



Highlights

- Automates manual, spreadsheet-based planning, budgeting, forecasting, reporting and analysis
 - Uncovers predictive insights automatically from your data
 - Links operational tactics to financial plans, synthesizes information, infers trends and delivers insights
 - Enables dimensional analysis and calculations for in-depth profitability and scenario analytics
 - Retains the familiar Microsoft Excel interface where needed to accelerate adoption
 - Facilitates rapid on-cloud deployment across the organization
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IBM Planning Analytics

Self-service planning and analytics on cloud for greater speed, agility and foresight

Overview

Volatility, uncertainty and risk have been increasing for years—and they're not going away any time soon. In response, leading CFOs and finance organizations are seeking analytics solutions to help them drive greater efficiency, deliver stronger foresight and steer business performance more effectively.

But most Finance teams still spend an inordinate amount of time in manual, spreadsheet-based processes – collecting, consolidating and validating data. Because of that, these finance professionals are often unable to deliver plans, budgets, forecasts, reports and value-added analysis in a timely fashion. So, they are seeking more flexible, agile solutions that can provide fast, reliable results with deeper insight and greater foresight.

Finance teams often believe they have to compromise between the ease of use and fast deployment of a cloud solution and the flexible, powerful analytics capabilities traditionally reserved to on-premises solutions. But no more. Now they don't have to compromise. Now they can have it all with IBM® Planning Analytics.

Speed, agility and foresight in a cloud-based performance management solution

IBM Planning Analytics is a fast, easy, flexible and complete planning and analytics cloud solution. It helps Finance organizations drive greater process efficiency and deliver the foresight they need to steer business performance. This solution not only automates manual tasks, but takes you beyond automation by providing self-service analytics that can help you uncover new insights directly from your data. It speeds decision making and improves decision quality.



IBM Planning Analytics gives you:

- **Speed**—You can start instantly and grow your deployment quickly wherever needed. Automate plans, analyses and reports to drive efficiency.
- **Agility**—Adapt plans and analyses to changing business conditions. Align financial plans with corporate objectives, linked to operational tactics and market events.
- **Foresight**—Make analytics available to everyone—so they can explore and visualize both internal and external data, and anticipate the future.

With a dynamic planning and analytics workspace that lets you link financial plans with operational tactics, IBM Planning Analytics helps you synthesize information, infer trends and deliver insights to improve decision quality. It allows individuals, groups and enterprise leaders to break free of the constraints of previous generations of planning and analytic tools and become more agile and prepared for the inevitable volatility, uncertainty and risk that the future will bring.

Interactive planning and analytics workspace

IBM Planning Analytics offers a customizable workspace that can be deployed to all cost center owners and business managers. It provides a single, consistent view into KPIs and enables users to evaluate plans, identify gaps and diagnose root causes. Users can test business assumptions and scenarios and immediately see the financial impact of alternative courses of action.

Intelligent queries allow quick analysis and report creation based on common business terms. And powerful multi-dimensional expression-based (MDX) queries allow data analysis for any combination of hierarchies and dimensions. Power users can quickly build sophisticated queries to deliver stronger insight, such as through asymmetrical nested reports. But users don't need to be experts in order to deploy multi-dimensional analyses and reports to all the right people faster than ever before.

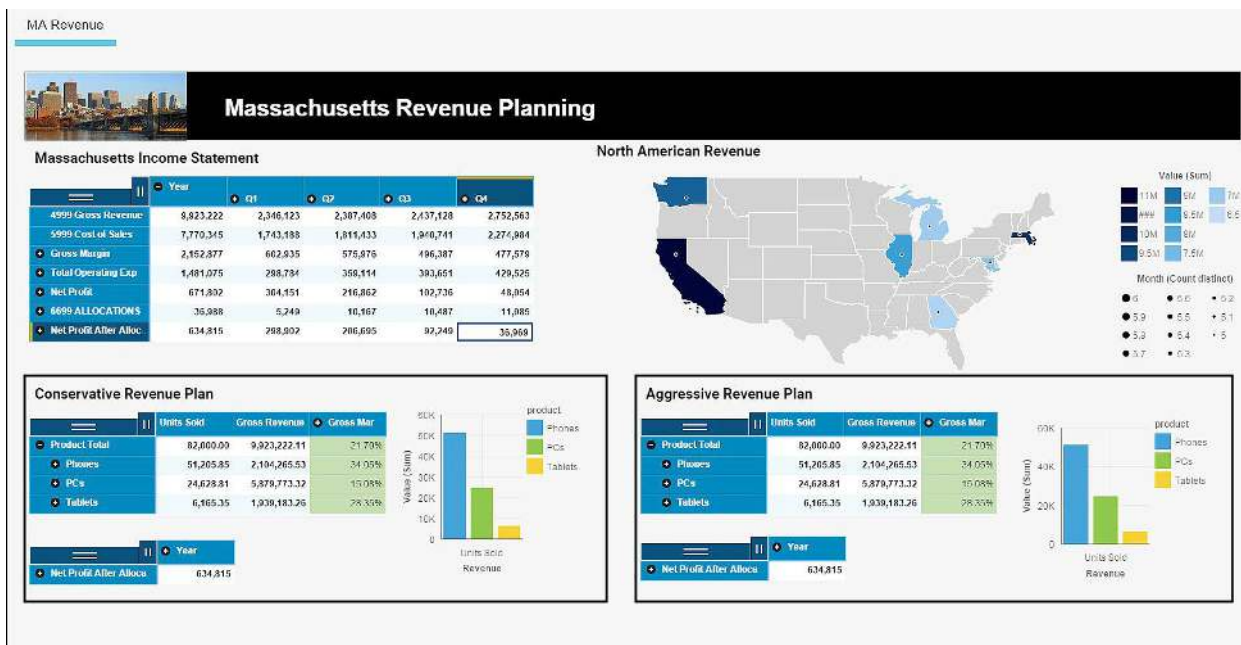


Figure 1: IBM Planning Analytics provides an interactive, customizable workspace.

Multi-dimensional analysis

Built on the powerful IBM Cognos® TM1 online analytical processing (OLAP) engine, IBM Planning Analytics enables multi-dimensional analysis of large, historical and future-oriented data sets. It integrates multiple data sources and enables comparative analysis of information from all relevant systems. Users can perform complex dimensional calculations and analysis of, for example, product and customer profitability, sales mix, and price/volume variance.

IBM Planning Analytics simplifies the maintenance and administration of planning models and scenario-based hierarchies. In addition, its distributed administration enables all geographies and departments to participate in a well-managed process. The result is a more reliable, forward-looking view of business structures such as product families and sales territories. It also helps define targets for planning and forecasting as well as for profit and growth initiatives.

Advanced self-service modeling

Self-service modeling capabilities in IBM Planning Analytics enable everyday financial and business analysts to create and maintain sophisticated plans and forecasts with little to no IT support. Owned by Finance and built on mature, multi-dimensional technology, IBM Planning Analytics enables dimensional analysis and calculations for even the most demanding profitability and scenario models.

Analysts can build models integrating virtually any business driver into plans, budgets and forecasts. Models can reflect company structures, business rules and relationships, and then be revised as structures, rules and relationships change. Users can define and link operational drivers with financial outcomes throughout the organization's entire planning

process. This improves visibility into leading indicators of performance and shows the likely impact of different operational drivers on plans and forecasts, increasing the lead time needed to assess alternatives.

IBM Planning Analytics also helps you reduce the errors common to manual, spreadsheet-based processes and reduce planning cycles. The result is that financial and business analysts can spend more time on value-added analysis, and less time maintaining spreadsheets.

Data discovery and predictive power of IBM Watson Analytics

Leveraging the ground-breaking technology of IBM Watson™ Analytics, IBM Planning Analytics helps you discover new insights automatically, directly from your data.

Guided data exploration and natural language queries based on common business terms enable you to work with your data easily and perform fast, thorough analysis. Automated visualizations with clear and compelling graphics then help you share the results with decision makers. The statistical analysis and predictive capabilities of Watson Analytics help you see what's likely to happen next and what you can do about it.

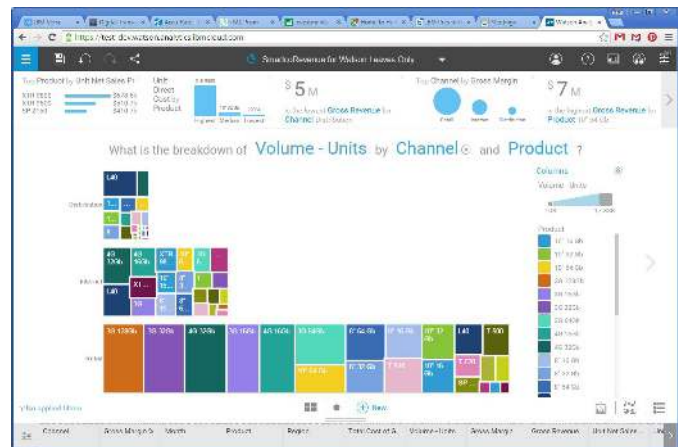


Figure 2: With guided data exploration, predictive analytics and automated visualizations, IBM Watson Analytics helps you formulate and evaluate plans.

Scorecards and dashboards

IBM Planning Analytics supports a full range of reporting capabilities including scorecarding and dashboarding. You can develop and deploy role-based dashboards and scorecards linked to plans and budgets and share them across the enterprise.

Scorecards and dashboards help business users measure and monitor performance in the context of their specific roles and functions, which in turn helps drive strategy management and execution by aligning initiatives, resources and actions with corporate objectives.

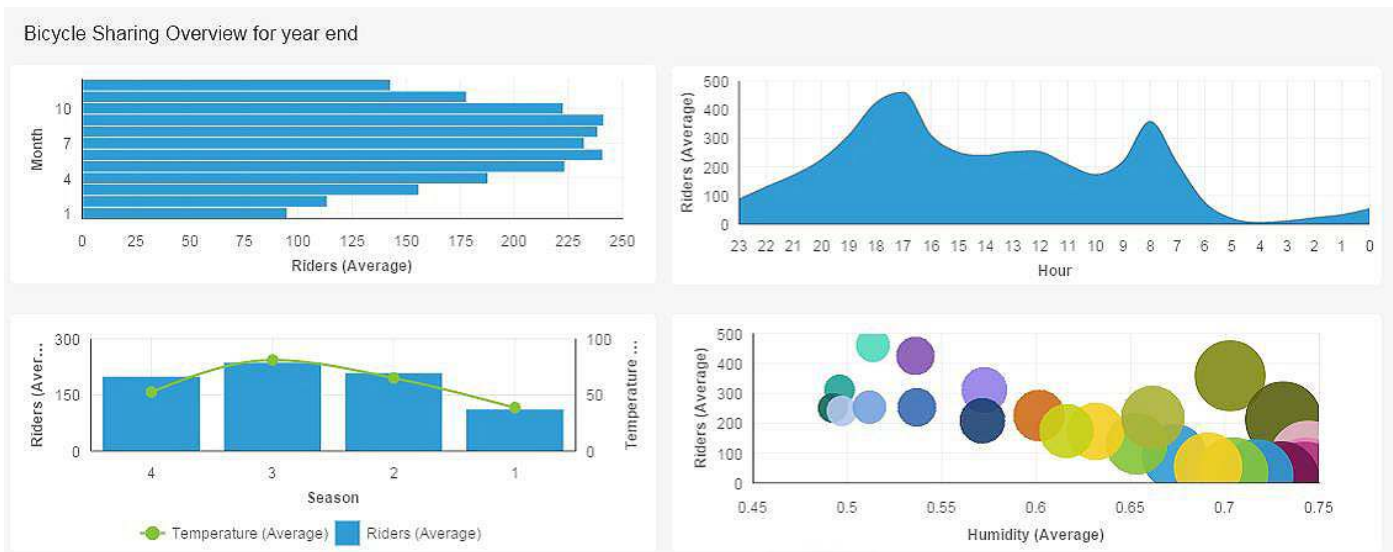


Figure 3: Scorecards and dashboards offer fast, intuitive insight into progress toward organizational objectives.

Access to familiar Microsoft Excel interface

Spreadsheets are among the most popular software tools available, despite their limitations. That's why IBM Planning Analytics enables users to embrace, rather than replace their Microsoft Excel spreadsheets.

IBM Planning Analytics retains full Excel functionality and formatting, including Excel capabilities such as graphing and built-in functions. Finance professionals can continue working in the Excel interface where needed while enjoying all the capabilities of a modern planning and analytics solution. Users can explore and analyze data sourced from multidimensional planning and analytics models within the familiar spreadsheet format, while the organization can extend analysis capabilities to more users to support faster, better informed decisions.

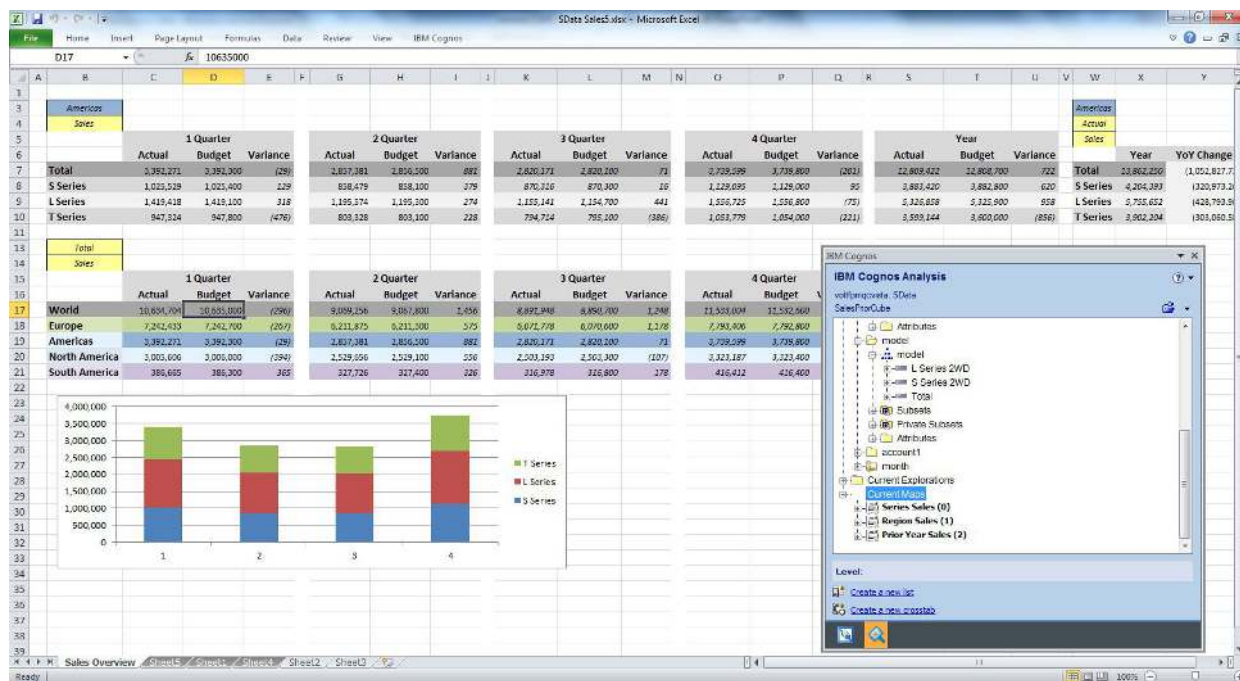


Figure 4: IBM Planning Analytics allows users to retain the familiar Excel interface.

Business accelerators – IBM Performance Blueprints

IBM Planning Analytics enables organizations to accelerate their implementations and drive faster return on investment (ROI) by leveraging the extensive solution catalog of IBM Performance Blueprints.

IBM Performance Blueprints are pre-configured data, process and policy models that encapsulate the collective best-practice knowledge in planning and performance management of IBM experts and leading IBM customers. Blueprint models address a number of essential functional areas as well as the unique needs of specific industries. Blueprints help organizations jump-start their implementations and streamline project schedules.




<p>Solution</p>  <p>Integrated Financial Planning & Forecasting</p> <p>An overall strategic plan helps companies establish guidelines for developing department-level operational and financial plans. A long-range strategic...Read more</p>	<p>Solution</p>  <p>Product Profitability Analytics</p> <p>Test drive our forward-looking profitability modeling Blueprint. Start your free 15-day trial. ...Read more</p>	<p>Solution</p>  <p>Risk-Adjusted Planning</p> <p>More than ever before, effective planning and forecasting needs to take uncertainty and risk into account. Indeed, according to the 2014 Association f...Read more</p>
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Figure 5: IBM Performance Blueprints accelerate time to results by encapsulating best-practice planning in a variety of functional and industry-specific processes.

IBM Planning Analytics benefits

- Aligns financial plans with corporate objectives linked to operational tactics and market events
 - Enables finance and business users to create timely, reliable plans, budgets and forecasts
 - Discovers insights automatically from the data, and drives fast, forward-looking decision-making with predictive capabilities of IBM Watson Analytics
 - Creates effective visualizations automatically
 - Provides customizable planning and analytics workspace with full Microsoft Excel functionality.
 - Incorporates scorecards and dashboards to monitor key performance indicators (KPIs) and communicate business results
 - Supports natural language searching and multi-dimensional expressions-based (MDX) queries for fast, powerful analysis.
 - Delivers self-service analytics and process administration
 - Enables all geographies and departments to participate in a collaborative planning process owned by Finance
 - Enables rapid ROI with solution accelerators in the form of IBM Performance Blueprints
 - Facilitates flexible, secure cloud deployment.
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Conclusion

In an economic environment of heightened volatility, uncertainty and risk, IBM Planning Analytics provides the speed, agility and foresight your organization needs to compete successfully. Starting from a dynamic planning and analytics workspace, this cloud-based planning and analytics solution enables Finance and non-Finance users alike to synthesize information, infer trends and deliver insights. It supports your essential planning, budgeting and forecasting processes, but goes beyond basic automation to improve decision making throughout the enterprise. IBM Planning Analytics takes you further to help your organization become more agile and prepared for whatever the future brings.

About IBM Analytics

IBM Analytics software delivers data-driven insights that help organizations work smarter and outperform their peers. This comprehensive portfolio includes solutions for business intelligence, predictive analytics and decision management, performance management, and risk management.

IBM Analytics solutions enable companies to identify and visualize trends and patterns in areas, such as customer analytics, that can have a profound effect on business performance. They can compare scenarios, anticipate potential threats and opportunities, better plan, budget and forecast resources, balance risks against expected returns and work to meet regulatory requirements. By making analytics widely available, organizations can align tactical and strategic decision-making to achieve business goals. For further information please visit ibm.com/analytics

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