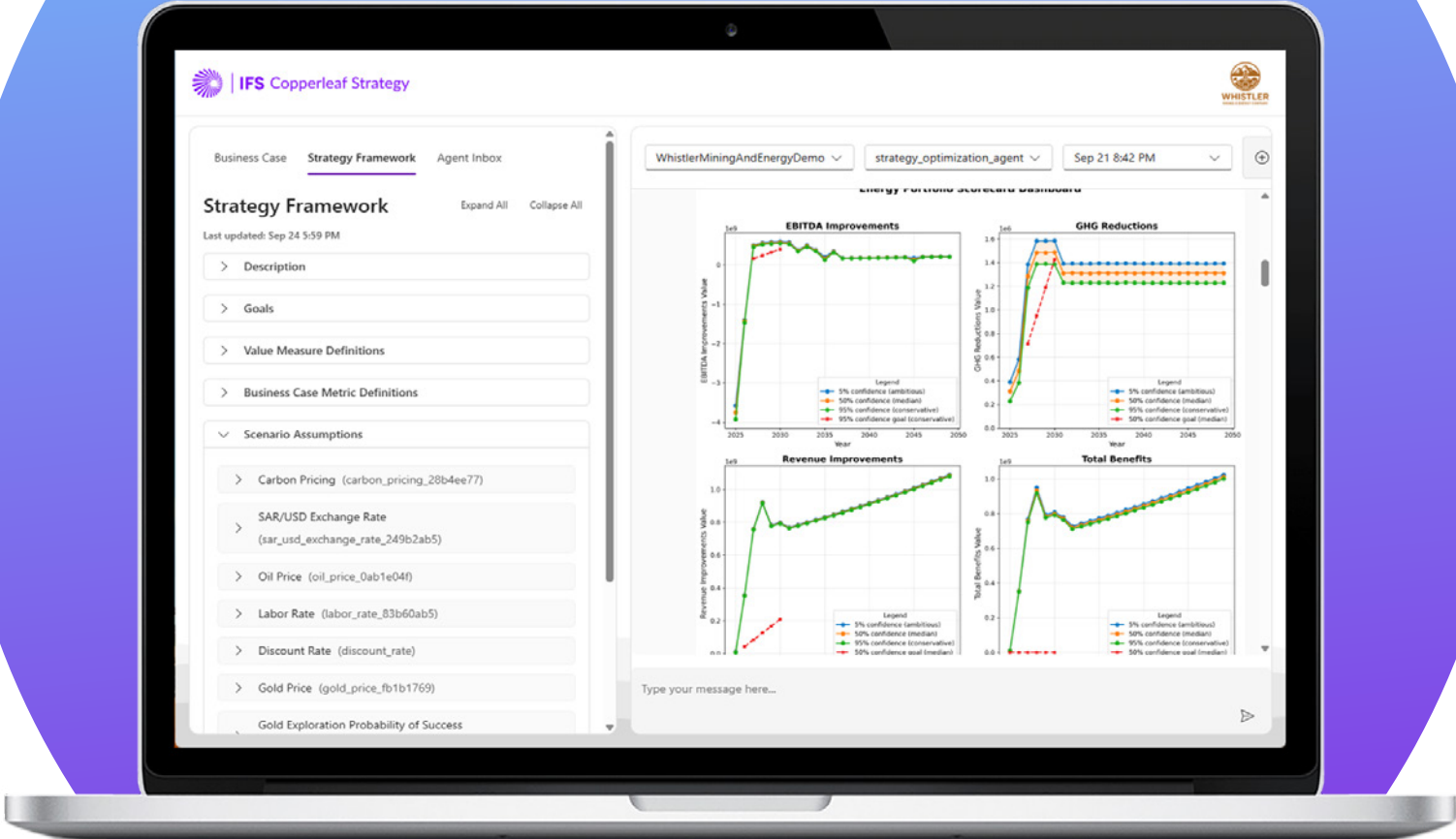
- Ideate and evaluate high-impact initiatives—from M&A and transformation programs to ESG and growth investments—in minutes, not months.
- Quantify value, risk, and uncertainty on a single economic scale that aligns every dollar to strategic, financial, and sustainability goals.
- Scenario-test and reprioritize instantly as market, regulatory, or capacity conditions evolve.

Strategy builds capital clarity and agility you can defend in any boardroom or earnings call.



Fast time-to-value

Cloud-ready implementation delivers the first optimized plan in under 90 days—many clients recover their subscription within a single planning cycle, and all recover ROI within 11 months.



Visualize the potential outcomes of your investment decision making.

Delivering resilience and assurance through governed agentic AI

Unlike spreadsheets or generic LLMs, IFS Copperleaf Strategy combines agentic AI with structured governance, ensuring every plan and business case is consistent, auditable, and defensible—and that your inputs are as easy as natural language.

Agentic AI in Strategy automates analysis, explores alternatives, and surfaces insights across multiple data sources, while governance ensures transparency and repeatability, so executive judgment is always supported by verifiable evidence.

Historical Challenge

- Lengthy, fragmented evaluation cycles
- Inconsistent business cases and “pet projects”
- Limited visibility into portfolio-level risk & ESG impact
- Difficulty defending plans to investors & boards
- Limited integration into financial planning

Strategy Advantage

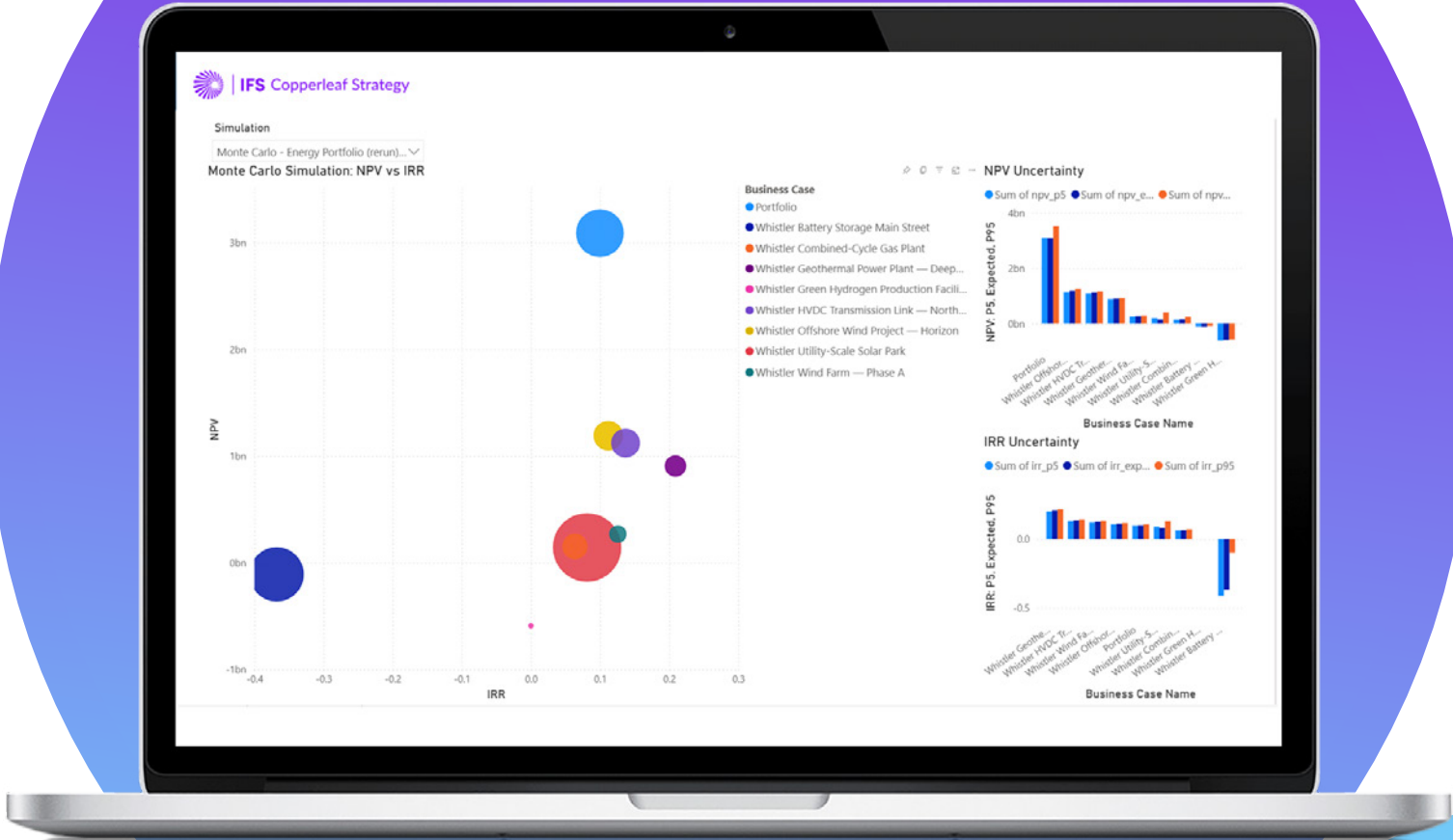
- Weeks to hours for confident go/no-go and funding gates
- Enterprise-wide discipline to prioritize the most valuable initiatives
- Data-driven trade-offs that balance ROI, resilience, and sustainability
- Scenario-backed narratives that build credibility and regulatory confidence
- Direct connection to FP&A for more accurate forecasting and reporting



How Strategy works

- 1. Capture ideas through AI-guided, role-based inputs that standardize cost, benefit, and risk information.
- 2. Value-model investments using the IFS Copperleaf Strategy Framework, extending the proven Copperleaf Value Model Library with metrics ranging from NPV, ROCE, weighted risk, to carbon abatement.
- 3. Optimize portfolios with AI-powered analysis that explores trade-offs and tests uncertainty through Monte Carlo analysis to recommend the capital mix that maximizes enterprise value within budget, resource, and risk constraints.
- 4. Stress-test scenarios to see how regulatory changes, or macroeconomic shifts affect shareholder value and balance-sheet optics.

A select group of forward-looking organizations are already partnering with IFS Copperleaf through our **Early Adopters Program** –helping shape the next generation of enterprise planning. Participants gain early access to new capabilities, influence product development, and accelerate their own transformation journeys. Space is limited–join the leaders turning disciplined capital allocation into a strategic advantage.



Monte Carlo simulations test any number of future scenarios.

About IFS



IFS is the world's leading provider of Industrial AI and enterprise software for hardcore businesses that service, power, and protect our planet. Our technology enables businesses which manufacture goods, maintain complex assets, and manage service-focused operations to unlock the transformative power of Industrial AI™ to enhance productivity, efficiency, and sustainability.

Within our single platform, our industry specific products are innately connected to a single data model and use embedded digital innovation so that our customers can be their best when it really matters to their customers – at the Moment of Service™.

The industry expertise of our people and of our growing ecosystem, together with a commitment to deliver value at every single step, has made IFS a recognized leader and the most recommended supplier in our sector. Our global team of over 7,000 employees every day live our values of agility, trustworthiness, grit and collaboration in how we support thousands of customers.

Learn more about how our enterprise software solutions can help your business today at ifs.com.

#MomentOfService