



2010 IBM Performance Events

Smarter decisions. Better results.

IBM Cognos Express

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Budapest - November 3rd, 2010



Agenda

- Challenges faced by Midsized Organizations
- IBM Cognos Express
- Demo
- Getting Started
- Customer Success Stories
- Summary



Today's Reality

47%

47% of users don't have confidence in their information

42%

42% of managers use wrong information at least once a week

59%

59% say they missed information they should have used

An average company with 1,000 employees spends \$5.3m a year to find information stored on its servers

New Intelligence White Paper from ThinkForward website

The Top Challenges of Midsize Companies

- Improve efficiency and reduce costs
- Strengthen customer relationships, new customer acquisition, and sell more to existing customers
- Predict and respond to trends, optimizing business models

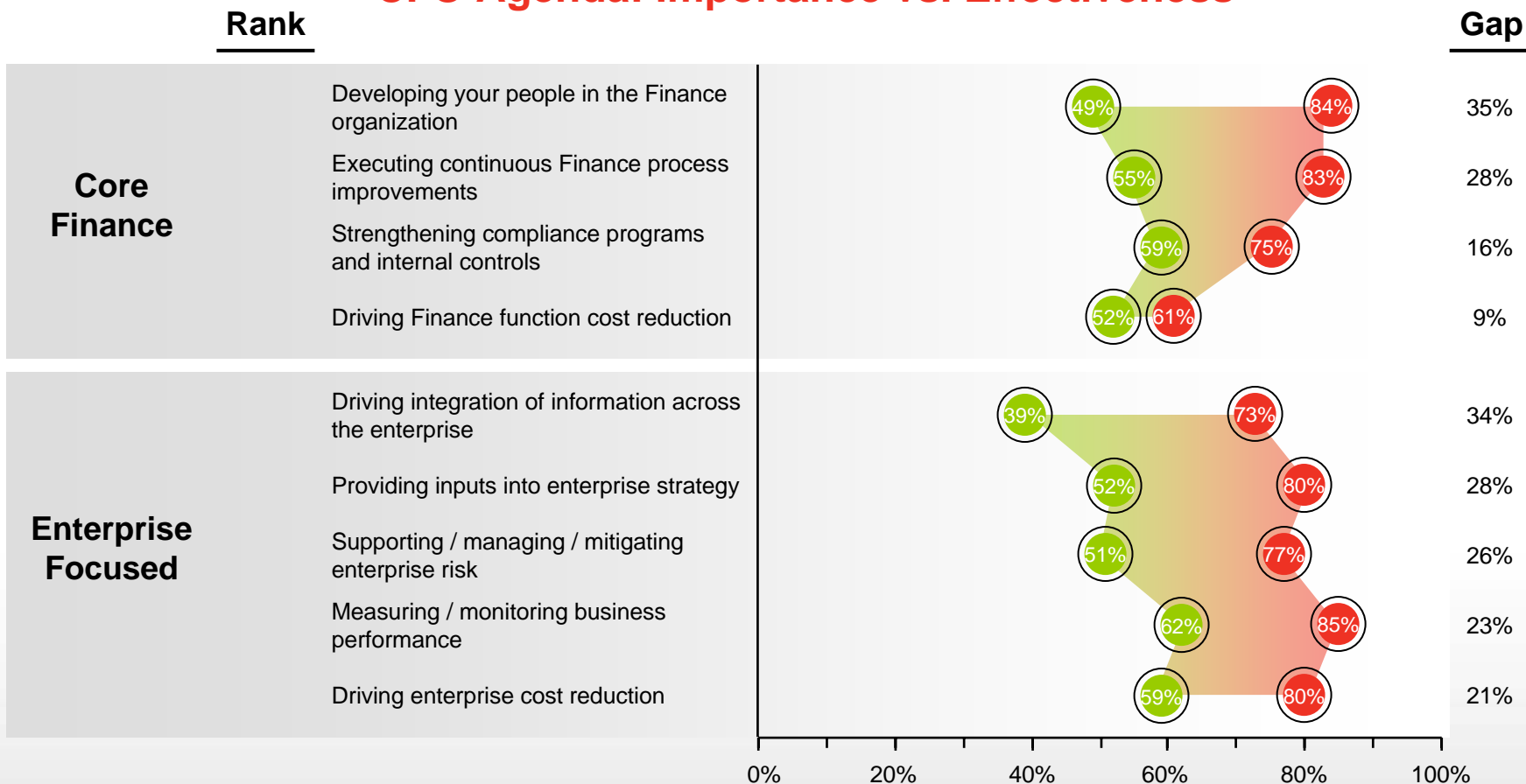


Companies that can best identify new opportunities and quickly align their resources will be the winners.

Finance needs to improve its effectiveness in order to deliver on the enterprise agenda

● Importance
● Effectiveness

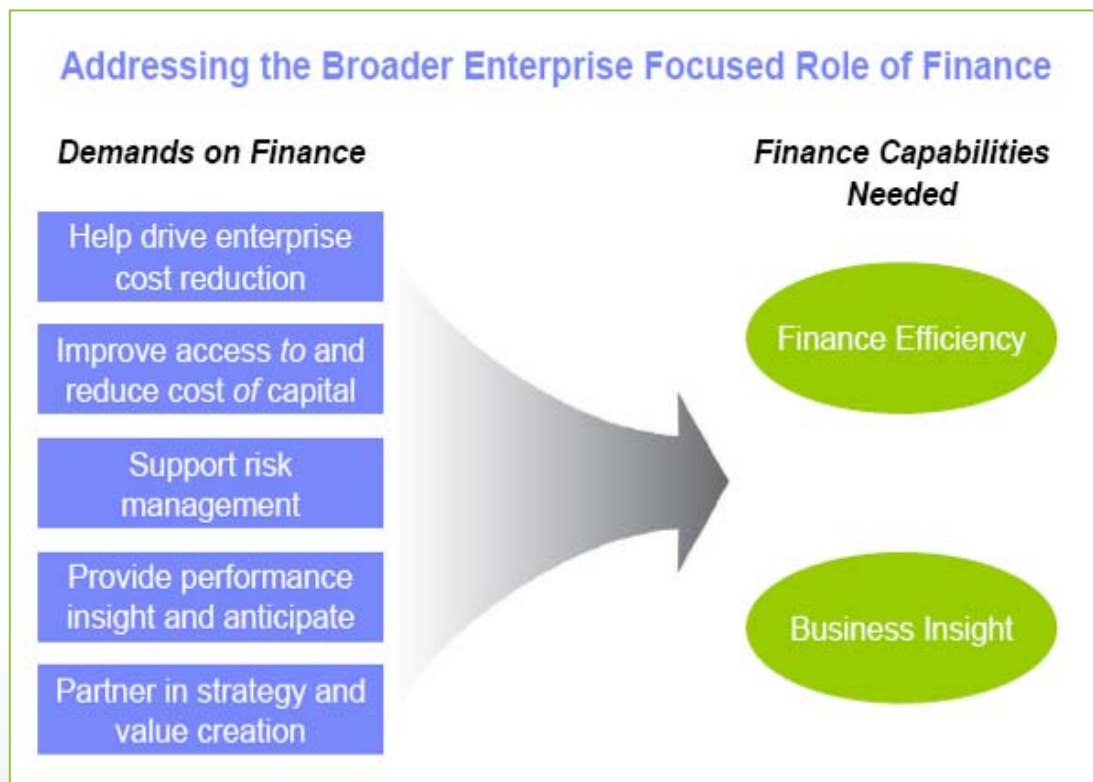
CFO Agenda: Importance vs. Effectiveness



N = 1,834 Note: Executives asked: How important to your Finance organization are each of following areas of responsibility? and How effectively do you think your Finance organization is performing in each of those areas? And Please rank your top 3. Importance defined as enterprises selecting [5] Critical and [4] on a 5-point scale where [5] Critical and [1] Unimportant. Effectiveness defined as enterprises selecting [5] Very Effective and [4] on a 5-point scale where [5] Very Effective and [1] Ineffective

Source: IBM Institute for Business Value, The Global CFO Study 2010

This requires improved finance efficiency and business insight



Source: IBM Global 2010 CFO study

Think and act differently

Traditional behavior:

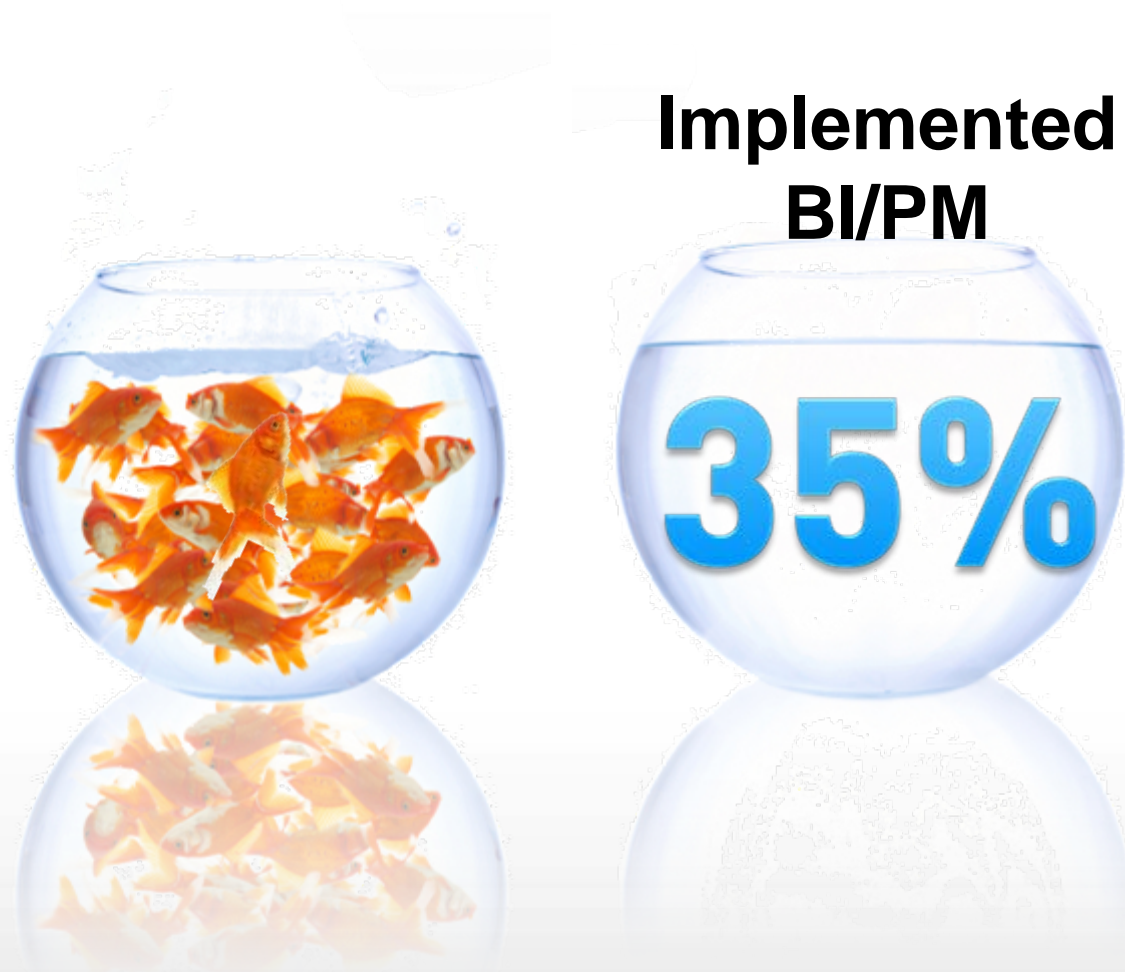
- Information Collector
- Tactical View
- Passive
- Risk Averse
- Process Re-engineering (Revolution)
- Manually, isolated
- Lagging



Performance behavior:

- Information Analyzer
- Strategic Analysis
- Active / Interactive
- Risk Aware
- Continuous improvement and innovation (Evolution)
- Automate & integrate
- Leading

Reality....



Barriers

Implemented BI



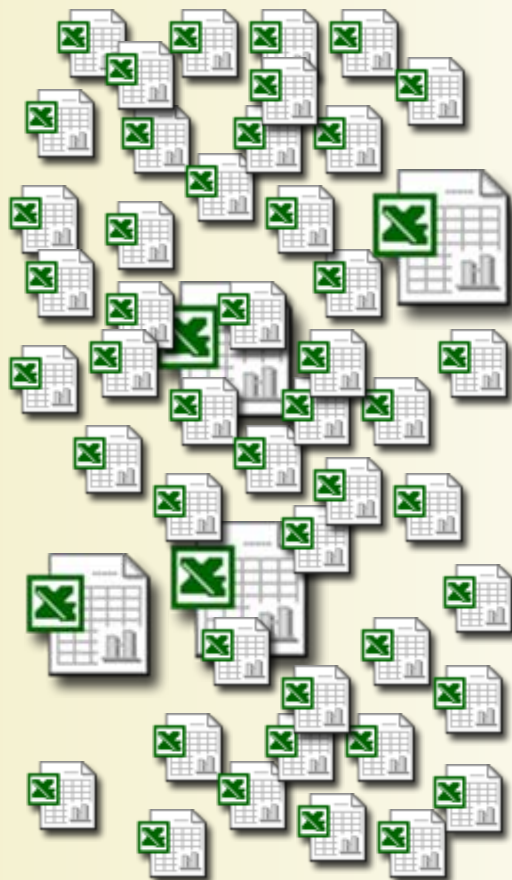


How many midsize companies do BI and Planning

Data Sources



Reporting, Analysis, Planning



Risks and Limitations

- Silos of data**
- No Data Integrity**
- Inaccurate and inconsistent**
- No Audit-ability**
- Poor efficiency and effectiveness**
- Competitive Advantage?**
- Institutional knowledge embedded into custom formulas**

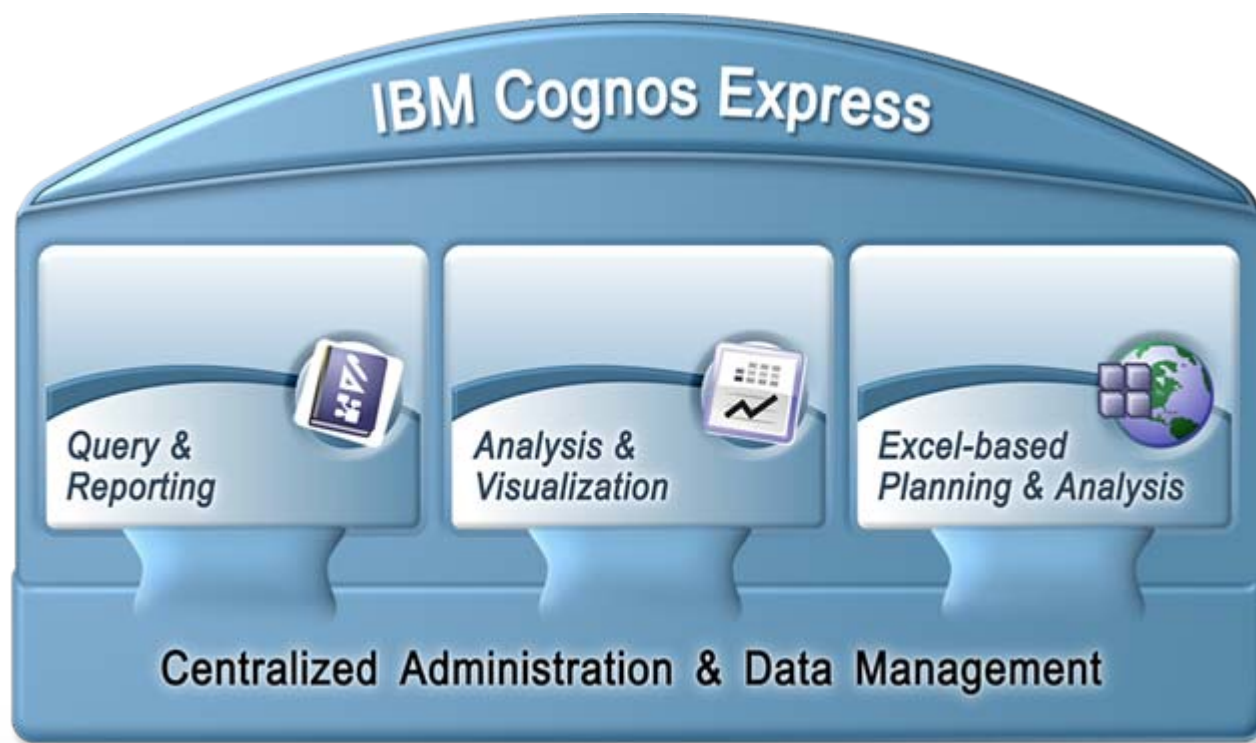
Inconsistent Information, Untrustworthy Analysis, Disconnected Planning



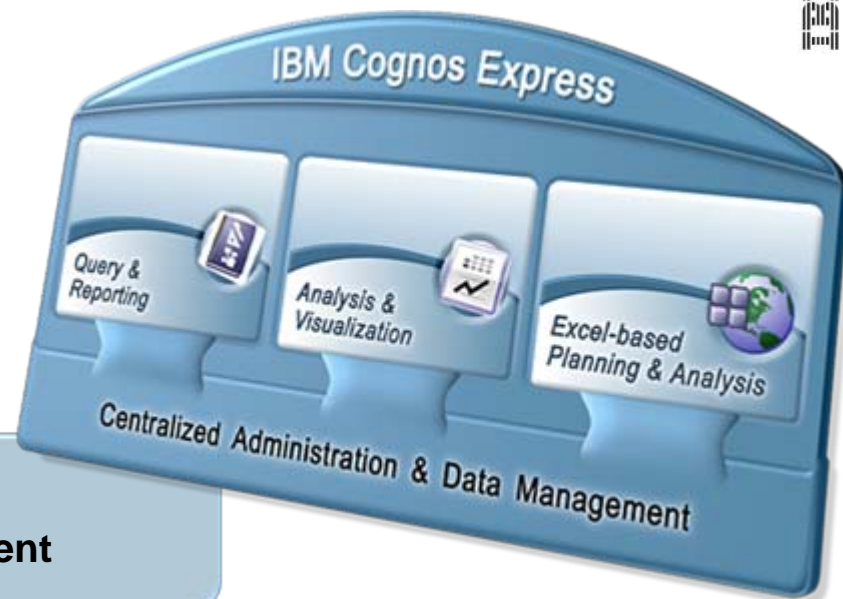
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Introducing IBM Cognos Express



The only integrated Reporting, Analysis and Planning solution purpose built for midsize companies.



Easy to Install

Pre-configured solution includes everything required for simple deployment and management

Easy to Use

Self-service access empowers business users and removes the burden from IT

Easy to Buy

Packaged and priced right... Start small, start anywhere, deliver immediate value, and grow





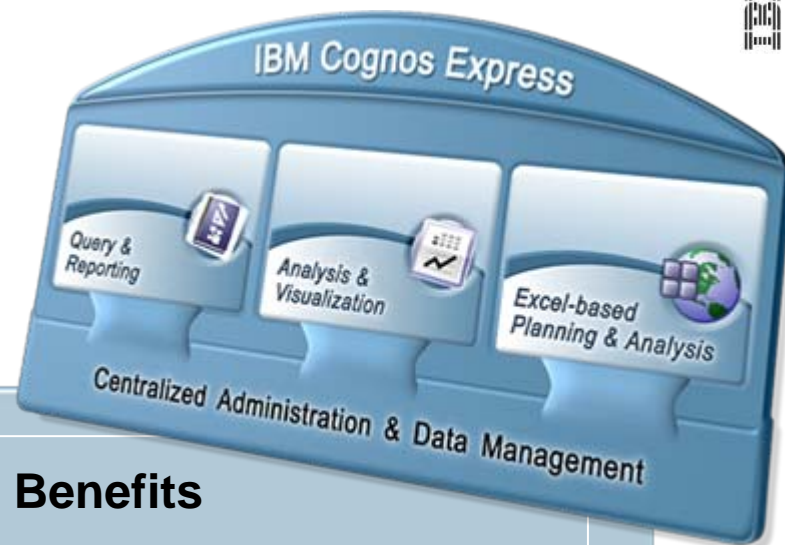
Easy to Install

- Preconfigured “No assembly required”
- All you need - Embedded
 - OLAP
 - Security
 - Content store
 - Web server
 - Data integration
- Central management console

Benefits

- No hidden costs
- Minimum resource needed
- Quick time to value





Easy to Use

- Novice to advanced Users
- Simple business view creation
- Data viewed in business context
- Right interface for the right user
- Flexible delivery model

▪ **Benefits**

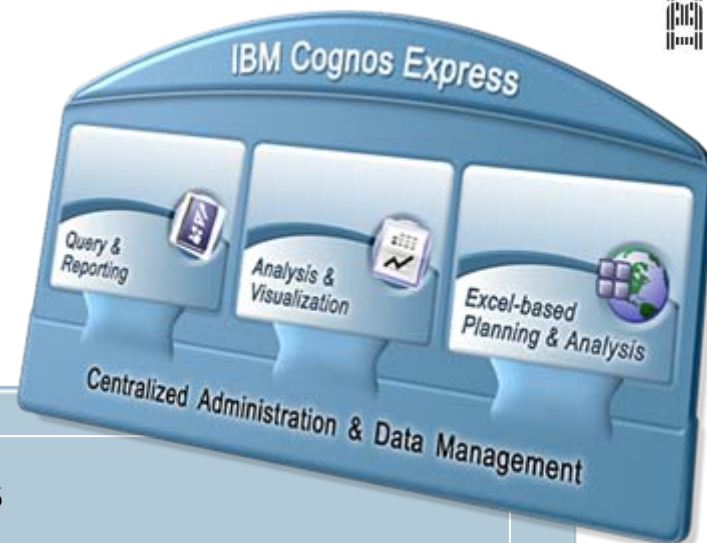
- Reduce IT Backlog
- Reduce burden on IT
- Business empowered
- Minimum resource needed
- Quick time to value

Easy to Buy

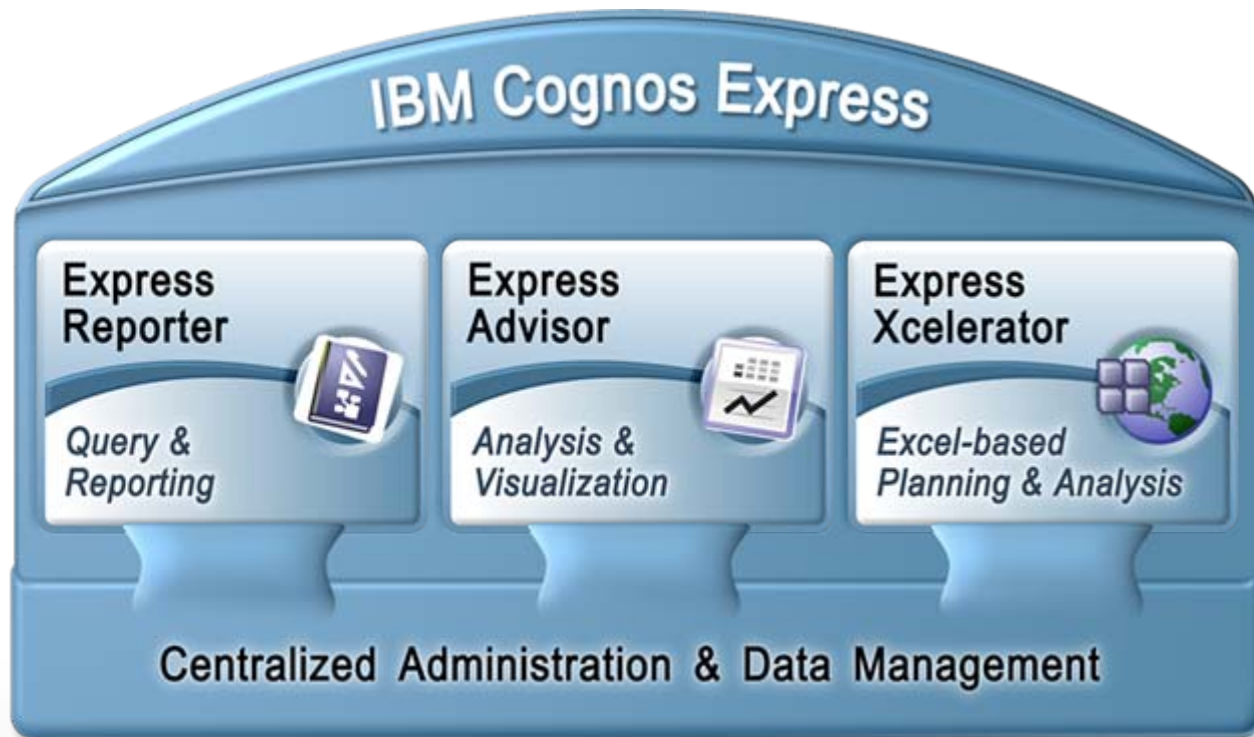
- Buy what you need and when you need it
- Low entry price point
- No hidden costs
- Room to grow
- Affordable

■ Benefits

- Start small, start anywhere
- Match projects to match resource and budget constraints
- Quick time to business value
- Low risk



IBM Cognos Express





■ Self-service reporting and ad hoc query

- Simple, intuitive authoring for novice to experts
- Different reports to meet the needs of different users
- Breadth of report coverage – operational, transactional, dashboards, ad hoc
- Connect to any type of data and in any combination – relational, OLAP, desktop files
- Flexible report delivery via web interface, PDF, Excel, email or Portal



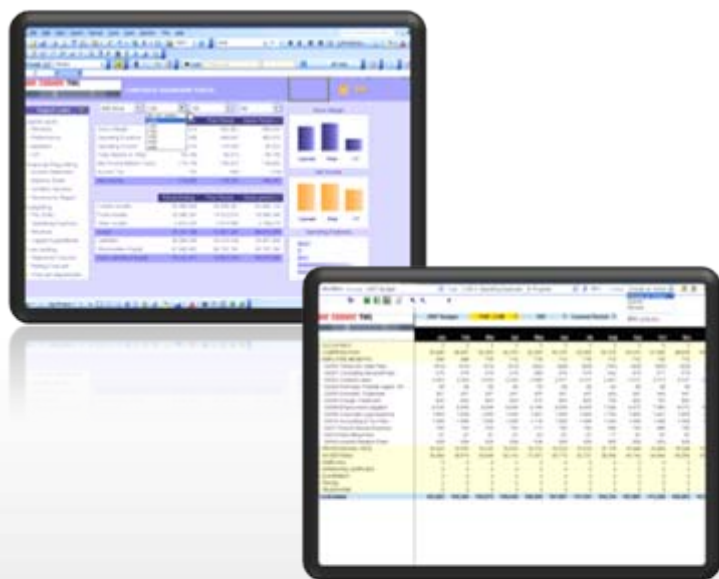


- **Freeform analysis and visualization**
 - Real-time analysis with in-memory multidimensional capability
 - Slice and dice, drill down capabilities
 - High impact data visualizations
 - Simplified business view creation and building
 - On the fly business view changes
 - ‘What if’ scenarios with write back
 - Embed live content into MS Office applications



- **Excel-based planning and business analysis**

- Extends the familiar Excel front-end with a powerful in-memory analytics engine for multi-dimensional analysis, reporting and planning
- Centrally managed data, business hierarchies, rules, calculations
- Excel or Web Interface
- Business scenarios with powerful “what if” modeling and write back
- Role-based security and clear audit trails
- Workflow management

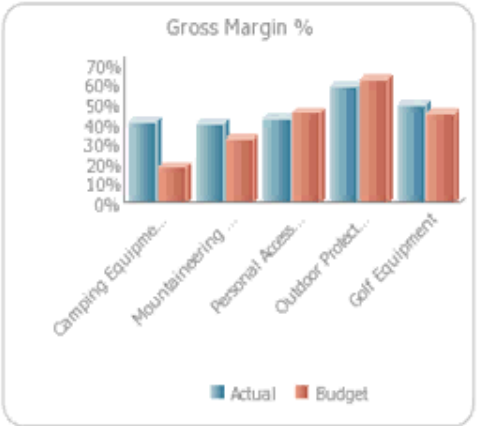




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Sales and GM% Analysis



Top Five Customers

Past 12 Months	Revenue	Customer	Growth Rank
	\$20,895,285.06	Grand choix	46% 1
	\$13,219,610.69	VIP Department Stores	(12%) 3
	\$20,271,870.30	Chen Yu Enterprise Co.,	6% 2
	\$11,498,744.23	Leisure Land	(34%) 5
	\$11,743,190.76	Artículos de Campismo El Aquila, S.A. de C.V.	565% 4

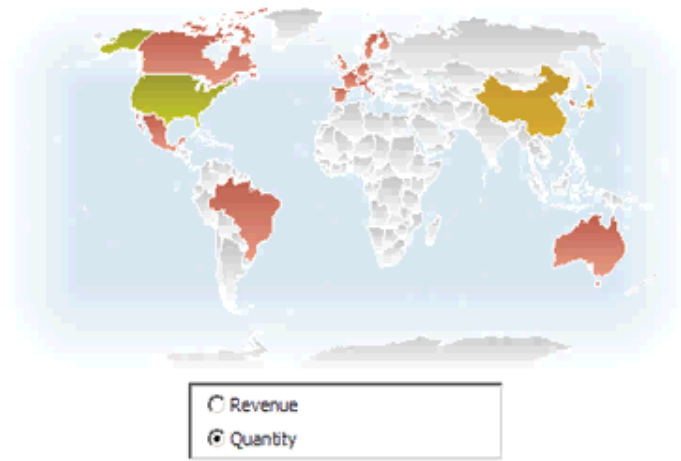
Target (Millions)

Key Performance Indicators

Time-Months March 2007
Currencies USD

KPI	Actual	Target	Variance	Comment
Asset Utilization Ratios				
Sales to Account Receivable	2.40	2.20	0.20	...owner: J. Reyes (Finance)
Sales to Inventories	0.97	0.97	0.00	
Sales to Working Capital	0.58	0.55	0.03	...last review: December 15th by C. Beltran
Liquidity Ratios				
Current Ratio	2.73	2.40	0.33	
Days to Sell Inventory	215	175	-40	...
Accounts Receivable Turnover	2.28	2.25	-0.03	
Inventory Turnover	0.60	0.59	-0.01	...upcoming review scheduled for April 1st
Accounts Receivable to Total Assets	0.08	0.08	0.00	

Location Analysis





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Think Big. Start Small.

A smart approach for a midsize company

Think Big

- Connect BI and Planning – to drive action from insight
- Build an information driven culture
- Provide a glide path to future enterprise-class requirements

Start Small

- Start anywhere.
(Reporting, Analysis... etc)
- Create a roadmap that builds on small successes
- Modular and incremental strategy
- Deploy tactically yet ensure initiatives are connected

Benefits

- ✓ **Enables project rollout to match resource capacity and budget**
- ✓ **Realize business benefit quickly**
- ✓ **Provides justification for further investment**
- ✓ **Allows adjustments to respond to changes in business objectives**



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Central National-Gottesman Inc.

Lindenmeyr Book Publishing
 Lindenmeyr Central
 Lindenmeyr Munroe
 CNG Specialty Papers
 CN Division



- **Key Business Requirement**
 - Needed a low-cost, easily installed solution that was integrated, easy to use and accessed by the Web.
- **Approach**
 - To implement a solution that could consolidate data, streamline reporting and improve business performance.

Challenge	Solution	Results
<ul style="list-style-type: none"> ▪ All reporting from ERP or spreadsheets, with limited reporting capabilities ▪ Data was pushed to users (e.g., sales force) via spreadsheet and email ▪ IT had backlog of reporting requests 	<ul style="list-style-type: none"> ▪ IBM Cognos Express 	<ul style="list-style-type: none"> ▪ Process improvement efficiencies in the comptrollers office (time, gained three days every month) ▪ Ease of use over the Web ▪ Improved structure and format of data ▪ One data set – one version of the truth ▪ Ease of deployment ▪ Structured formats for data entry and reporting



- **Key Business Requirement**
 - Needed a scalable system to control purchasing through better information, without losing plant independence or requiring extensive in-house technical expertise.
- **Approach**
 - To purchase an all-in-one solution to consolidate data from disparate sources and facilitate consistency in vendor and spending information.

Challenge	Solution	Results
<ul style="list-style-type: none"> ▪ Gain control over company purchasing ▪ Improve visibility into vendor information ▪ Facilitate company growth and expansion ▪ Improve data quality ▪ Promote better standards adoption ▪ Eliminate cumbersome data transfers to Excel 	<ul style="list-style-type: none"> ▪ IBM Cognos Express 	<ul style="list-style-type: none"> ▪ Provides central source for supplier pricing and delivery review ▪ Provides comparative supplier information ▪ Increases productivity and identifies cost savings opportunities ▪ Automated notifications and reporting

INFRASTRUCTURE

NETWORKING

PHYSICAL SECURITY



- **Key Business Requirement**
 - With the company's growth, the spreadsheet system they used for budgeting had become too complex
- **Approach**
 - To find an easy-to-use, single-platform tool for budgeting and forecasting

Challenge

- To complex and unwieldy spreadsheet system
- To improve time-consuming budgeting and forecasting processes that produced inaccurate results
- To accurately compare actuals against budgets at various levels

Solution

- IBM Cognos Express

Results

- Provides a single version of the truth
- Fast time to value with quick implementation and ease of use
- Alignment with budgets, P&L and distribution resource management
- Allows remote access to more accurate and detailed information than before



- **Key Business Requirement**
 - GPdis needed to install a centralized financial reporting solution as they consolidated IT operations.
- **Approach**
 - To implement a complete, modular solution that could provide sophisticated reporting, analysis and planning capabilities to this recently-merged organization.

Challenge	Solution	Results
<ul style="list-style-type: none"> ▪ Needed to consolidate figures from 60 profit centers, from across 30 companies. ▪ Reporting and analysis needs were no longer met with spreadsheets ▪ Needed to analyze data based on various criteria: by company, product, area, etc. 	<ul style="list-style-type: none"> ▪ IBM Cognos Express 	<ul style="list-style-type: none"> ▪ Saves time ▪ Improves accuracy of data ▪ Quick user adoption, as users can work with a familiar MS Excel interface. ▪ Modular, allowing GPdis to expand on implementation in the future.



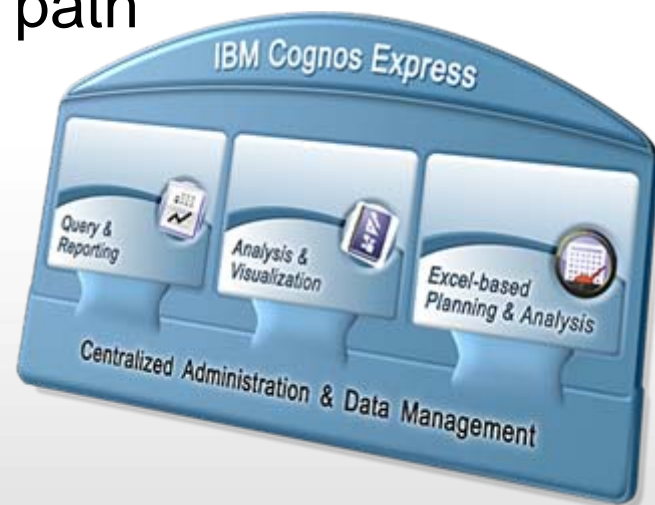
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Summary

Cognos Express is the only midmarket product that delivers integrated Reporting, Analysis and Planning

- Purpose-built for midsize companies
- Prepackaged – requiring no assembly
- Modular and provides complete growth path
- Empowers all users with self-service
- Easy to install, use and buy!



Additional Information & Assets



Welcome to the world of championship high performance.

Connect. Collaborate. Innovate.

The IBM Cognos® Innovation Center for Performance Management is a forum and resource center that was created to assist organizations seeking innovative concepts, functions and business practices that they can use to achieve higher levels of performance.

The Innovation Center brings together technology experts, finance professionals and performance management thought leaders to promote proven techniques, technologies and best practices in performance management. Connect with peers and industry leaders as you learn from their experience.

Desktop Widget

The Cognos Innovation Center desktop widget enables delivery of the latest resources, news and events directly to

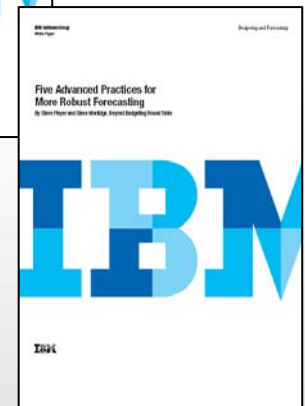
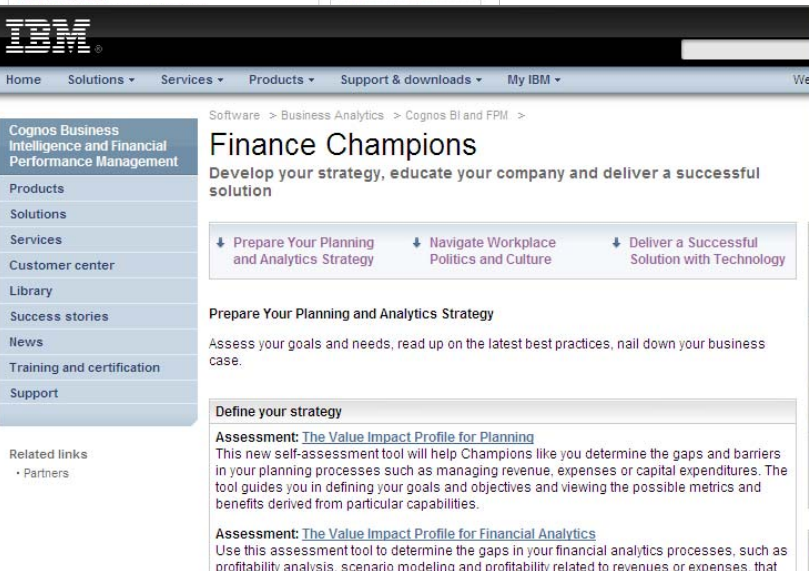
Live Events

Join us in a city near you for workshops that will discuss best practices and strategy:

- [Strategy Execution](#)
- [Rolling Forecasts](#)

Cognos Innovation Center Communities

- [Innovation Center Online Community](#)
- [Follow us on Twitter](#)



Accelerated Success



Planning the Journey

- C-Level Studies (IBM Research)
- The Performance Manager Book
- Product and Solution Demonstrations

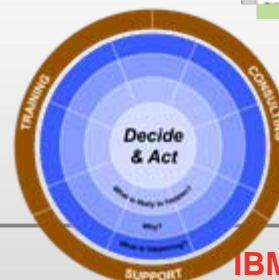
Getting a Fast Start

- Industry Blueprints
- Analytic Applications
- Mid-Market Application

Extending the Value

- Innovation Center
- Champion's Kit
- Performance Management Workshops
- Education, Training & Services

And link up with local experts



IBM PERFORMANCE EVENTS



Performance Pain

- Need for greater accountability, deeper in the organization
- Need to centralize expense planning
- Need for more consistent views of data

IBM Cognos software Impact

- Provide centrally managed data to analyst communities so they can focus on providing the value-added analysis to drive business;
- Reduce its application footprint;
- Reduce the IT delivery expense associated with supporting the finance function;
- Focus on end-user productivity by streamlining data delivery, providing the right metrics to individuals based on their roles.

- Improved ability to identify drivers of top-line revenue growth, analyze expense constraints, identify risk and address SOX compliance issues.
- Centralized planning reduced the footprint for financial planning by retiring 20 disparate applications
- Able to preserve analytics and reporting flexibility while driving more standardization.

“Finance can focus on providing value-add analytics to drive the business.”

***Marc Berson,
Director Business Analytics,
IBM Corporation***



Thank
YOU

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