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IBM Planning Analytics

Speed, agility and foresight for the cognitive era – Powered by IBM TM1

Highlights

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

- Links operational tactics to financial plans

- Facilitates flexible profitability analysis and what-if scenario modeling

- Lets users create compelling visualizations in a self-service Workspace

- Integrates with the familiar Microsoft Excel interface to speed adoption

- Supports on-cloud or on-premises deployment

Overview

Volatility, uncertainty and risk have been with us for years – and they're not going away any time soon. But most planning teams, whether in Finance, Operations, HR, Sales or elsewhere in the organization, still spend an inordinate amount of time on manual, spreadsheet-based processes – collecting, consolidating and validating data before they can even begin to analyze it.

In response, leading organizations are seeking faster, more flexible solutions to deliver deeper insights into both financial and operational performance. Too often, however, they believe they have to choose between the ease of use and fast deployment of a cloud solution or the powerful analytics capabilities traditionally available only in on-premises solutions. But now they don't have to choose. Now they can have it all with IBM Planning Analytics. One solution – two deployment options.

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

IBM Planning Analytics is a fast, flexible and complete planning and analytics solution. It can be deployed on the cloud or on-premises and it helps organizations large and small drive greater process efficiency and deliver the foresight they need to steer business performance effectively. It has been praised for its ease of use by customers and analysts alike. It not only automates manual tasks, but goes beyond automation to help you uncover new insights directly from your data. IBM Planning Analytics helps bring organizations into the cognitive era by enabling users to forecast outcomes based on evolving trends and perform in-depth, what-if scenario analysis to test alternative assumptions. It lets users create timely, reliable plans that put insight into action, and communicate with compelling visualizations. IBM Planning Analytics speeds decision making *and* improves decision quality.

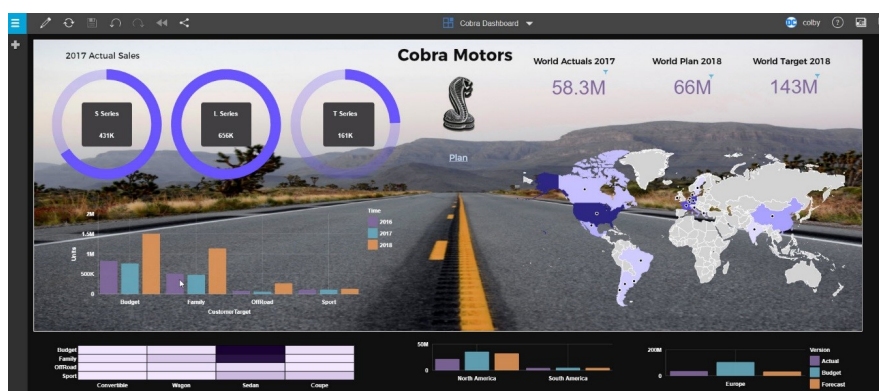IBM Planning Analytics gives you:

- **Speed**—Start quickly and grow your deployment as needed, automating plans, analyses and reports to drive greater efficiency.

- **Agility**—Adapt plans, budgets and forecasts to changing business conditions as you align financial plans with corporate objectives, linked to operational tactics and market events.

- **Foresight**—Explore and visualize insights from both internal and external data, including enterprise resource planning (ERP) and customer relationship management (CRM) systems, to understand what's driving your business, and incorporate those insights into plans that anticipate the future.

With a customizable planning and analytics Workspace, 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 user interface that can be deployed to Finance, operational and departmental users across the organization. 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 model scenarios, then immediately see the impact of alternative courses of action on a range of business drivers.

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 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 quickly, to whoever needs them.

Multidimensional analysis

Built on the powerful in-memory IBM TM1 calculation 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, supply chain options, sales mix, and price/volume variance.

Complex hierarchies and dimensions can be handled easily to gain new insights into business performance – or business problems. The solution's ability to support enterprise-scale data volumes (thanks to its ability to manage data sparsity in multidimensional planning cubes) reduces the need to move or replicate data, and helps analysts deliver a "single version of the truth" to management.

The "hierarchies" capability in IBM Planning Analytics provides both technical advantages and business-user benefits. With hierarchies, you're not limited to the traditional definition of cubes. You can perform in depth, granular analysis using "attributes" to describe the characteristics of products, customers, regions, and more. Attribute data can be leveraged in the form of "virtual

dimensions" using data that existed at the time the cube was created or introduced later on.

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 sandboxing and modeling capabilities in IBM Planning Analytics enable everyday finance and business analysts to create and maintain sophisticated plans and forecasts with little to no IT support. Built on the mature, multidimensional technology of IBM TM1, IBM Planning Analytics enables 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. Users can define operational drivers and link them to financial and operational outcomes throughout the planning process to see how a change in one variable ripples through the organization. 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 verifying data and maintaining spreadsheets.

Visualizations, scorecards and dashboards

The IBM Planning Analytics Workspace features a highly visual, freeform design that offers more than 25 different graphics, including charts, maps, images and shapes, plus text and video. These automated visualizations help you create vivid, impactful reports to share insights with decision makers. Quick searching and Snap Commands give the interface a natural-language-like feel.

You can develop 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 drives strategy management and execution by helping align initiatives, resources and actions with corporate objectives.
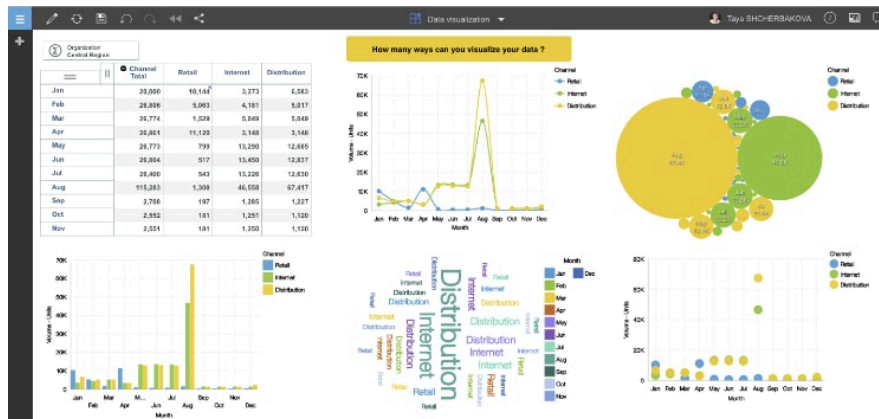
IBM Planning Analytics for Excel

Spreadsheets are among the most popular software tools ever invented. But they do have 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.

The IBM Planning Analytics for Excel interface retains full Excel functionality and formatting, including capabilities such as graphing and built-in functions. Finance and business professionals can work in the familiar Excel interface while enjoying all the capabilities of a modern planning and analytics solution.
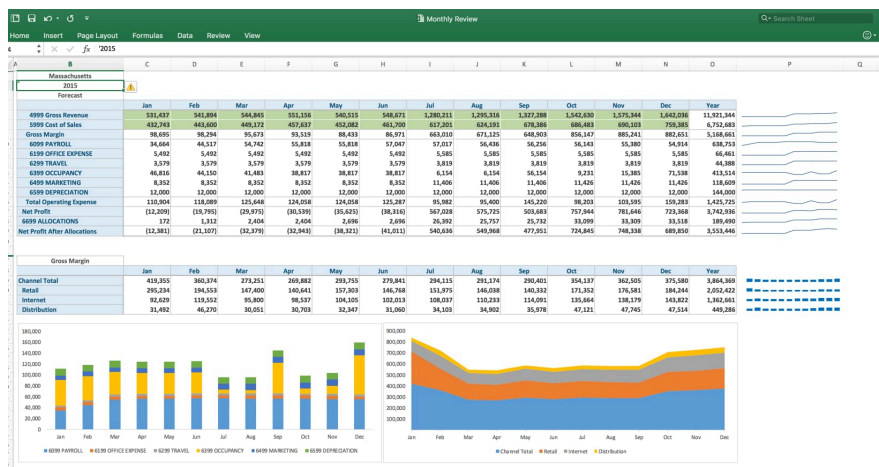
IBM Planning Analytics benefits

- Enables finance, operational and departmental business users to create timely, reliable plans, budgets and forecasts in a customizable analytics Workspace.

- Allows users to analyze data from multidimensional planning models in the familiar Microsoft Excel interface.

- Supports fast, flexible, what-if scenario modeling.

- Manages enterprise-scale data volumes in multidimensional planning cubes.

- Leverages internal and external data, including data from enterprise resource planning (ERP) and customer relationship management (CRM) systems.

- Performs complex cost allocations and profitability analysis, letting users drill down for a granular view of profitability.by product, customer, region, sales channel and more.

- Facilitates best practices such as driver-based planning and rolling forecasts.

- Creates compelling visualizations automatically, with more than 25 different charts, tables, maps, images and shapes – plus text and video – to choose from.

- Incorporates scorecards and dashboards to monitor key performance indicators (KPIs).

- Provides a unified Web, Excel, and mobile experience for all user roles.

- Supports natural language searching and multidimensional 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.

- Facilitates on cloud or on-premises deployment.

Conclusion

In today's constantly changing, frequently disrupted business environment, IBM Planning Analytics provides the speed, agility and foresight your organization needs to compete successfully. Starting from a dynamic, customizable planning and analytics Workspace, this solution enables Finance, operational and departmental 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. 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 – helping organizations large and small become more agile and able to meet whatever the future brings.

Why IBM?

IBM Analytics softare 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/business-analytics

For more information

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