



Business Analytics Live 2012 for Finance

The Premier Event for Finance Professionals

WELCOME

Mark Fieldhouse

Business Unit Executive, IBM Business Analytics



AGENDA



TIME	DESCRIPTION			
9.45	Welcome Mark Fieldhouse, Business Unit Executive - IBM Business Analytics			
10.00	The Changing Face of the Annual Report - implications for the Finance Function Andy Smyth, Partner, Financial Accounting Advisory Services, Ernst & Young LLP			
10.40	Keynote: Smarter Analytics for Performance Achievement Doug Barton, Director, Product Marketing, Performance Management, IBM Business Analytics			
11.20	BREAK			
11.45	Finance Transformation – dragging finance into the 21st Century with detailed analytics Steve Umpelby, CFO EMEA, Tradition Ltd			
12.25	Transforming Finance Operations Pat Calitri, Business Unit Executive, Financial Close Management, IBM Business Analytics			
13.00	LUNCH			
14.00	Cognos FSR in American Express Paul Nugent, Director Controller – Strategy and Performance Improvement, American Express			
14.40	Panel Discussion and Q&A			
15.00	Wrap up Mark Fieldhouse, Business Unit Executive - IBM Business Analytics			
15.10	BREAK			
15.30	Cognos FSR Customer Advisory Board (CAB)	Cognos Controller Customer Advisory Board (CAB)	Cognos TM1 Customer Advisory Board (CAB)	Business Analytics Live - Software in Action
17.45	Close			
	NETWORKING RECEPTION			

Today's organizations are facing many **DISRUPTIVE FORCES** fueling the need for analytics

1 The emergence of a new data era

Creating new opportunities to capture meaningful information from new varieties of data and content coming at organizations in huge volumes and at accelerated velocity



2 The shift of power to the consumer

Creating the need for organizations to understand and anticipate customer behavior and needs based on customer insights across all channels



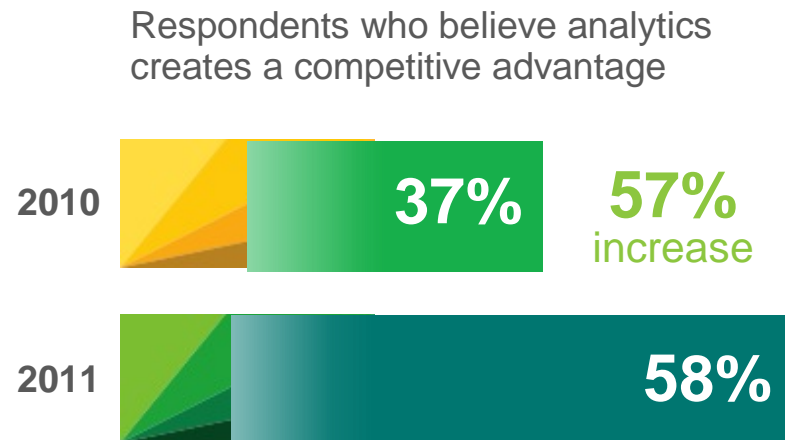
3 Accelerating pressure to do more with less

Creating the need for all parts of the organization to optimize all of their processes to create new opportunities, to mitigate risk, and to increase efficiency



Organisational pressures are at a point where analytics has evolved from business initiatives to **BUSINESS IMPERATIVES**

More organization are using analytics to create a competitive advantage



Source: The New Intelligent Enterprise, a joint MIT Sloan Management Review and IBM Institute of Business Value analytics research partnership. Copyright © Massachusetts Institute of Technology 2011

And leaders are outperforming their competitors in key financial measures

1.6x Revenue Growth

2.0x EBITDA Growth

2.5x Stock Price Appreciation

Source: *Outperforming in a data-rich, hyper-connected world*, IBM Center for Applied Insights study conducted in cooperation with the Economist Intelligence Unit and the IBM Institute of Business Value. 2012

ANALYTIC-DRIVEN ORGANIZATIONS are distinguished by their ability to leverage ...

All information

- All information
- Transaction data
- Application data
- Machine data
- Social data
- Enterprise content

All perspectives

- Past (historical, aggregated)
- Present (real-time)
- Future (predictive)

All people

- All departments
- Experts and non-experts
- Executives and employees
- Partners and customers

All decisions

- Major and minor
- Strategic and tactical
- Routine and exceptions
- Manual and automated



...focusing on high-value initiatives in core **BUSINESS AREAS**

1

Customers



Examples:

- Advanced client segmentation
- Leveraging customer sentiment analysis
- Reducing customer churn

2

Finance



- Enabling rolling plan, forecasting and budgeting
- Automating the financial close process
- Delivering real-time dashboards

3

Risk



- Making risk-aware decisions
- Managing financial and operational risks
- Reducing the cost of compliance

4

Operations



- Optimizing the supply chain
- Deploying predictive maintenance capabilities
- Transform threat & fraud identification processes

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Join in the conversation using
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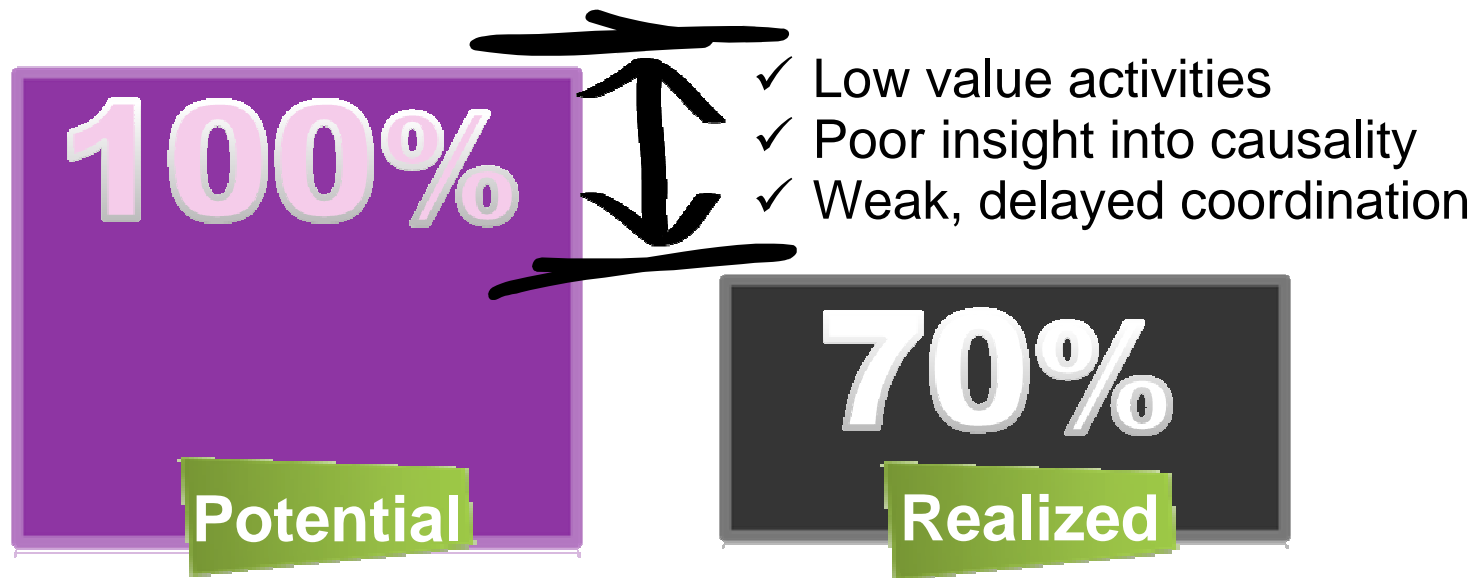
Smarter Analytics for Performance Achievement

Doug Barton

08 November 2012

IBM Southbank Forum



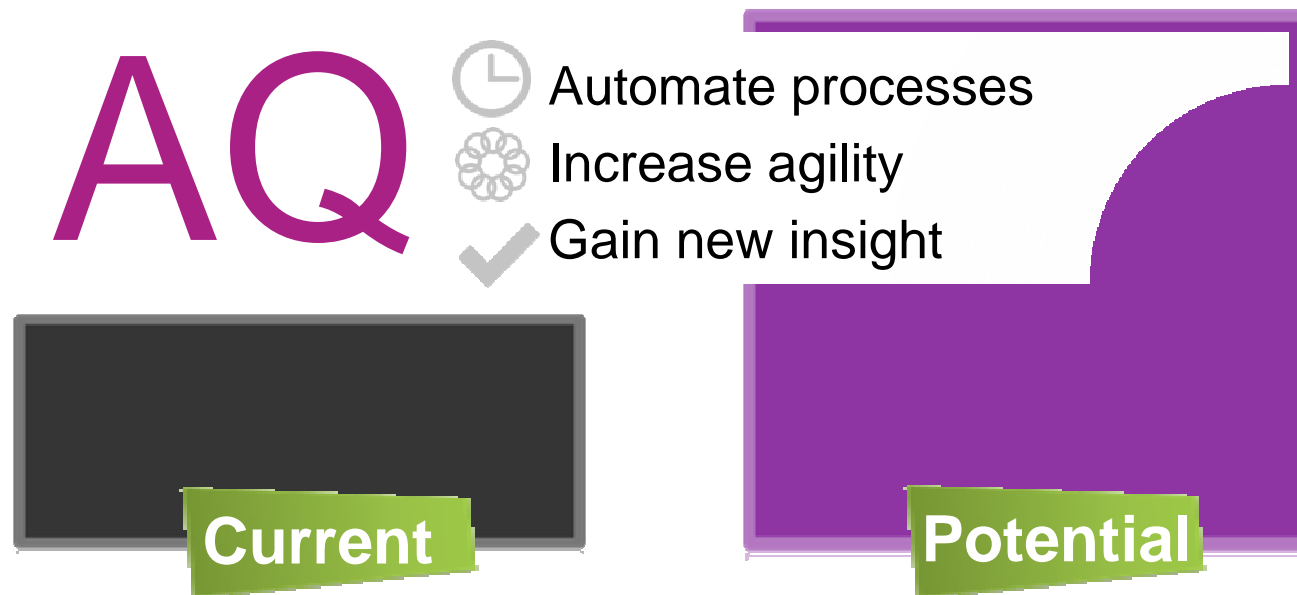


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30% of performance potential is lost due to
subpar performance management

Source: CFO Executive Board 2011; IBM Analysis



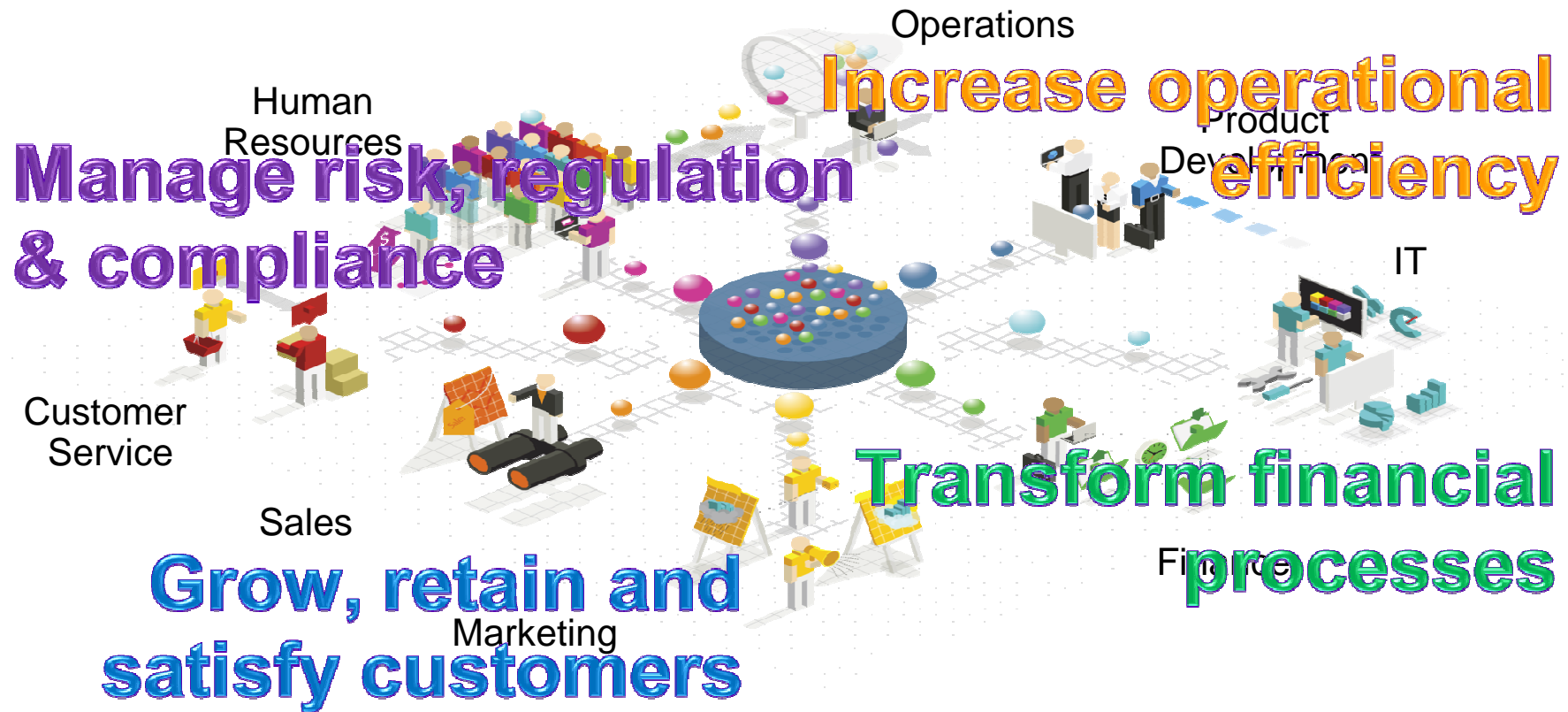


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The more you infuse analytics into your business, the higher your AQ and the better you and your business will perform



Smarter Analytics Drives Performance Achievement



Finance is at the forefront of this transformation



Manage risk, regulation
& compliance

Increase operational
efficiency



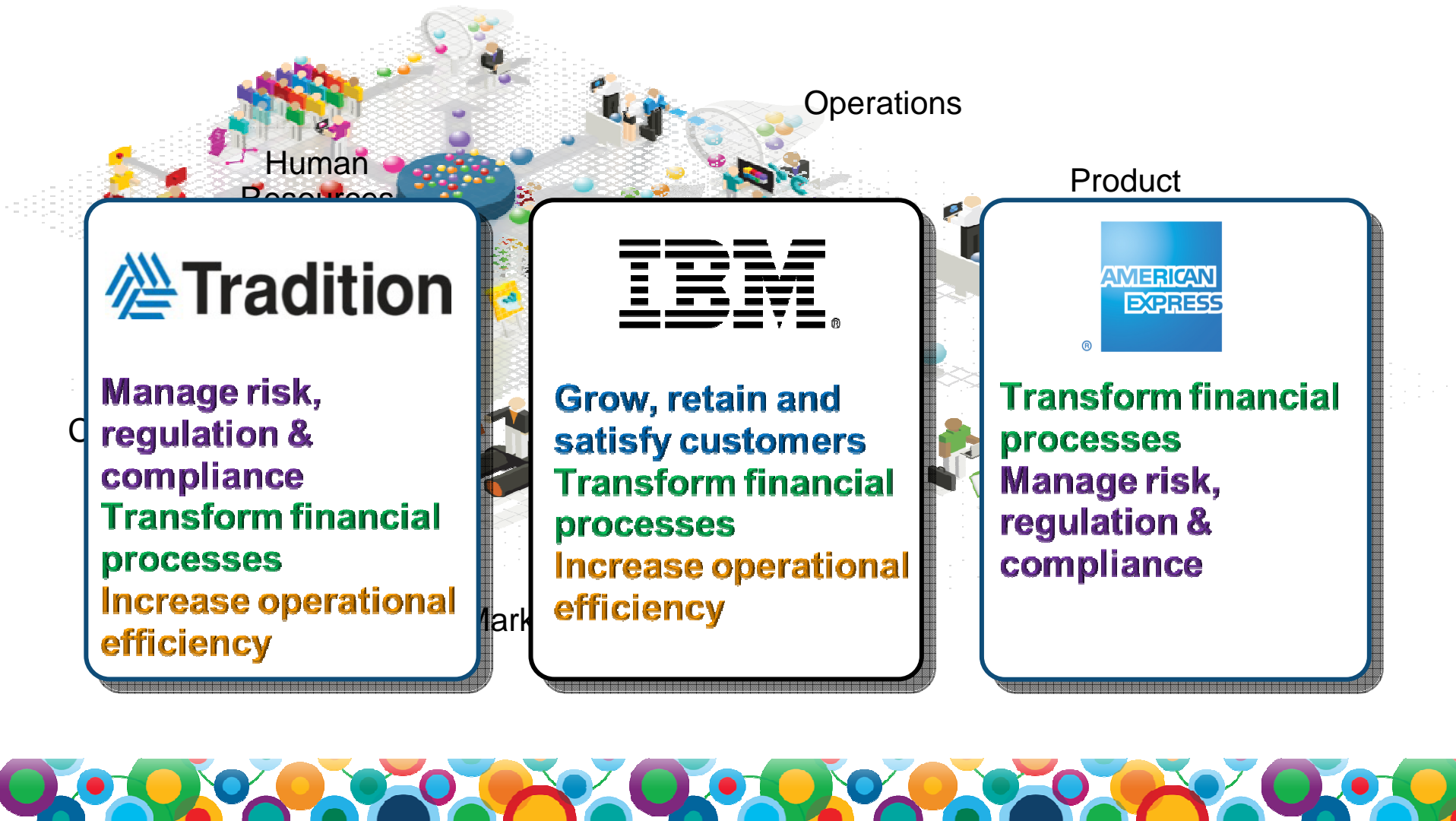
Finance

Transform financial
processes

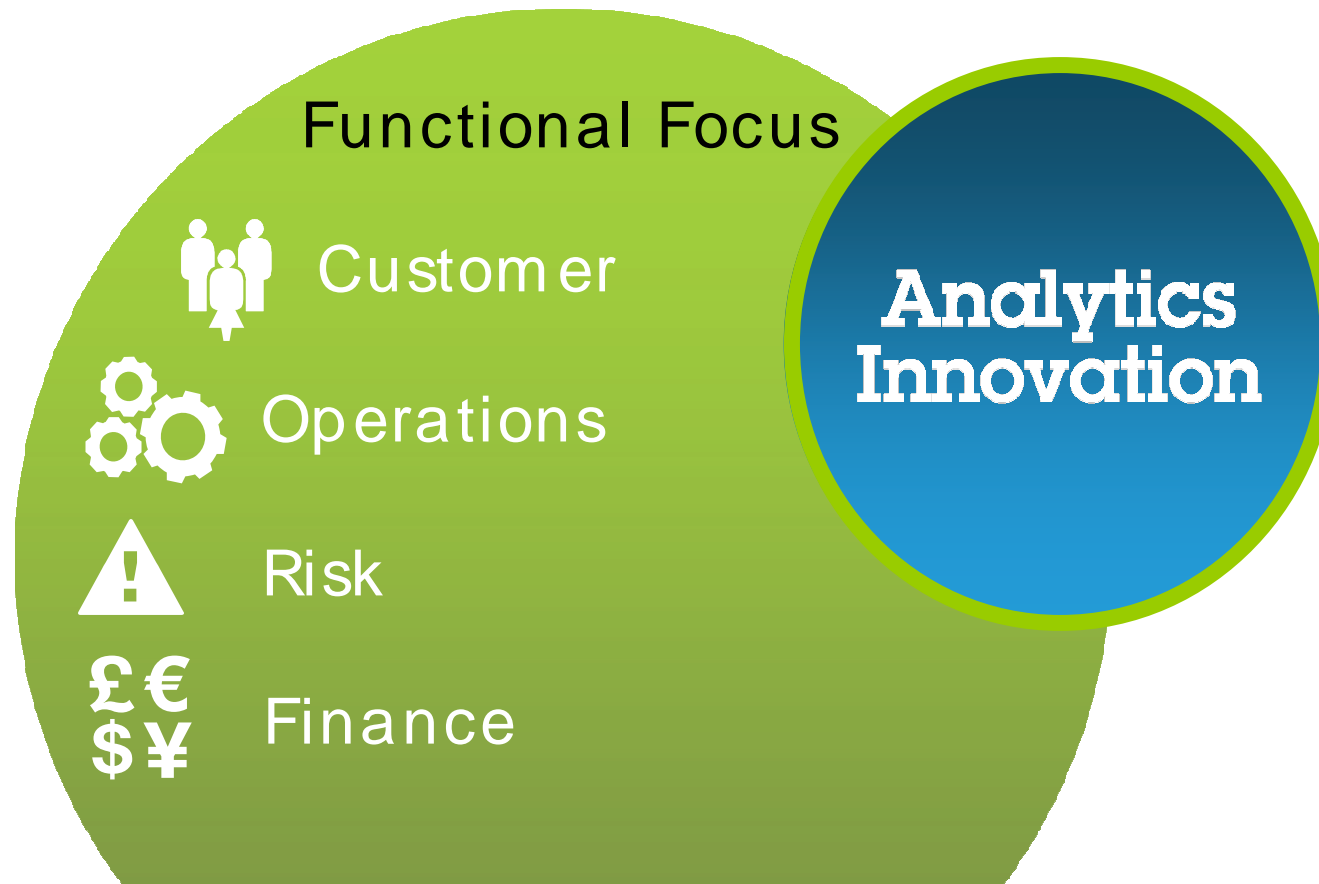
Grow, retain and
satisfy customers



Leaders in Action BA Live 2012



Weaving analytics into the fabric of business





Financial Analytics



IBM solutions help organizations transform financial processes and drive performance





Transforming Finance with Performance Management



Smarter Analytics Signature Solution:
CFO Performance Insight

Cognos Disclosure
Management



Cognos TM1
& Cognos Express





CFO performance Insight

An IBM Smarter Analytics Signature Solution



Measure, monitor, and anticipate business performance with pre-configured solution that

- Uncovers temporal-causal relationships between performance metrics using predictive analytics
- Enables guided root-cause analysis and what-if analytics through executive style dashboard

CFO performance insight

Business outcomes

- University reduces financial modeling process by 25 percent
- Finance company improves reporting efficiency by 70 percent



Cross-Industry





Issue Identification

IBM Smarter Analytics Signature Solution

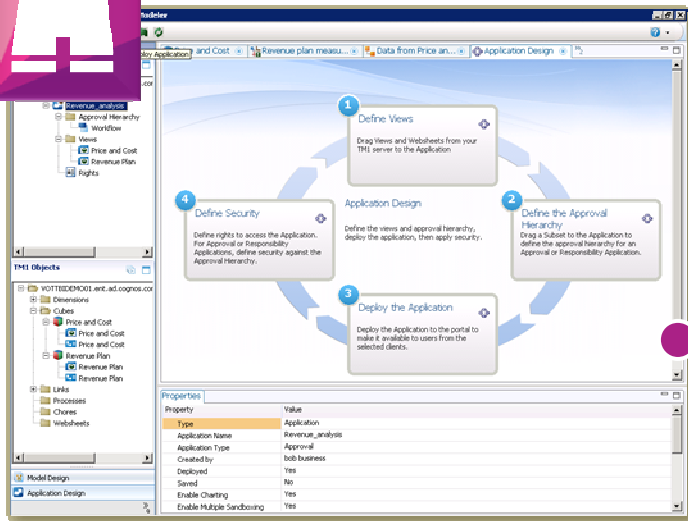
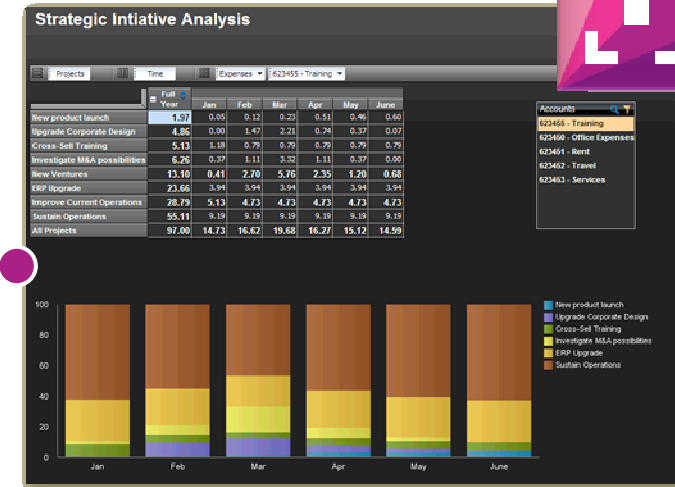


Analysis & what-if, Forecast preparation, & Execution

IBM Cognos TM1 & Cognos Express

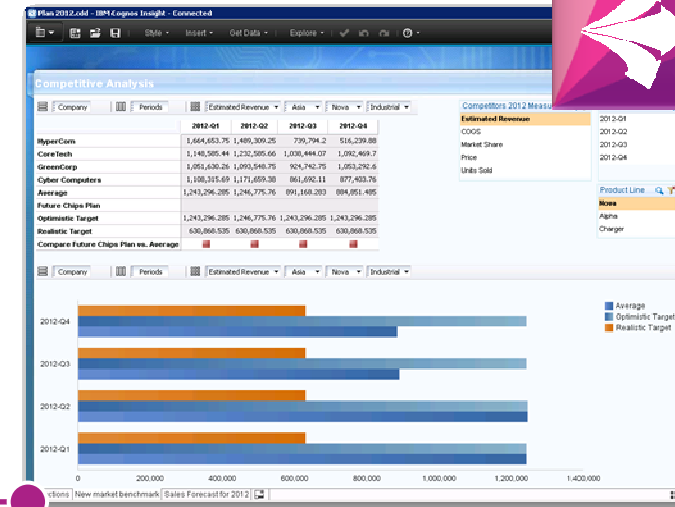


- Access to external and corporate-sanctioned data sources
- Boundless freedom to perform analysis
- “Write-back” for what-if scenarios and planning template development



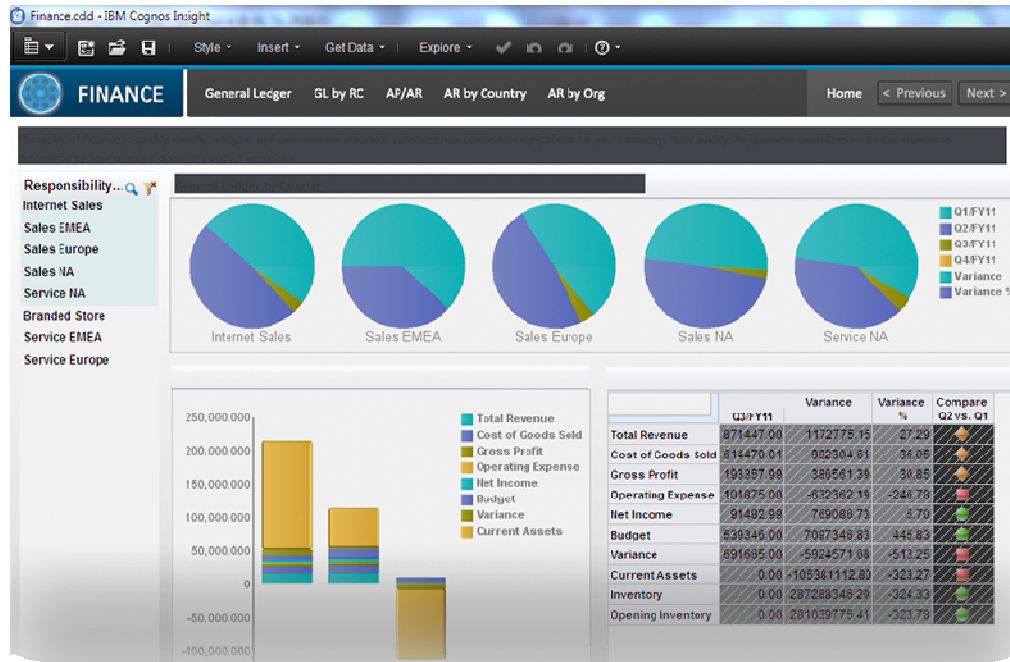
- Multidimensional modeling tools
- Big time savings, less risk and better visibility
- Visual interface for intuitive modeling

- Driver-based models
- Easier scenarios to address risk
- Easy distribution and aggregation of templates
- Real-time reporting



Planning, Analysis & Profitability Modeling

Performance Blueprints



- Functional and Industry Blueprints
- Samples available in Cognos Insight

ANALYTICSZONE



Narrative Business Reviews

Introducing IBM Cognos Disclosure Management



Analytical
insight



Performance
narrative



Gain consensus,
plan & execute



On going reports
& analysis

Speed alignment and decision-making



Financial &
performance data



MD&A
disclosures



Review, edit,
Approve, certify



Publish to shareholders,
regulators, etc.

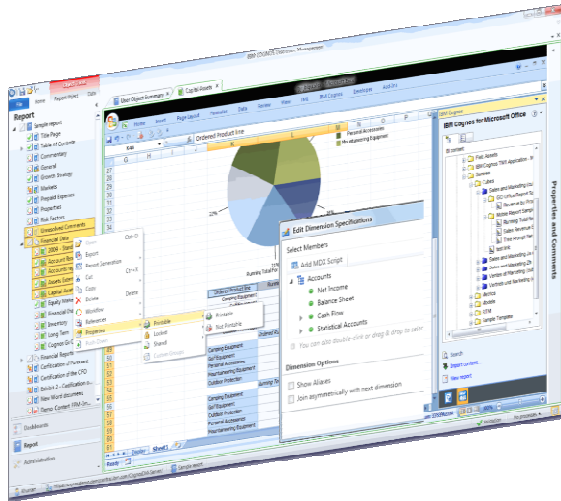
Reduce risk of error, insider leaks, and late filings



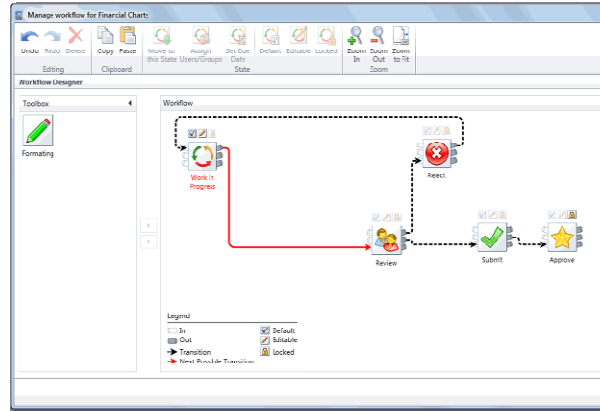


Narrative Business Reviews

Introducing IBM Cognos Disclosure Management



Load and leverage spreadsheets



Connect easily to all data

Design intelligent process and automation



Integrate numbers with narratives





Operational Analytics



IBM Operational Analytics solutions are driving the next wave of **efficiency** and growth

Threat & Fraud Detection



Asset Management



Supply Chain Optimization



Sales Performance Management





What's new in Operational Analytics





Customer Analytics



In this era of the empowered consumer, organizations are focused on optimizing the **Customer Experience**

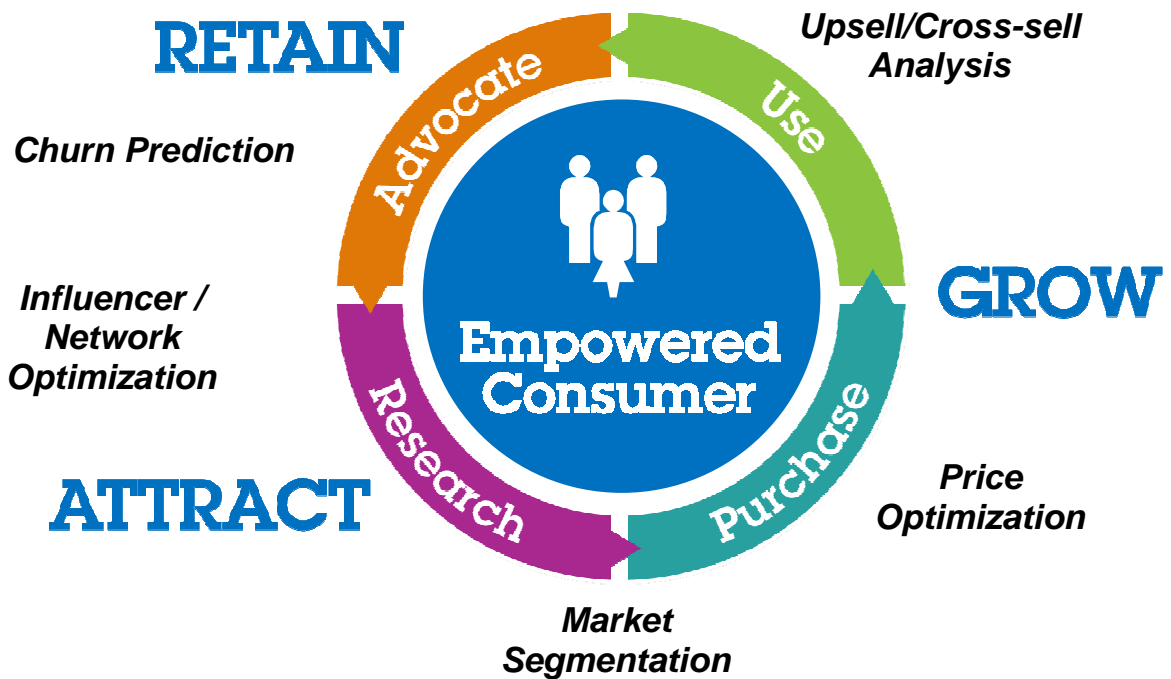




Customer Analytics



IBM Customer Analytics
solutions provide actionable insights to attract grow and retain customers



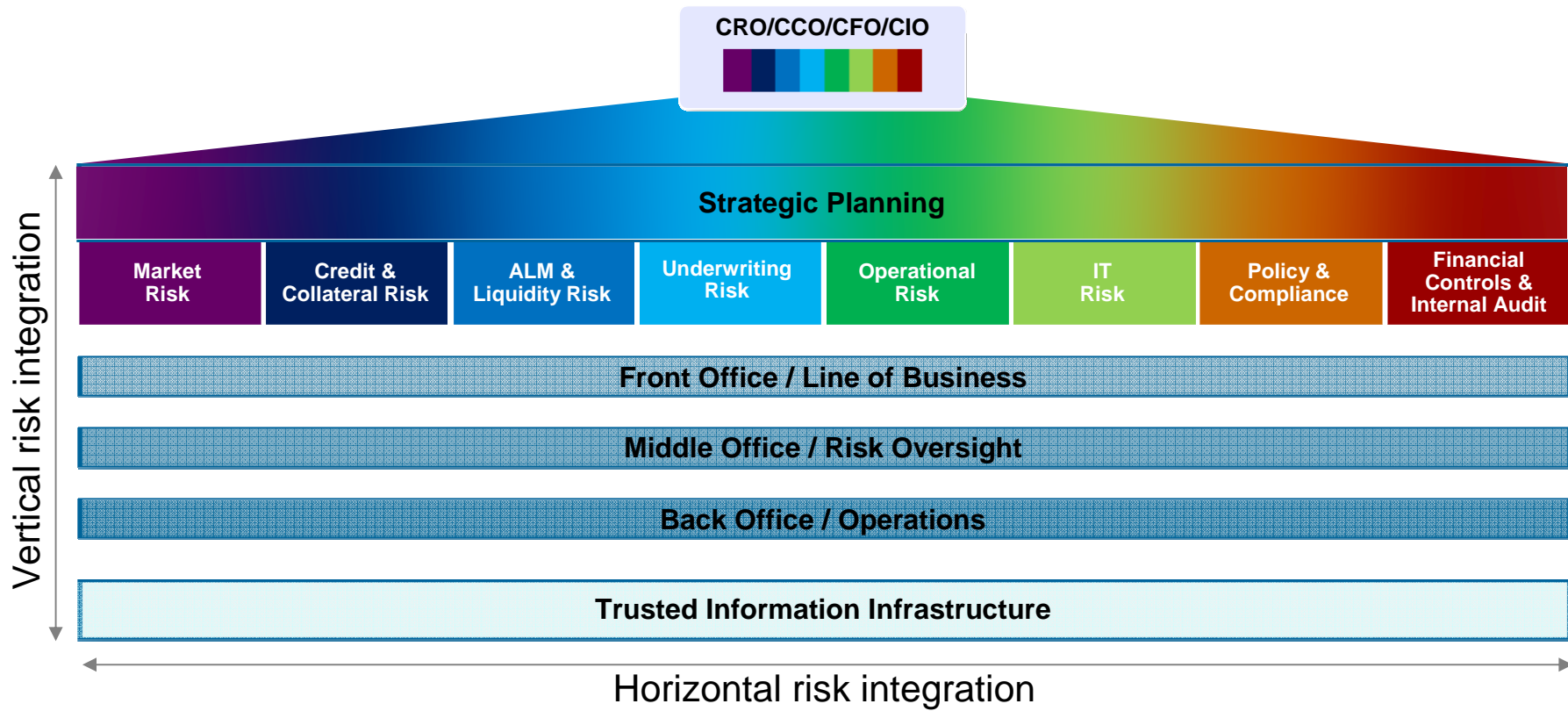


Risk Analytics



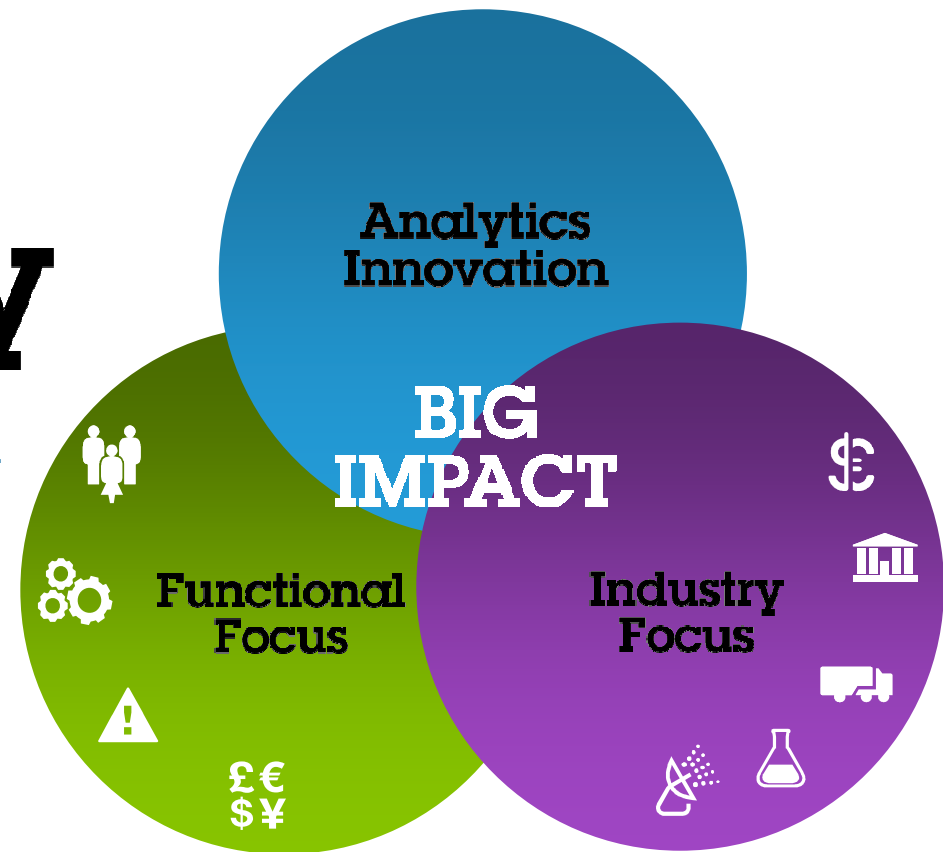


Risk Analytics





Addressing
business
and **industry**
imperatives
to drive **impact**





Why IBM Smarter Analytics is Unparalleled



Broad and integrated portfolio of information and analytics capabilities for finance and risk professionals

Enterprise-class performance management

Integrated risk management

Comprehensive business analytics



Proven experience accelerating time-to-value and delivering breakaway results

20,000+ analytics-driven client engagements

9,000+ consultants
27,000+ partners

Analytic Solutions Centers
Smarter Analytics Signature Solutions



Advanced technology and expertise applying innovation to real world problems

IBM Watson

World's largest math department in private industry

500+ analytics patents per year



Take advantage



**Customer
Advisory Boards**

3:30 pm

**Networking
Reception**

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Expo peds

visit
AnalyticsZone.com



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