

**IBM Planning Analytics in the context of an
Analytics Center of Excellency (ACE):
Focus Areas, Responsibilities, and Roles**

Prepared:
April 2017

Created By:

Andreas Kugelmeier
Executive Consultant, FOPM
Planning Analytics Architect
IBM Data and AI Expert Labs
Mobile Phone: +1-215-384-7302
Email: kugelmeier@us.ibm.com

Document Version History

Date	Version	Author	Description
4/27/2017	1.1	Andreas Kugelmeier	
5/22/2017	1.11	Andreas Kugelmeier	Add diagram

Notices & Disclaimers

Copyright © 2017 by International Business Machines Corporation (IBM). No part of this document may be reproduced or transmitted in any form without written permission from IBM.

U.S. Government Users Restricted Rights - Use, duplication or disclosure restricted by GSA ADP Schedule Contract with IBM.

Information in these presentations and papers (including information relating to products that have not yet been announced by IBM) has been reviewed for accuracy as of the date of initial publication and could include unintentional technical or typographical errors. IBM shall have no responsibility to update this information. THIS document is distributed "AS IS" without any warranty, either express or implied. In no event shall IBM be liable for any damage arising from the use of this information, including but not limited to, loss of data, business interruption, loss of profit or loss of opportunity. IBM products and services are warranted according to the terms and conditions of the agreements under which they are provided.

Any statements regarding IBM's future direction, intent or product plans are subject to change or withdrawal without notice.

Performance data contained herein was generally obtained in a controlled, isolated environment. Customer examples are presented as illustrations of how those customers have used IBM products and the results they may have achieved. Actual performance, cost, savings or other results in other operating environments may vary.

References in this document to IBM products, programs, or services does not imply that IBM intends to make such products, programs or services available in all countries in which IBM operates or does business.

Workshops, sessions and associated materials may have been prepared by independent session speakers, and do not necessarily reflect the views of IBM. All materials and discussions are provided for informational purposes only, and are neither intended to, nor shall constitute legal or other guidance or advice to any individual participant or their specific situation.

It is the customer's responsibility to insure its own compliance with legal requirements and to obtain advice of competent legal counsel as to the identification and interpretation of any relevant laws and regulatory requirements that may affect the customer's business and any actions the customer may need to take to comply with such laws. IBM does not provide legal advice or represent or warrant that its services or products will ensure that the customer is in compliance with any law.

Information concerning non-IBM products was obtained from the suppliers of those products, their published announcements or other publicly available sources. IBM has not tested those products in connection with this publication and cannot confirm the accuracy of performance, compatibility or any other claims related to non-IBM products. Questions on the capabilities of non-IBM products should be addressed to the suppliers of those products. IBM does not warrant the quality of any third-party products, or the ability of any such third-party products to interoperate with IBM's products. IBM expressly disclaims all warranties, expressed or implied, including but not limited to, the implied warranties of merchantability and fitness for a particular purpose.

The provision of the information contained herein is not intended to, and does not, grant any right or license under any IBM patents, copyrights, trademarks or other intellectual property right.

IBM, the IBM logo, ibm.com, Aspera®, Bluemix, Blueworks Live, CICS, Clearcase, Cognos®, DOORS®, Emptoris®, Enterprise Document Management System™, FASP®, FileNet®, Global Business Services®, Global Technology Services®, IBM ExperienceOne™, IBM SmartCloud®, IBM Social Business®, Information on Demand, ILOG, Maximo®, MQIntegrator®, MQSeries®, Netcool®, OMEGAMON, OpenPower, PureAnalytics™, PureApplication®, pureCluster™, PureCoverage®, PureData®, PureExperience®, PureFlex®, pureQuery®, pureScale®, PureSystems®, QRadar®, Rational®, Rhapsody®, Smarter Commerce®, SoDA, SPSS, Sterling Commerce®, StoredIQ, Tealeaf®, Tivoli®, Trusteer®, Unica®, urban{code}®, Watson, WebSphere®, Worklight®, X-Force® and System z® Z/OS, are trademarks of International Business Machines Corporation, registered in many jurisdictions worldwide. Other product and service names might be trademarks of IBM or other companies. A current list of IBM trademarks is available on the Web at "Copyright and trademark information" at: www.ibm.com/legal/copytrade.shtml.

- IBM's statements regarding its plans, directions, and intent are subject to change or withdrawal without notice at IBM's sole discretion.
- Information regarding potential future products is intended to outline our general product direction and it should not be relied on in making a purchasing decision.
- The information mentioned regarding potential future products is not a commitment, promise, or legal obligation to deliver any material, code or functionality. Information about potential future products may not be incorporated into any contract.
- The development, release, and timing of any future features or functionality described for our products remains at our sole discretion.

Performance is based on measurements and projections using standard IBM benchmarks in a controlled environment. The actual throughput or performance that any user will experience will vary depending upon many factors, including considerations such as the amount of multiprogramming in the user's job stream, the I/O configuration, the storage configuration, and the workload processed. Therefore, no assurance can be given that an individual user will achieve results similar to those stated here.

Table of Contents

1	The function of a Financial Analytics Center of Excellency (Financial ACE)	4
2	Financial ACE & IBM Planning Analytics: Focus Areas & Responsibilities	5

1 The function of a Financial Analytics Center of Excellency (Financial ACE)

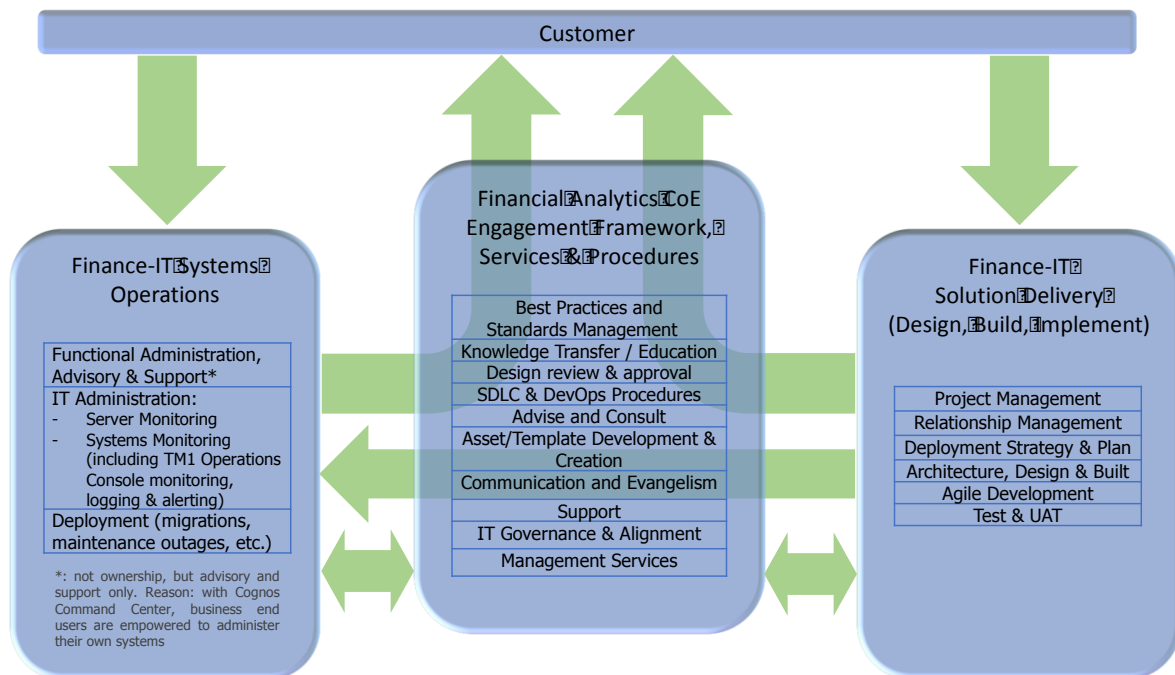
Particularly in organizations where the Financial Analytics environment has grown without the support of a corresponding enterprise architecture & strategy, Finance-IT DevOps teams mostly must resort to addressing operational challenges in a tactical, ad-hoc fashion. Subsequently such DevOps teams are operating under ever increasing time constraints while at the same time having to meet an over-proportionally increasing demand for its services due to the change brought about by increasing regulation, margin pressure, integration needs & Financial Transformation initiatives.

In such situations, DevOps becomes the bottleneck for Financial Analytics: Given the increasing demand for Financial Analytics (coming from the demand to make better business decisions by analyzing underlying business data), the DevOps bottlenecks will put a stranglehold on the implementation and roll-out of Financial Analytics Solutions.

To proactively address these challenges from an organizational standpoint, IBM recommends that Customers **establish and structure a Financial Analytics Center of Excellency**.

The Financial Center of Excellency is to

- provide DevOps with an organizational & strategic backbone that will result in operational efficiency, transparency & reliability and
- provide the business (the Analytics consumers) with a clear, one-stop engagement and service framework



2 Financial ACE & IBM Planning Analytics: Focus Areas & Responsibilities

TM1/PA CoE Focus Areas		Theme	Specifics	possible/suggested Owners
1	Best Practices and Standards Management	Sharing experiences and standardizing operations for greater efficiency and lower risk	<ul style="list-style-type: none"> • Submission, review, approval and publication process • Knowledge management • Standards, business rules, methodologies, frameworks • Compliance with industry standards • Architecture & Design Standards 	<ul style="list-style-type: none"> • Chief Architect • TM1/PA Solutions & Product Manager
2	Knowledge Transfer / Education	comprehensive & evolving Enablement and Training Program	<ul style="list-style-type: none"> • DevOps Enablement & Training on guidelines, standards, practices, templates as determined by 'Best Practices & Standards Management' function • Leveraging IBM training program as starting point 	<ul style="list-style-type: none"> • Chief Architect • DevOps Management • TM1/PA Solutions & Product Manager
3	Design review & approval	Quality Control, Quality & Standards Audit	<ul style="list-style-type: none"> • Leveraging guidelines & templates evolving from the 'Best Practices & Standards Management' function, • Review & Approve proposed designs/architectures prior to Development • Validate architectures & design prior to QA 	<ul style="list-style-type: none"> • Chief Architect
4	SDLC & DevOps Procedures	Defining a technology architecture, SDLC & DevOps processes that support the enterprise in a scalable and extensible fashion	<ul style="list-style-type: none"> • Enterprise Reference Architectures • Capacity planning, security, version control, migration and upgrade • Shared service center, cloud architecture, maintenance and support • Development, UAT, QA and Production • Performance, fault tolerance, high availability and load balancing 	<ul style="list-style-type: none"> • TM1/PA Solutions & Product Manager • Chief Architect
5	Advise and Consult	Providing DevOps with guidance and knowledge transfer	<ul style="list-style-type: none"> • Enabling self-service and mentoring of analytical skills • Advising on new technologies, concepts, capabilities and process improvements • Demo sandbox for new technology capabilities and proofs of concept 	<ul style="list-style-type: none"> • Chief Architect • TM1/PA Solutions & Product Manager
6	Asset/Template Development & Creation	Asset Development and Curation	<ul style="list-style-type: none"> • Creation of a reusable component repository • Standard TM1/PA Utilities/Tools/Modules/Templates 	<ul style="list-style-type: none"> • Chief Architect • TM1/PA Solutions & Product Manager
7	Communication and Evangelism	Gaining broader support and interest in the value of information	<ul style="list-style-type: none"> • Communicating Financial analytics strategy and roadmap • Publishing success stories and progress reports • Supporting user forums, workshops and webinars 	<ul style="list-style-type: none"> • Finance-IT leadership
8	Support	Providing readily available expertise to answer questions and resolve problems	<ul style="list-style-type: none"> • Help desk operation/alignment • Case management, tracking and knowledge base • Support training (troubleshooting) • SLAs and escalation 	<ul style="list-style-type: none"> • DevOps Management
9	IT Governance Alignment	Aligning with IT management and operational processes for greater efficiency and lower risk	<ul style="list-style-type: none"> • Risk management, change management and TM1/PA environment portfolio management • Measures of success and management cadence • Alignment with overall IT governance 	<ul style="list-style-type: none"> • Finance IT Leadership • Chief Architect
10	Master- & Metadata Management (MDM)	Establish a MDM strategy, framework & guidelines	<ul style="list-style-type: none"> • MDM Strategy • MDM Procedures/Guidelines • MDM Framework & Tooling 	<ul style="list-style-type: none"> • Chief Architect • Finance-IT Leadership
11	Business Strategy Alignment	Determining business analytics strategies based on business priorities for maximum ROI and added value	<ul style="list-style-type: none"> • Aligning and mapping TM1/PA analytics initiatives and roadmap to business and corporate strategy • Enterprise roadmap—priorities and initiatives, value determination and validation • Driving cross-functional alignment and enabling business transformation, facilitating cultural change 	<ul style="list-style-type: none"> • Finance IT Leadership