

Performance Reporting & Analysis For Finance

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Driving **Smarter Decisions** for better business outcomes



Planning, Analysis & Forecasting

Profitability Modeling & Optimization

Close, Consolidation, and Reporting

Performance Reporting & Scorecarding

Governance, Risk and Compliance

10
COGNOS

Lessons from the Leaders

The “Best” Rely on Common Reporting & Planning



Source: IBM Institute for Business Value, 2010 IBM Global CFO Study (Adapted)



Delivering reporting quality and assurance for all finance stakeholders

...confidence in the quality and accuracy of financial & management results

...comfort in the integration of relevant information for performance management

...control and audit ability reporting processes

...solutions and systems supporting self service and business insight



CFO



VP Finance



**Controllers
Finance Directors**

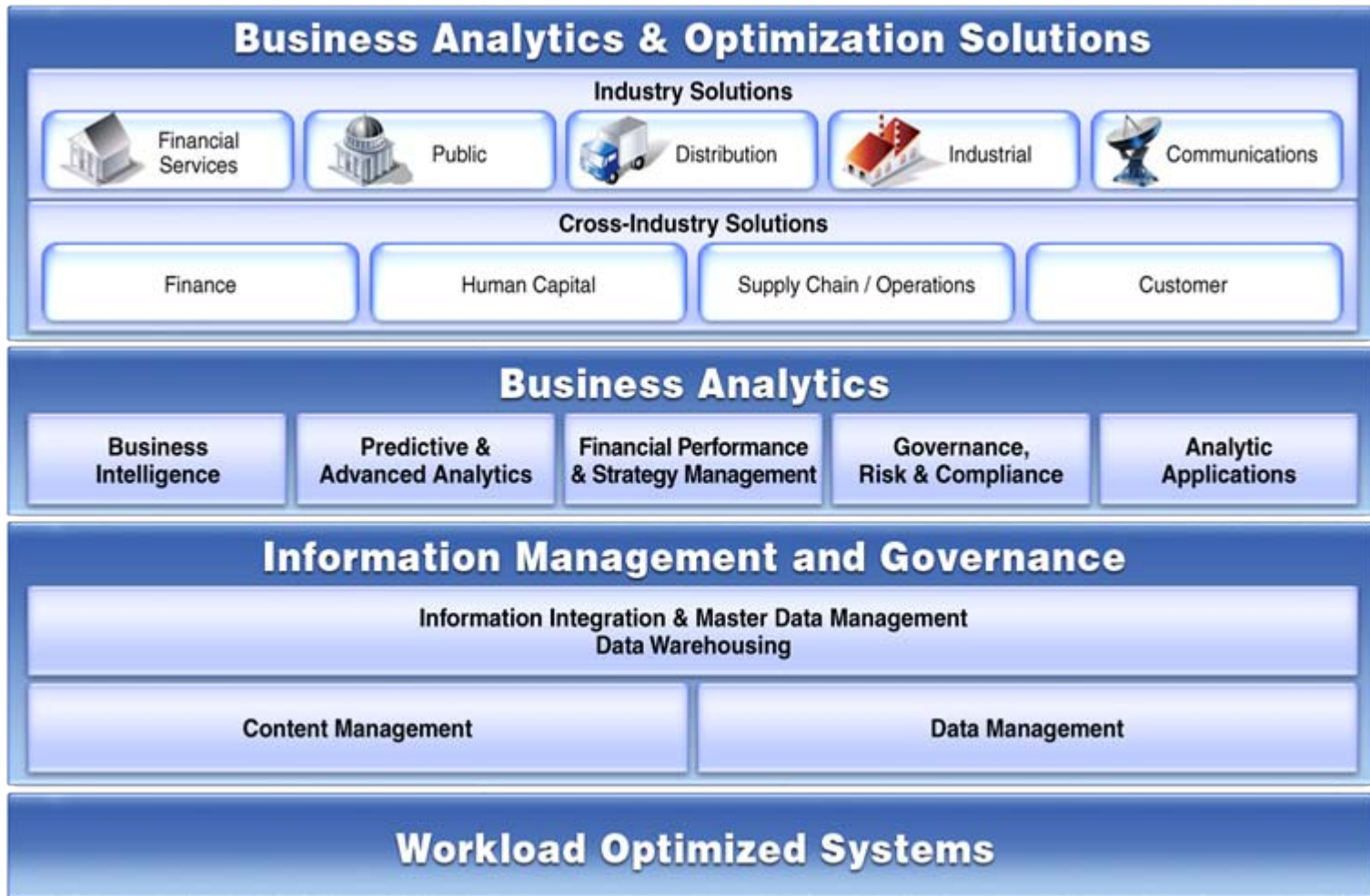


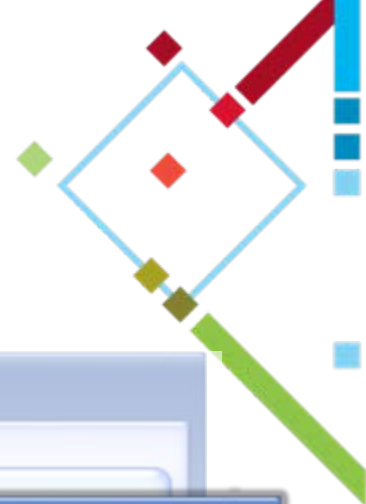
**Accounting &
finance analysts**

...ensure financial & performance results are certified, auditable and available for external and internal decision makers

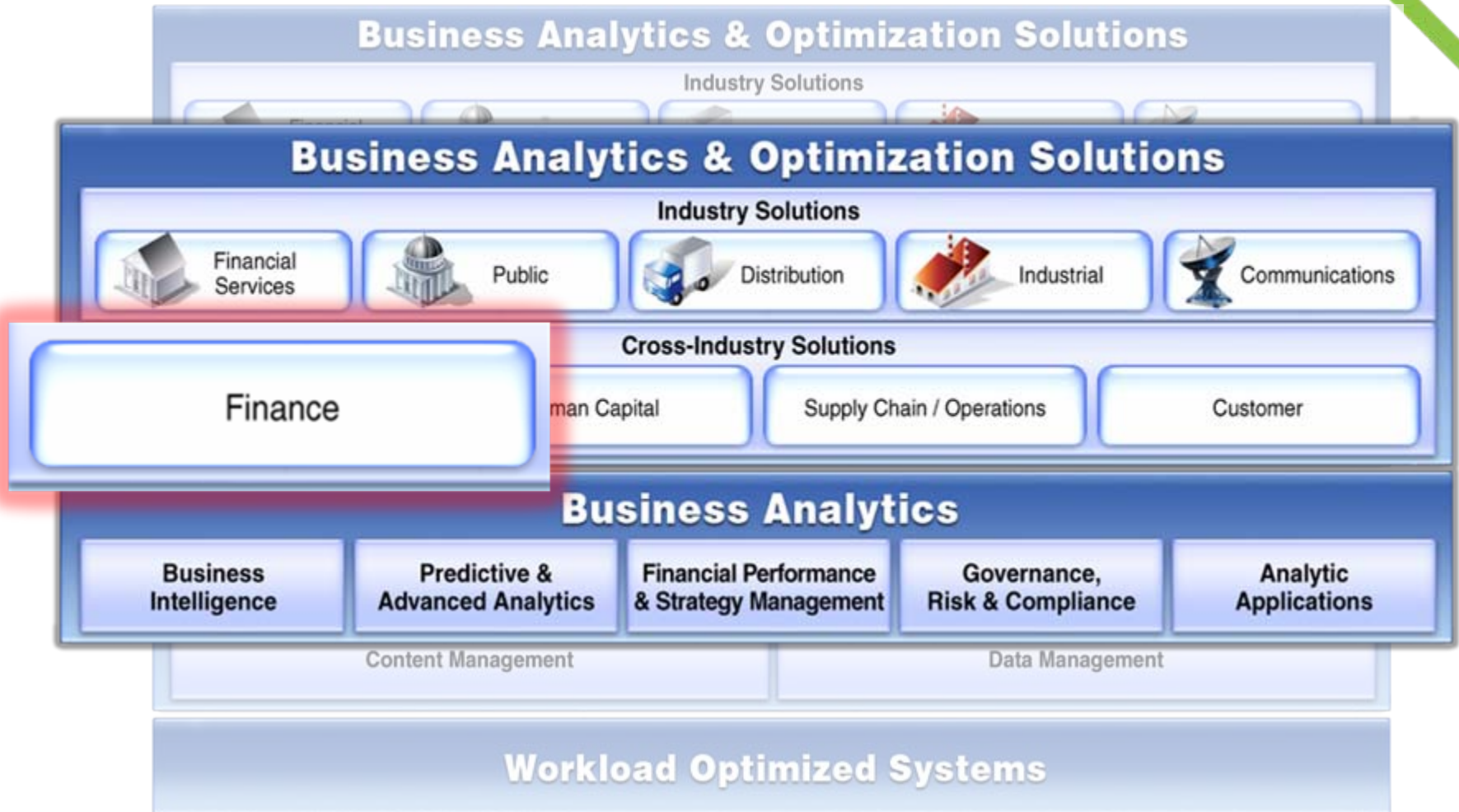


IBM Business Analytics and Optimization



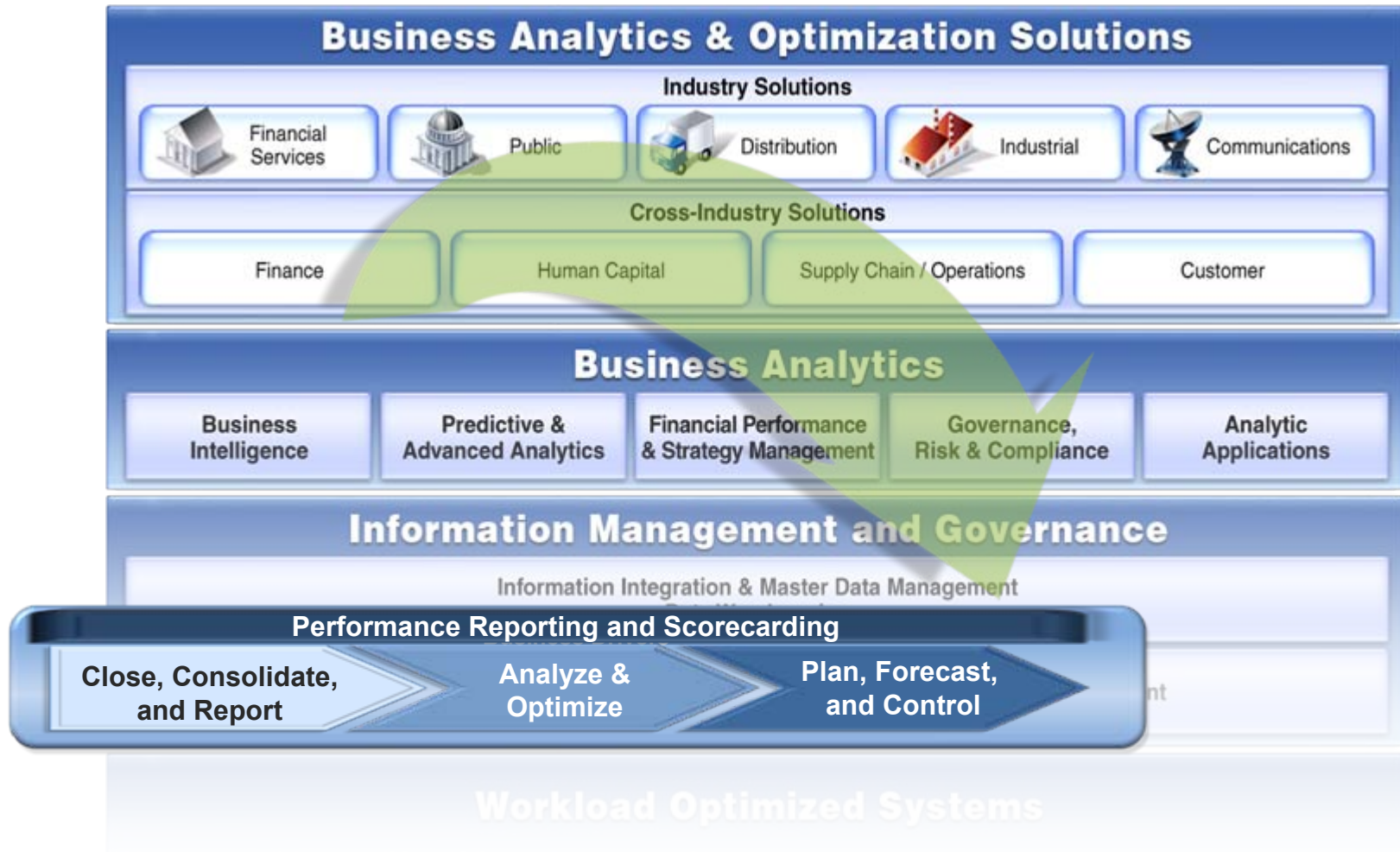


Finance as a Strategic Entry Point





Addressing core financial processes





Performance Reporting & Scorecarding

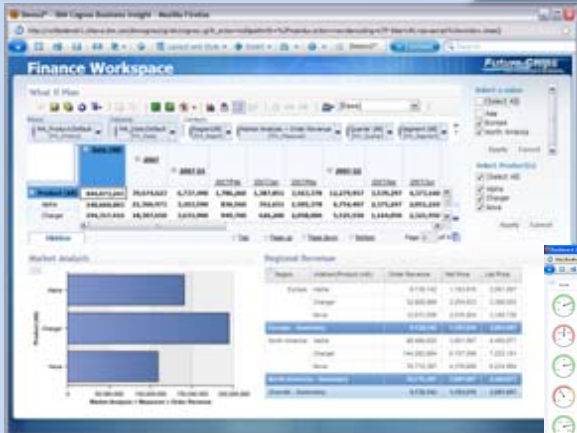
Close,
Consolidation,
and Reporting

Profitability
Modeling &
Optimization

Planning,
Analysis,
& Forecasting

Active Reports

Metrics & Scorecards



Cognos FSR



CFO



Controller



Accounting
Manager



Financial
Analyst



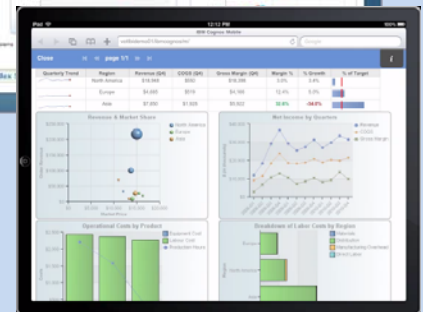
FP & A



Executive



Business
Manager



Governance Risk and Compliance

New insights are delivered through Business Analytics

Optimized Performance



Informed Decisions



Actionable Insights



Trusted Information

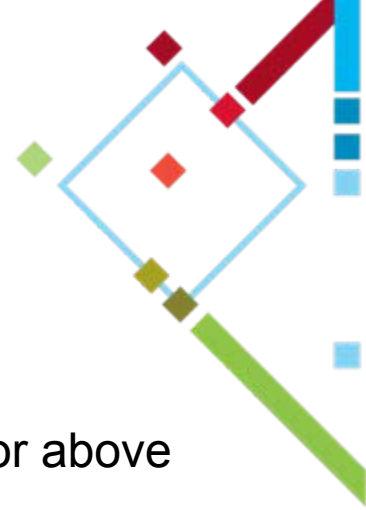




Executive Summary – Key Observations

- The 2010 Business Performance Reporting and Analysis study, **covers general aspects of the Controlling/FP&A service delivery model**, with a particular **focus on key practices and challenges in Business Performance Reporting and Business Analysis**.
- **Top Performers use almost 2/3 less staff than their peers** in the Controlling/FP&A organization relative to the management community they support (“budget holders”).
- **Top Performers also better leverage their Controlling/FP&A professionals** by focusing most of their resources on high value adding activities. Controlling/FP&A professionals at Top Performers spend 66% of time on value-added analysis vs. only 35% at peers.
- **Top Performers are much more confident in the KPIs used in their reporting and the business analysis used for decision support.**
- **Top Performers deliver results to management faster than their peers** allowing management more time to analyze business performance and make better informed, more timely decisions on future actions.
- Key practices that differentiate Top Performers from their peers include **strong process ownership and governance over data and reporting standards, integrated technology extending to self-service and greater alignment around a rationalized library of standard reports.**





Defining Top Performers

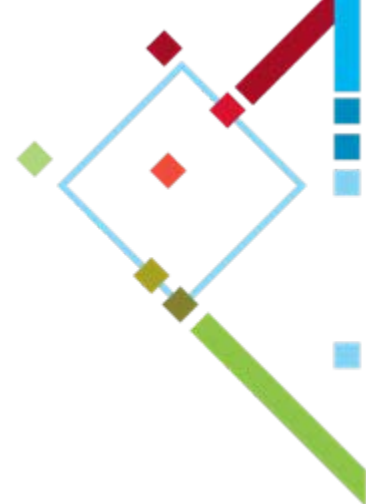
“Top Performers” are defined as those participants achieving median or above performance in the following metrics:

- The ratio of Controllers / FP&A Professionals to Budget Holders
- The percentage of time spent on analyzing data to provide insight vs. collecting and compiling data

Median values in “Top Performer” group

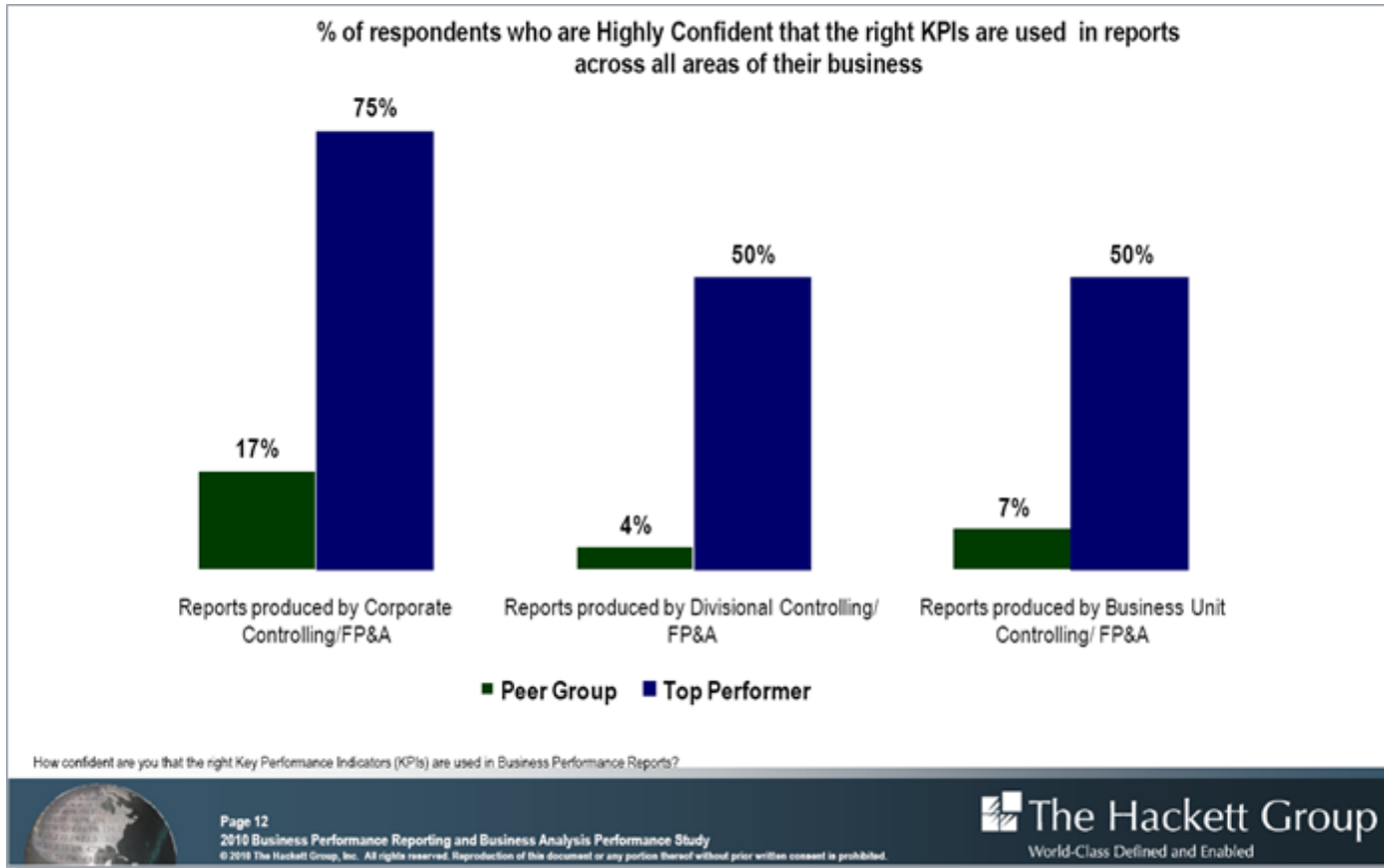
- 66% of time spent on high value adding activities
- 1 Controller / FP&A Professional for every 5.5 Budget Holders

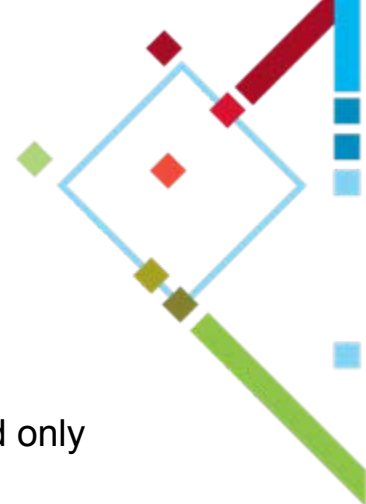
“Budget holders” are employees who are accountable for the day-to-day management of the budgets they hold. They typically interact with the Controllers/ FP&A professionals and drive demand for reports and analysis.



Confidence in information delivery frameworks

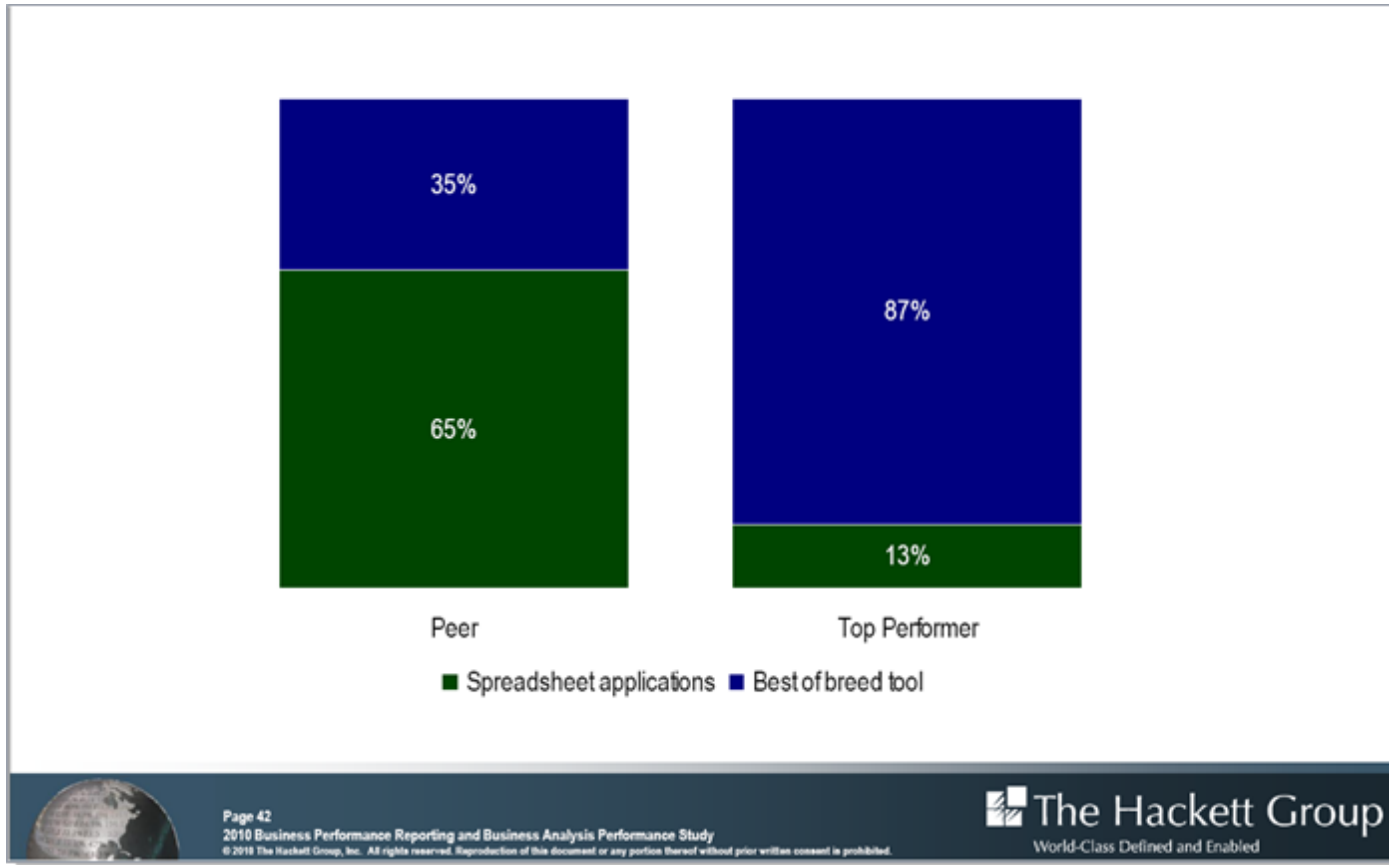
High degree of confidence in their performance reporting frameworks

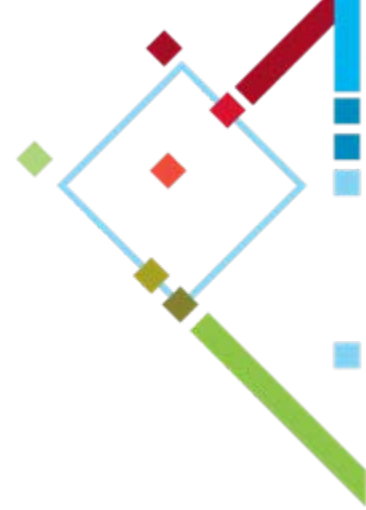




Best in class reporting platform

87% of Top Performers use Best of Breed EPS as their Primary Solution and only 13% is Excel based





Key Drivers for Our Next Wave of Innovation



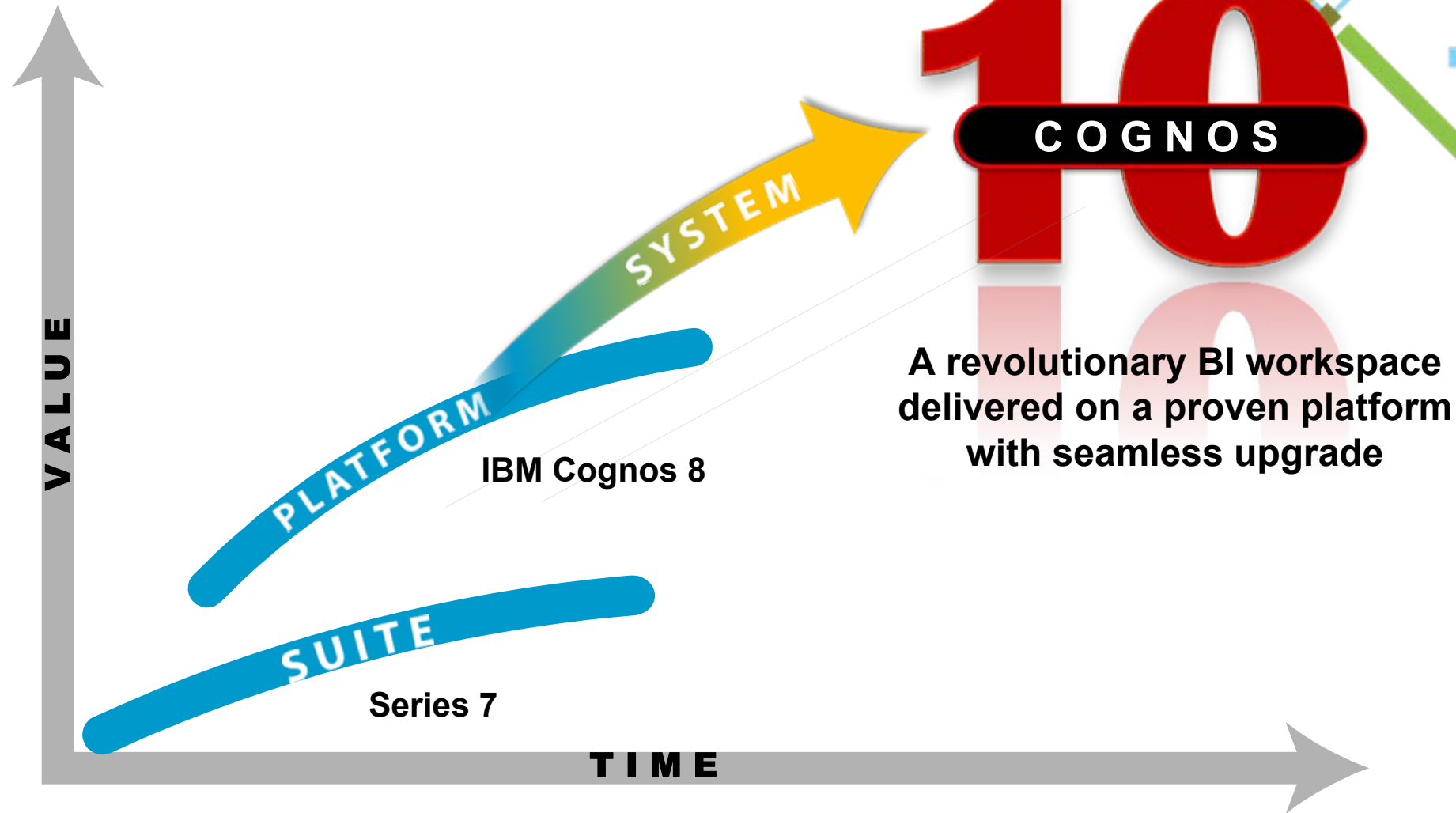
- ...enable an evolving workforce*
- ...expand perspective*
- ...balance needs*
- ...facilitate collaboration*
- ...respond to growing user communities*

“What makes companies stand out from one another is the ability to use analytics across the end-to-end business model.”

IBM CFO study (1)

(1) The New Value Integrator: Insights from the Global Chief Financial Officer Study, IBM Institute for Business Value, March 2010.

Deliver Innovation and Sustained Value



Cognos 10: Intelligence Unleashed Smarter Decisions. Better Results.

Freedom to Think

- Unified workspace
- All time horizons
- Progressive interaction

Connect with Others

- Decision networks
- Business context
- Accountability

and Simply Do

- Mobile and Disconnected
- Integrated
- Real-time



**A revolutionary BI workspace
delivered on a proven platform
with seamless upgrade**

Freedom to Think

Analytics everyone can use to answer key business questions

■ Cognos 10 Advances

- Explore data from any perspective
- Search and assemble any amount of BI content
- Seamless progressing from viewing to advanced analytics





DEMO

Business Insight
Business Insight Advanced

Connect with Others

Collective intelligence to share insights and gain alignment

■ Cognos 10 Advances

- Engage others in decision networks
- Attach comments/annotations to BI content,
- Support workflow to establish accountability



and Simply Do

Actionable insight everywhere at the point of impact

- **Cognos 10 advances**

- Adopt mobile
- real-time analytics
- Integrate analytics in everyday work





DEMO

Office Integration





DEMO

Active Reports





Performance Reporting & Scorecarding

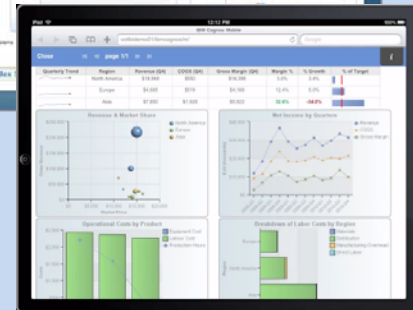
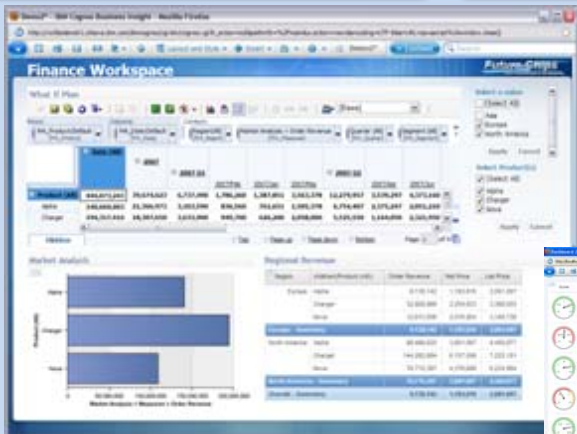
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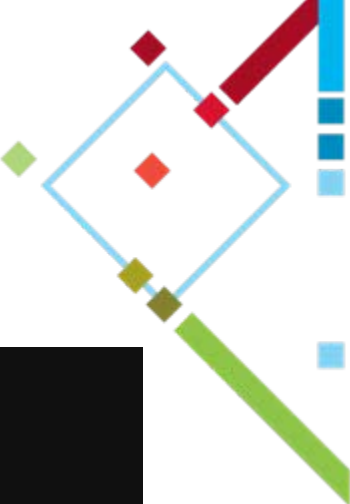


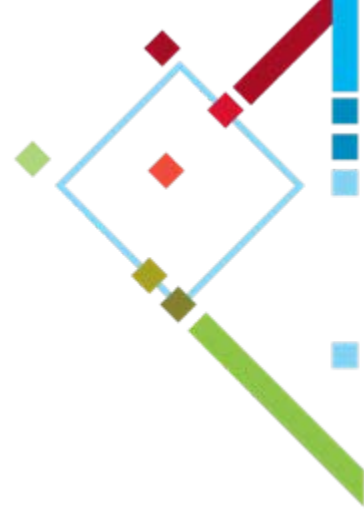
Business
Manager

iPad

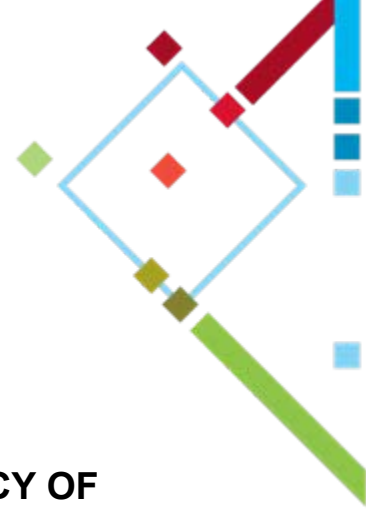
Governance Risk and Compliance

Top Performers





Thank you



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