IBM Planning Analytics

Speed, agility and foresight — Powered by IBM TM1

Highlights

- Automates manual, spreadsheet-based planning, budgeting, forecasting, reporting and analysis

- Links operational tactics to financial plans, synthesizes information, infers trends and delivers insights through compelling visualizations in a dynamic, self-service workspace

- Uncovers predictive insights automatically – directly from internal or external data

- Enables in-depth profitability and what-if analysis

- Retains the familiar Microsoft Excel interface where needed to accelerate adoption

- Supports cloud, on-premises and hybrid deployment options

Overview

Volatility, uncertainty and risk have been increasing for years — and they're not going away any time soon. 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 teams are often unable to deliver needed plans, budgets, forecasts, reports and value-added analysis in a timely fashion.

In response, leading CFOs and finance organizations are seeking faster, flexible solutions to help them deliver deeper insights and stronger foresight to steer business performance more effectively. All too often, however, they believe they have to compromise between the ease of use and fast deployment of a cloud solution and the powerful, flexible, analytic capabilities traditionally available only in on-premises solutions. But now they don't have to compromise. Now they can have it all with IBM® Planning Analytics.

Speed, agility and foresight — all in one performance management solution

IBM Planning Analytics is a fast, easy, flexible and complete planning and analytics solution that can be deployed in cloud, on-premises and hybrid environments. It helps Finance organizations drive greater process efficiency and deliver the foresight needed to steer business performance. This solution not only automates manual tasks, but takes you beyond automation to help you uncover new insights directly from your data. IBM Planning Analytics helps bring the office of finance into the cognitive era by allowing users to interact with data and analytics the way the human mind works: to communicate with compelling visualizations, make fast predictions based on evolving trends, perform in-depth, what-if analysis to test alternative assumptions, and, finally, to create timely, reliable plans that put insight into action. It speeds decision making *and* improves decision quality.

IBM Planning Analytics gives you:

- **Speed**—Start quickly and grow your deployment wherever needed, automating plans, analyses and reports to drive efficiency.
- **Agility**—Adapt plans, budgets and forecasts to changing business conditions. Then align financial plans with corporate objectives, linked to operational tactics and market events.
- **Foresight**—Explore and visualize insight from internal and external data, understand what is driving your business, and then incorporate those insights into plans that anticipate the future with confidence.

With a dynamic planning and analytics workspace that lets you link financial plans to operational tactics, IBM Planning Analytics helps you synthesize information and infer trends. It facilitates best practices such as driver-based planning and rolling forecasts, and allows individuals, groups and enterprise leaders to break free of the constraints of previous generations of planning tools.

Interactive planning and analytics workspace

IBM Planning Analytics features a customizable workspace that can be deployed to cost center owners and business managers. It provides a single, consistent view of KPIs and enables users to evaluate plans, identify performance gaps and diagnose the root causes of problems. 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. Powerful multidimensional expression-based (MDX) queries allow data analysis for any combination of hierarchies and dimensions. Power users can quickly build sophisticated queries, such as those involving asymmetrical nested reports. But users don't need to be experts in order to deploy multidimensional analyses and reports to whoever needs them, faster than ever before.
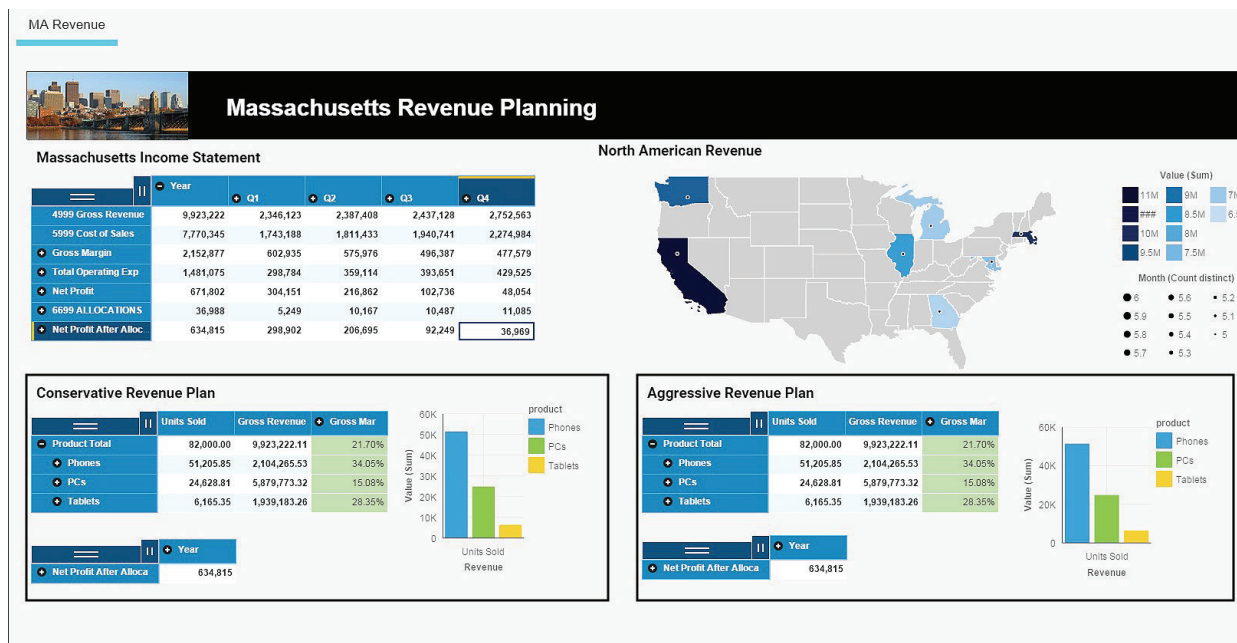

Figure 1: IBM Planning Analytics provides an interactive, customizable workspace.

Multidimensional analysis

Built on the powerful IBM TM1® online analytical processing (OLAP) engine, IBM Planning Analytics enables multidimensional 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. Complex hierarchies and dimensions can be handled easily to gain new insights into business performance.

IBM Planning Analytics simplifies the maintenance and administration of planning models and scenario-based hierarchies. This functionality enables you to model attributes and drill on those attributes as if they were a dimension, but without having to create a new dimension or add elements (members) to the hierarchy. The result is a more efficient database that allows more detailed analysis—a particularly useful capability for retailers, for example.

Its distributed administration enables all geographies and departments to participate in a well-managed, collaborative 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 use in planning and forecasting as well as in profit and growth initiatives.

Advanced self-service modeling

Advanced 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, multidimensional technology, IBM Planning Analytics enables dimensional analysis and calculations for even the most demanding profitability and scenario models.

Analysts can build models that integrate virtually any business driver into plans, budgets and forecasts. The models can reflect company structures, business rules and relationships, and then be revised as those structures,

rules and relationships change. Attributes of hierarchy members can easily be modeled, for detailed multi-dimensional analysis. Users can define operational drivers and link them to financial outcomes throughout the planning process. This improves visibility into leading performance indicators and shows the likely impact of different operational drivers on plans and forecasts, thus increasing the lead time available to assess alternatives.

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

Data discovery and the 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 results with decision makers. The statistical analysis and predictive capabilities of Watson Analytics help you see what's likely to happen next and understand what you can do about it.

Figure 2: Guided data exploration, predictive analytics and automated visualizations help you formulate and evaluate plans.

3
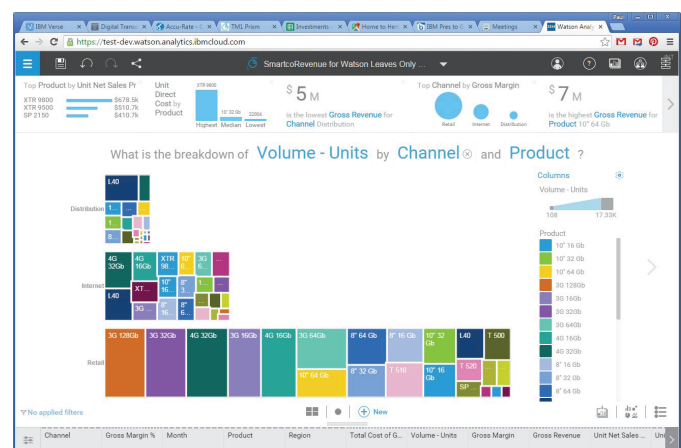
Scorecards and dashboards

IBM Planning Analytics supports a full range of reporting capabilities including scorecarding and dashboarding. You can develop role-based dashboards and scorecards linked to plans and budgets and then 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 helping align initiatives, resources and actions with corporate objectives.
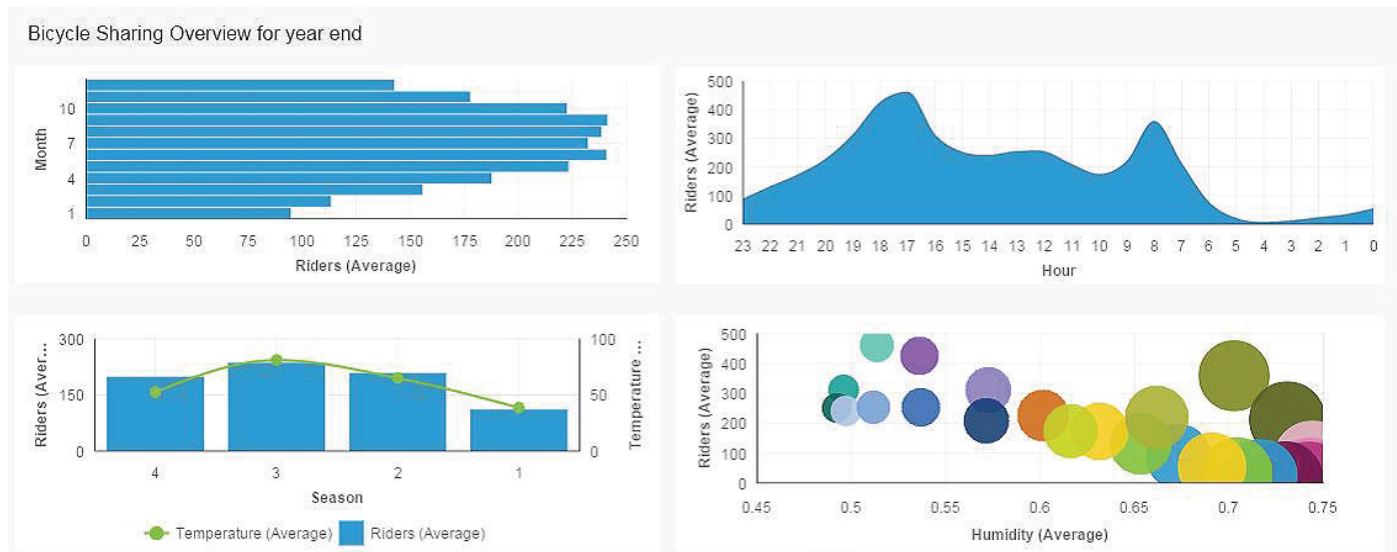
Figure 3: Scorecards and dashboards offer fast, intuitive insight into the organization's progress toward its objectives.

Access to familiar Microsoft Excel interface

Spreadsheets are among the most popular software tools ever invented, in spite of their limitations. That's why IBM Planning Analytics enables users to continue working in the Microsoft Excel interface where needed, rather than replace their spreadsheets.

IBM Planning Analytics retains full Excel functionality and formatting, including Excel capabilities such as graphing and built-in functions. Finance professionals can work in the Excel interface 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.
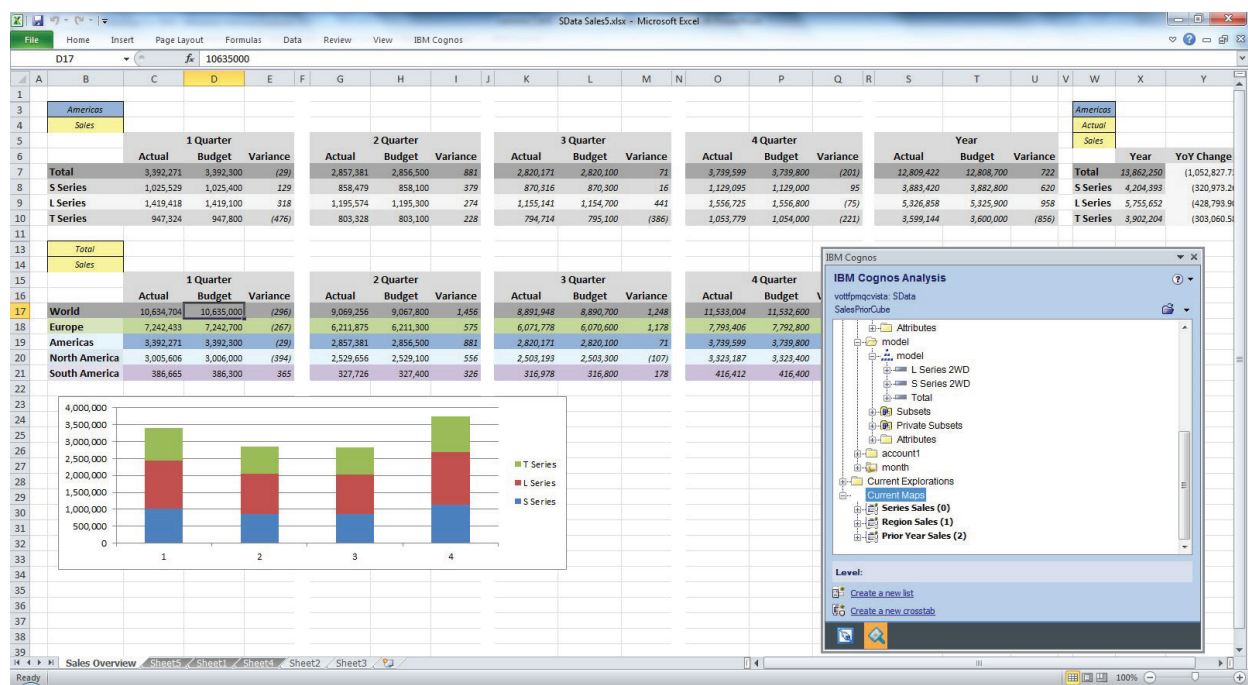

Figure 4: IBM Planning Analytics allows users to retain the familiar Excel interface.

Business accelerators—IBM Quick Start Templates

IBM Planning Analytics enables organizations to accelerate their implementations and drive faster return on investment (ROI) by leveraging our catalog of IBM Quick Start Templates.

These planning templates are pre-configured data, process and policy models that encapsulate the collective best-practice knowledge of IBM experts and leading IBM customers. Planning models address a number of essential functional areas as well as the unique planning and performance management needs of specific industries. The templates help organizations jump-start their implementations and streamline project schedules.
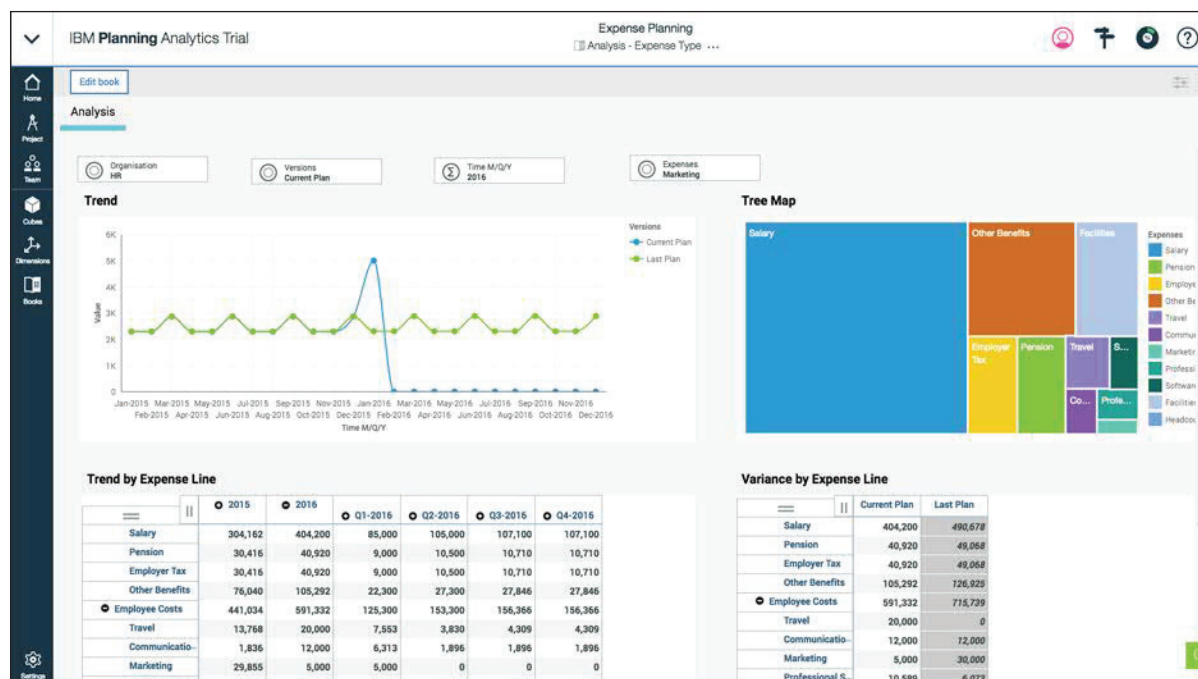
Figure 5: Pre-configured Quick Start Templates accelerate time to results by encapsulating best-practices for a variety of functional and industry-specific processes.

IBM Planning Analytics benefits

- Provides customizable planning and analytics workspace with full Microsoft Excel functionality
- 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
- Allows all geographies and departments to participate in a collaborative planning process owned by Finance
- Facilitates best practices such as driver-based planning and rolling forecasts
- Performs complex cost allocations and profitability analysis, and lets users drill down for a granular view of product profitability.
- Discovers insights automatically, directly from the data, and drives fast, forward-looking decision-making with the predictive capabilities of IBM Watson Analytics
- Creates compelling visualizations automatically
- Incorporates scorecards and dashboards to monitor key performance indicators (KPIs) and communicate business results
- Offers guided modeling, data/metadata management and application design and deployment
- Engages on-the-go users with mobile capabilities, including a mobile client for the Apple iPad.
- Supports natural language searching and multi-dimensional expressions-based (MDX) queries for fast, powerful analysis.
- Provides role-based security to support multiple users and user types and ensure that users see only what they need to.
- Enables rapid ROI with solution accelerators in the form of pre-configured IBM planning templates
- Facilitates cloud, on-premises and hybrid deployment.

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 solution enables Finance and non-Finance users alike to synthesize information, infer trends and deliver needed insights. It offers visibility into plans, budgets and forecasts, with rapid what-if scenario modeling and profitability analysis. It supports essential performance management processes, but goes beyond basic automation to drive collaboration and 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

Request a call

To request a call or to ask a question, go to **ibm.com**/analytics/contactus. An IBM representative will respond to your inquiry within two business days.