



IBM Consulting

G-Cloud 15 IBM - Digital Finance Technology Strategy

Service Definition Document

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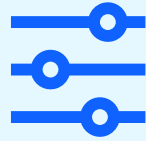
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IBM's Finance Technology Strategy helps organisations modernise their finance landscape by aligning technology, data, automation, and next-generation capabilities (including AI/GenAI) to improve efficiency, decision-making, risk control, and overall business performance.

Features



- Finance technology strategy and roadmap, aligned to overall organisational strategy
- Current-state finance technology maturity and Cloud readiness assessment
- Future-state architecture design and implementation roadmap planning
- Vendor selection across technology components - ERP, EPM, Automation
- Finance data and reporting strategy and technology architecture
- Finance automation approach to delivering ongoing incremental value for the processes
- Next-generation technology and functional support model design including AI/Gen AI
- Future Finance technology skills development framework
- Risk & Controls automation
- Deep skills across leading technologies - SAP, Oracle, Workday, Microsoft

Benefits

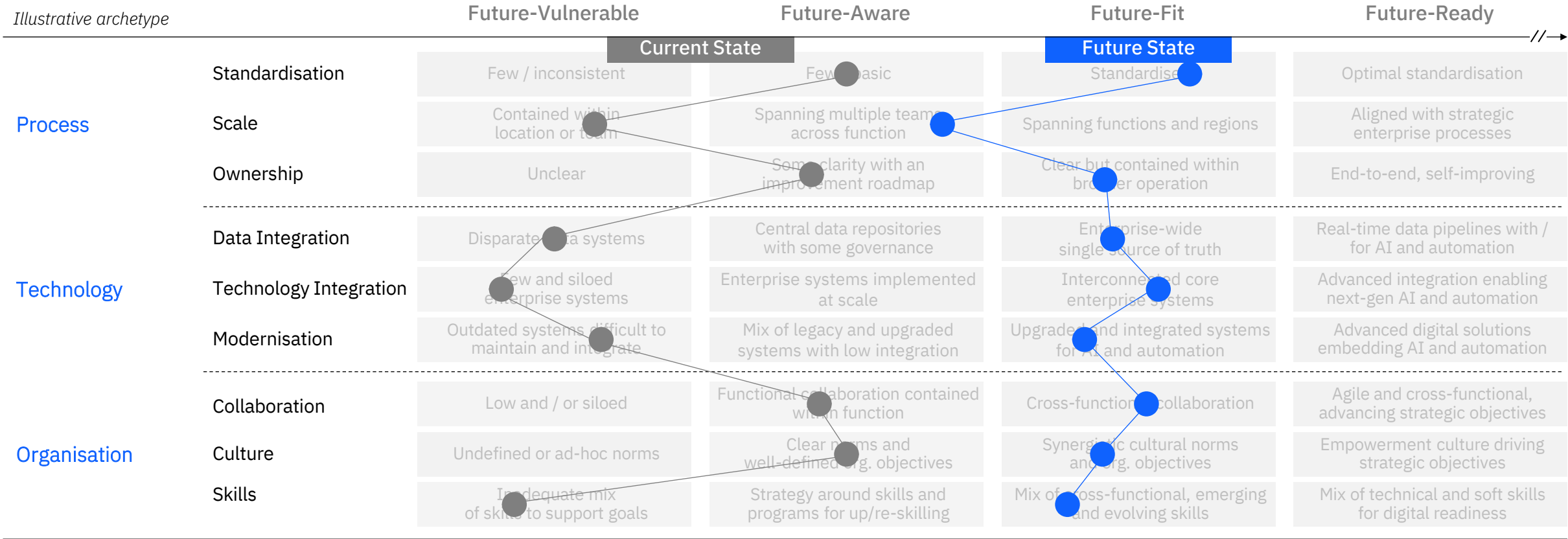


- Optimised productivity and efficiency, reduced cost and improved data quality
- Finance function better enabled to support overarching organisational objectives & optimised organisational structure
- Faster and better decision-making resulting from improved data
- Greater employee and customer satisfaction owing to streamlined processes
- Reduction in risk & controls issues, automated error detection
- Cloud and next-generation support model delivers 'evergreen' technology landscape
- Greater commercial value from strategic finance technology providers
- Enhanced digital skillsets in finance organisation with better understanding of AI/Gen AI

The Art of the Possible



Organisations starting their technology journey must establish a strong foundation with an effective operating model that accelerates the adoption and value of technology



- Critical capabilities to develop:
- Target operating model
 - End-to-end process optimisation
 - Optimised investments for automation



Building on a strong foundation, organisations can elevate their operations through agile centers of excellence and advanced technologies at scale

Illustrative archetype		Future-Vulnerable		Future-Aware		Future-Fit		Future-Ready		//→
				Current State		Future State				
Process	Standardisation	Few / inconsistent		Few / basic		Standardised		Optimal standardisation		
	Scale	Contained within location or team		Spanning multiple teams across function		Spanning functions and regions		Aligned with strategic enterprise processes		
	Ownership	Unclear		Some clarity with an improvement roadmap		Clear but contained within broader operation		End-to-end, self-improving		
Technology	Data Integration	Disparate data systems		Central data repositories with some governance		Enterprise-wide single source of truth		Real-time data pipelines with / for AI and automation		
	Technology Integration	Few and siloed enterprise systems		Enterprise systems implemented at scale		Interconnected core enterprise systems		Advanced integration enabling next-gen AI and automation		
	Modernisation	Outdated systems difficult to maintain and integrate		Mix of legacy and upgraded systems with low integration		Upgraded and integrated systems for AI and automation		Advanced digital solutions embedding AI and automation		
Organisation	Collaboration	Low and / or siloed		Functional collaboration contained within function		Cross-functional collaboration		Agile and cross-functional, advancing strategic objectives		
	Culture	Undefined or ad-hoc norms		Clear norms and well-defined org. objectives		Synergistic cultural norms and org. objectives		Empowerment culture driving strategic objectives		
	Skills	Inadequate mix of skills to support goals		Strategy around skills and programs for up/re-skilling		Mix of cross-functional, emerging and evolving skills		Mix of technical and soft skills for digital readiness		

- Critical capabilities to develop:
- Center of Excellence
 - Digitally assisted workflows
 - Agile workforce



Effective use of AI and adjacent technologies act as catalysts for future-readiness, all while empowering the organisation with a seamless digital experience

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- Critical capabilities to develop:
- Autonomous Agents / Agentic AI
 - Predictive Insights
 - Integrated real-time service

Service Definition

IBM delivers a Digital Finance Technology Strategy offering that helps organisations design and implement a modern, integrated technology ecosystem for Finance.

We combine deep Finance Transformation expertise with industry-leading capability across ERP, EPM, analytics, data management, integration, intelligent automation, and advanced technologies including AI and Generative AI. Our approach aligns Finance vision, data strategy, and technology architecture to enable intelligent, scalable and insight-driven Finance operations.

Working collaboratively with clients, we apply our industry, finance and technical expertise to shape and deliver best-in-class technology strategies that enhance performance, improve efficiency, and support a wide range of business needs.

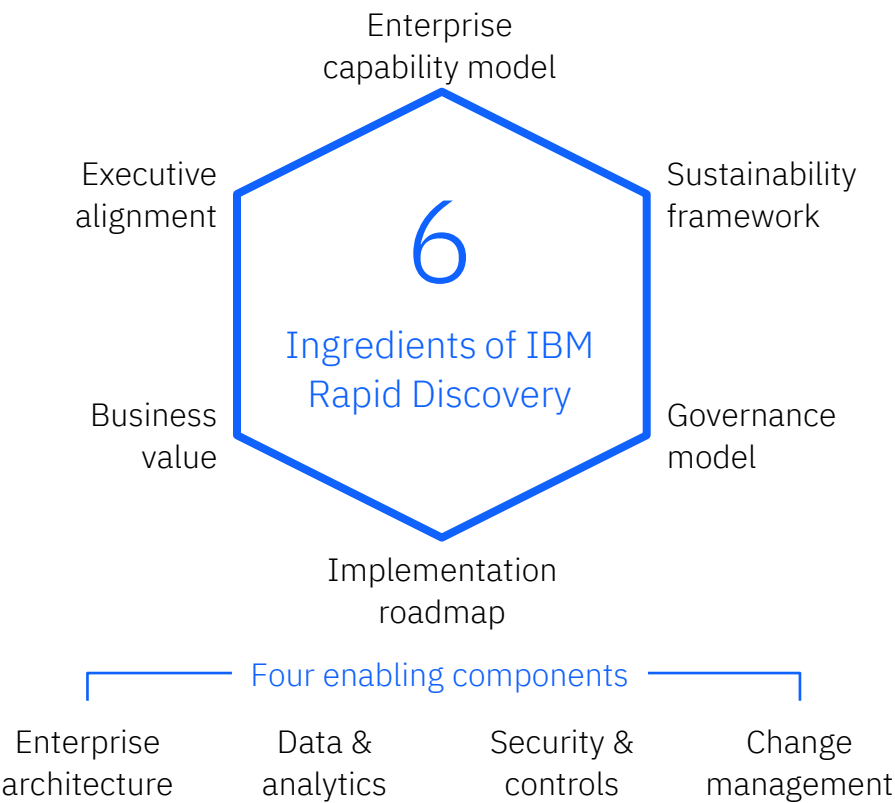


Our Approach



IBM's Rapid Discovery provides a structured, fact-based approach to define success and build a strategic, ERP-enabled transformation plan grounded in business value, governance, sustainability, and enabling technologies

Build the fact base to confidently move forward with critical ERP enabled transformation decisions.



Define competitive differentiation



Establish end-to-end business scope



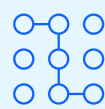
Design a resilient, scalable, AI-enabled foundation



Bring the value case to life



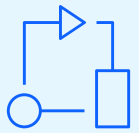
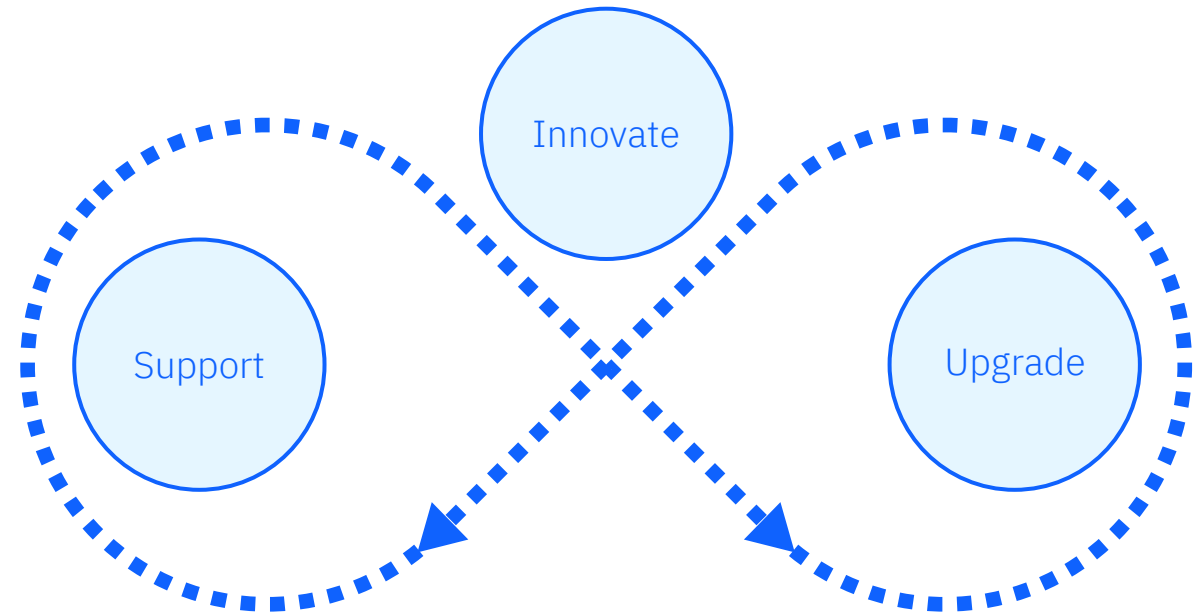
Develop a governance structure



Align on the strategic path forward

Helping organisations continuously evolve after core transformation by providing ongoing support, upgrades, and innovation

Once your core transformation is complete, you must continuously review your business needs, map opportunity to value, and understand which new features and technologies will differentiate you in the market.



Transformation
office



Regular
upgrades



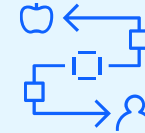
Prioritised
backlog



Proactive
innovation



New product
development



Supply chain
efficiencies



Process
evolution

We bring the full spectrum of talent, methods, partners, technology, and change expertise needed to successfully deliver large-scale transformation outcomes.



Talent @ Scale

- Experienced delivery leaders
- Global scale
- Technical certification



Relevant Assets & Methods to Execute

- Assistants to execute
- Industry best practice solutions
- Transformative domain enhancements
- Program methodology & accelerators



Business First Change Management Approach

- Integrated change management methodology
- Adoption based approach
- Assets & accelerators to drive change



Ecosystem of Leading Partners

- Extensive Partner relationship
- Delivery partners
- Technology partners



Superior Technical and Data Design

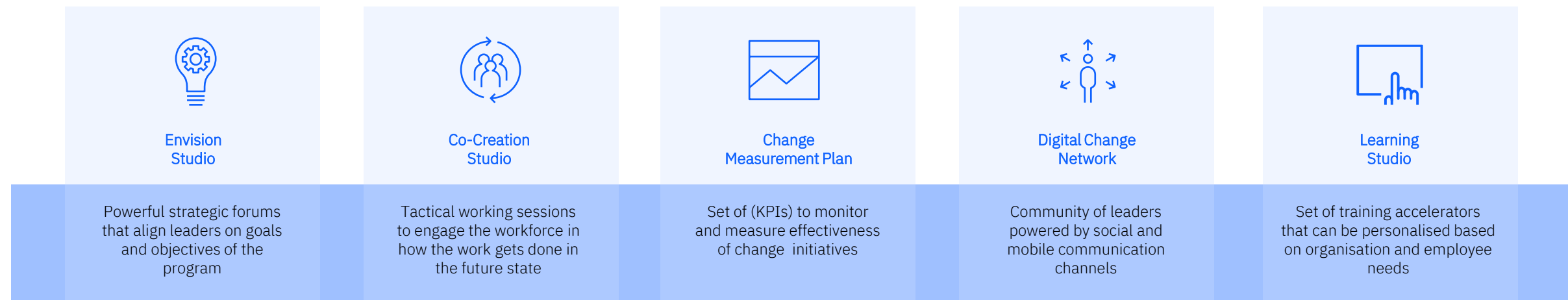
- Clean Core 2.0
- Data enablement
- Optimised technology solution



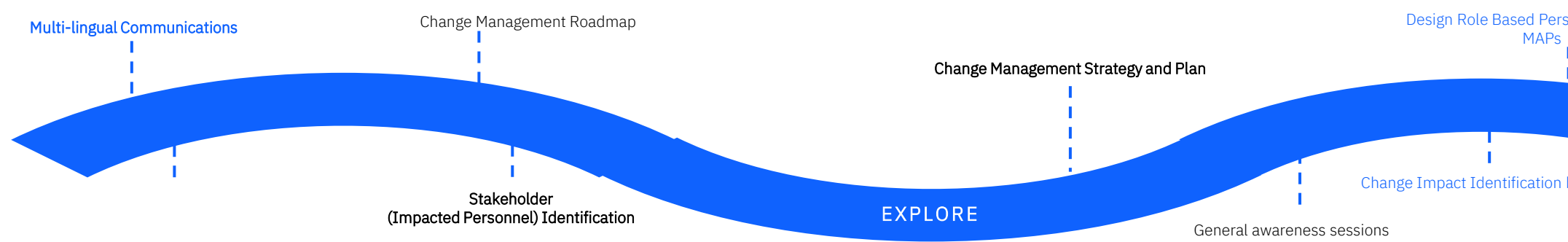
Holistic Technology Stack

- Security
- Integrated infrastructure
- GenAI enabling software

And a business value first approach to change management to achieve outcomes



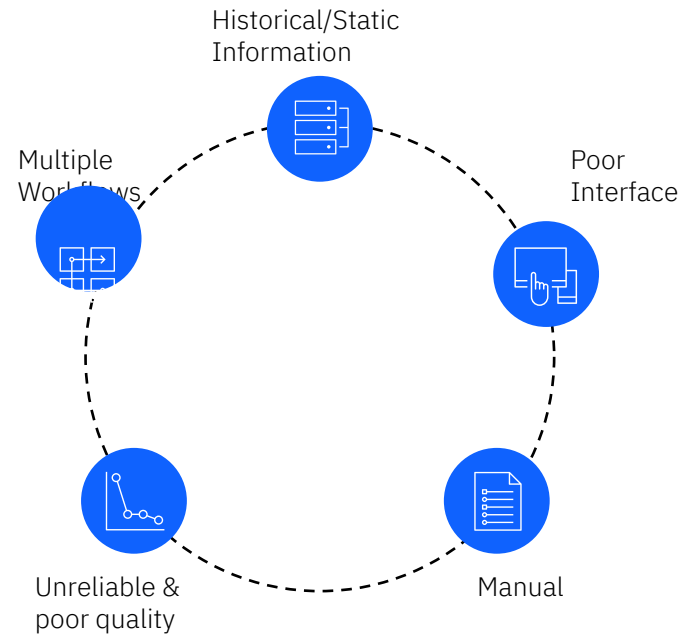
SOLUTION ADOPTION AND ENABLING B



With a Data and analytics strategy for deeper insights and faster decision making

Unlock value and create capacity by improving business operational efficiency with the convergence of the Transactional & Analytical Worlds

Today (Fragmented & Siloed)



Current Data Lake: Close the gap between available data and information and how that is turned into knowledge and insights to create more compelling user experiences.

Our Enablers

AI Fabric

AI driven Innovation
Automated Workflows
User centric



Data Mesh

Integrated with Business Platform
Ecosystem of reusable and trusted data assets



Uniform Information Layer

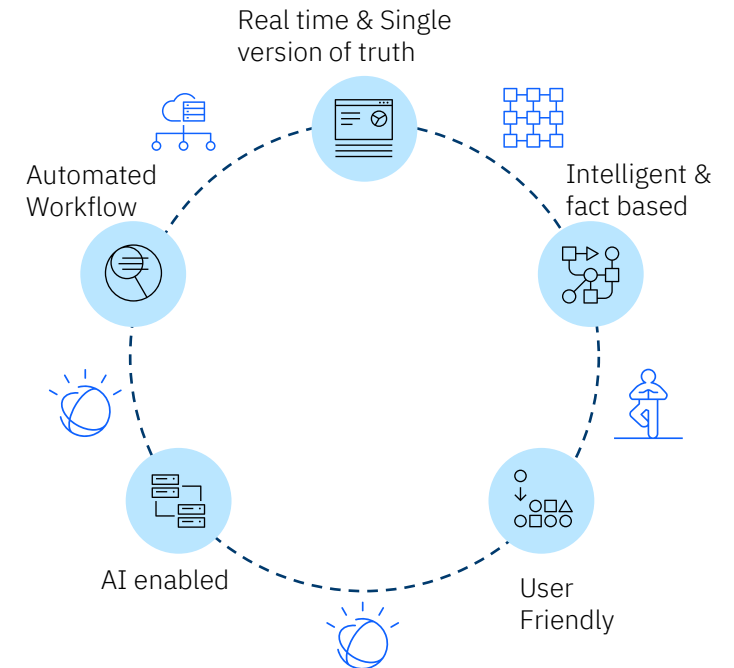
Fact Based
Predictive & prescriptive data usage
Real time



Federated Data Governance

The Data Mesh Architecture: Connect data components to underlying sources in the suite of applications to create a uniform information layer. Automation applied to the data fabric delivers instantaneous insights for analytics using a very strong fact base replacing subjectivity and individual interpretation.

Interconnected and Intelligent Future



Integrated Data & Technology: Drive Business value through real-time insights, unleash and unlock the wealth of data and insights by delivering it to users/buyers in the fastest way possible, empower by AI-driven automated workflows.

Our ERP Technology and Our Strategic Partners



Strategic Partner - SAP



Deep, long-standing partnership with SAP

+53 Year Partnership

Leader in total SAP certifications

SAP Partnership status

- Global Service Partner
- Global Technology Partner
- Global Outsourcing Operations Partner
- Global Cloud Infrastructure Partner
- Global RISE with SAP Premium Supplier
- Global Value-Added Reseller



SAP Certified
in Application Management Services

40 Pinnacle Awards, including:

- 2025: Sales Success - Large Enterprise
- 2024: Industry Cloud Innovation
- 2024: Business AI Customer Value

40 Client Innovation Centers

Largest base of SAP Global Solution Delivery Centers

Value Generation Partnership Initiative

Focused on addressing these market trends and demonstrates our commitment to support clients in their efforts to successfully infuse AI and automation into every step of their value chain.



Ecosystem Expansion

- Increase the SAP-experienced consulting workforce and to develop the next generation of talent.
- collaborate on social impact programs to create job programs for at risk populations
- expand their ecosystem relationships

Business Processes

- Use Signavio to understand current processes and define next generation LOB processes
- Define an AI- prescriptive roadmap of SAP embedded functionality and IBM-SAP co-innovation solutions.
- Work with our clients to activate SAP Joule capabilities to support their transformation journeys.

Industry Innovation

- Co-innovate and deliver next generation industry processes
- Develop an AI prescriptive roadmap of high value add industry areas and proposed solution approach.

Architecture & Approach

- Provide a prescriptive approach to clean core
- Infuse Gen AI into project delivery & AMS
- Leverage IBM Consulting Advantage Platform

Our SAP Partnership and Industry Capabilities bring the right expertise to support our clients

7,500+

successful SAP programs

- SAP S/4HANA
- RISE with SAP (Private Cloud ERP)
- GROW (Public Cloud ERP)



815+

SAP S/4HANA Go-Lives to date

105+

S/4HANA Projects in Progress

200+

SAP RISE Projects YTD

750+

S/4HANA Assessments completed

53-year partnership

SAP Platinum Partner



40 SAP Pinnacle Awards

2025 recipient in category:

- Sales Success - Large Enterprise

2024 recipient in two categories:

- Industry Cloud
- Business AI | Customer Value Creation

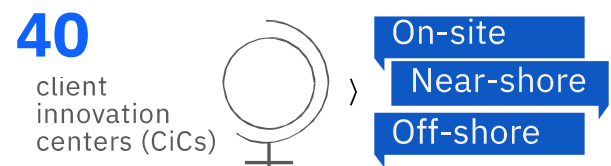


Recent SAP Regional & Global Partner Excellence Awards

- EMEA:** SAP Partner Excellence Award 2025 - High Growth Contribution
- GCG:** SAP Greater China Award for Partner Excellence 2025 - Best Cloud Partner – Taiwan
- UKI:** Customer Success Award for SAP UKI Finalist – Imperial Brands PLC
- Global:** Finalist - SAP Global HCM Partner Excellence Award for Indirect Sales and Customer Success
- Global:** Finalist - SAP Global Spend Management Partner Excellence Award for Sales Success – Large Enterprise
- Global:** Finalist - SAP Global Spend Management Partner Excellence Award for Delivery Quality

Global Consulting Capabilities

- 38,000+ highly trained IBM consultants across 80+ countries with an average of 10+ years SAP experience
- 25,000+ SAP S/4HANA trained IBM resources, with SAP 20,000 Learning Hub users
- IBM is an SAP certified Global Partner for: Services, Technology, Cloud Infrastructure, Outsourcing Operations, Value-Added Reselling and RISE with SAP, Premium Supplier - No other SAP partner has more Global Partner Program Certifications
- IBM is a leader in total certified SAP consultants, with over 20,000 SAP certified resources



Largest base of SAP Global Solution Delivery Centers

Strategic Partner – Microsoft



Why IBM is the Partner that turns Microsoft's Vision into scalable Enterprise Impact

End-to-end AI transformation, from AI strategy to implementation, leveraging our expertise, assets & tools to effectively de-risk AI and build scalable AI capability for our clients for sustained value



Market Differentiation

IBM brings deep industry, AI, and hybrid cloud expertise as an enterprise technology leader for 40+ years.

Industry Expertise

Proven industry depth across both regulated (financial services, government, healthcare) and unregulated sectors (retail, industrials).

AI & Data Pedigree

Decades of experience in enterprise-grade AI and data with unique & informed perspective on enterprise needs as both a GSI and ISV. #1 ranked AI consulting provider by AI Magazine.



Asset-Led Delivery Model

IBM accelerates transformation with proprietary tools and assets.

ICA & Agentic Catalyst

Pre-built and ready-to-deploy Agentic AI applications powered by IBM Consulting Advantage.

Other Assets

Reusable industry accelerators, reference architectures, and solution blueprints, built for the Microsoft platform.



Architecture Experience

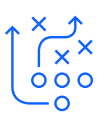
IBM has deep expertise in complex and secure IT architectures.

Complex Enterprise Architecture

Solution-first, enterprise-grade architecture expertise for complex IT environments.

Security & Compliance

Secure by design through zero trust and compliance-aware frameworks.



Collaborative Go to Market

Co-creation with Microsoft infused into IBM Garage methodology.

Strategic Co-Innovation

Co-creation with Microsoft infused into IBM Garage methodology.

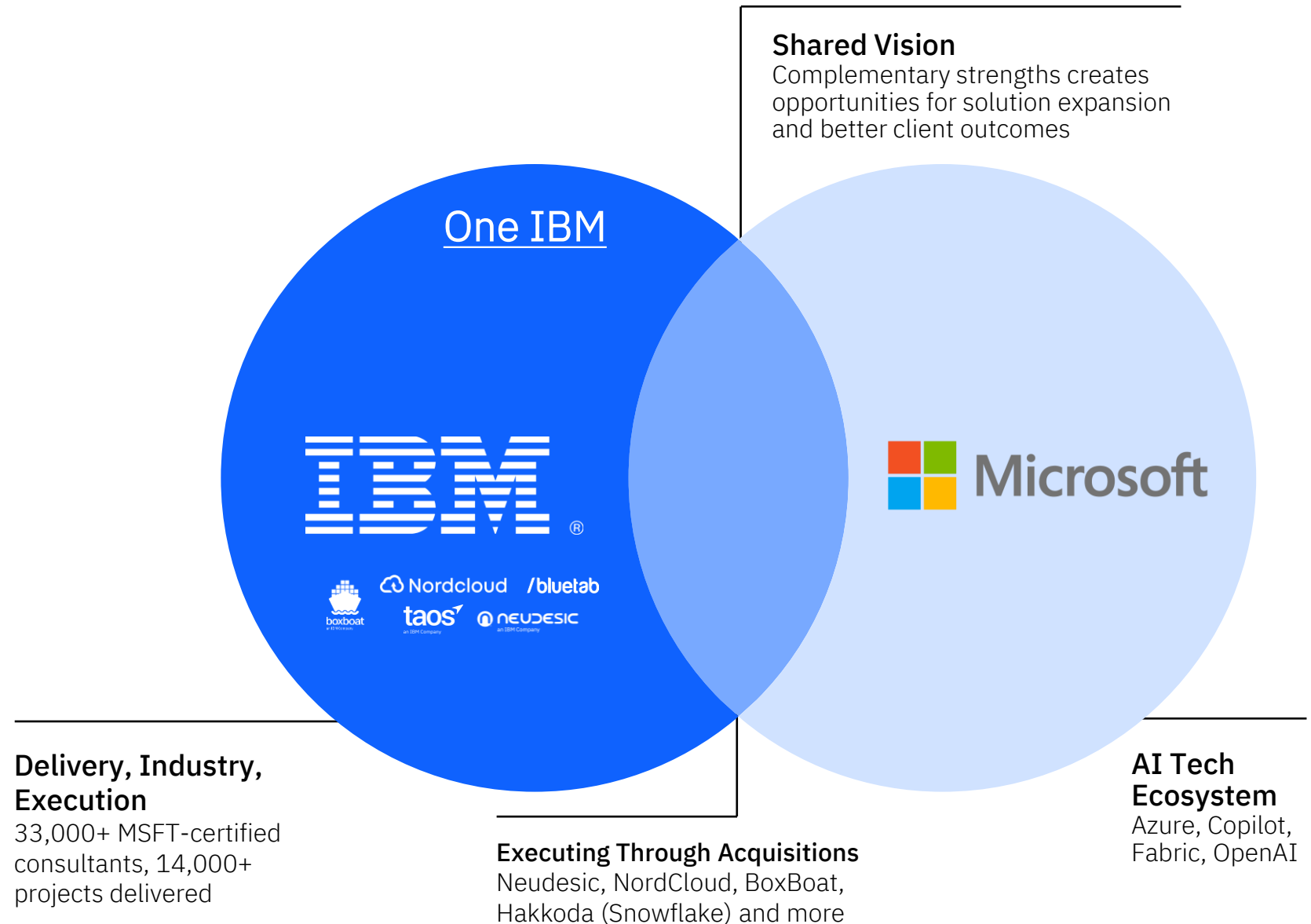
Joint GTM Motions

Microsoft Partner of the Year wins and Azure Expert MSP status.

Bringing together Microsoft's largest technology ecosystem, IBM's deep industry & technical expertise and our shared, long-standing history of solving clients' business problems

IBM brings the enterprise-grade capabilities that map directly to Microsoft's evolving cloud and AI stack — making us the ideal partner to unlock its full value across migration, data, security, and intelligent automation.

IBM & Microsoft are both first movers in the AI revolution, pivoting to AI earlier than competitors.



Strategic Partner – Oracle



IBM has extensive experience and partnership with Oracle

Since 1986, Oracle and IBM have been providing customers with joint solutions, combining Oracle's technology and application software with IBM's complementary hardware, software, and services solutions.

IBM, a Partner member of OPN, has over 10,000 Oracle skilled resources, 10 global delivery centers, 4,000 Oracle certifications, and has won numerous awards and accolades for Oracle. IBM provides end-to-end solutions and services for Oracle customers from assessments through implementations and managed services and emerging technology disruptors.

35+ year
partnership with
Oracle

Oracle Partner

10,000+
dedicated
Oracle
consultants

6,500+
successful
Oracle
engagements

4,000+ Oracle
certifications

2,000+ Oracle
Cloud
certifications

10+ Oracle-
specific delivery
centers

Oracle Cloud
Garage

Leader for
Oracle Cloud
Application
Services by

43+ awards

IBM proven record with Oracle through extensive awards and recognition

40+ Oracle Issued awards across OCI, ERP, HCM, and CX service delivery since 2010

2024 Japan wins Oracle Partner Award for Customer Success at Automotive company	2018-2024 Japan Oracle Cloud Applications Partner of the Year (7 consecutive years)	2023 EMEA Partner of the Year for Innovation of Europe South	2020 Denmark Partner of the Year for ERP/M Cloud	2020 UKI Partner of the Year for ERP/M Cloud	2020 North America Partner of the Year for Oracle HCM Cloud
2020 Global Award for JD Edwards License Revenue Production	2018 Business Rules Excellence Award (BREA) – IBM, Oracle & Rabobank	2018 Japan Cloud ERP Partner of the Year	2018 UK & Ireland Partner of the Year Award in Customer Support Services	2018 Global Award for JD Edwards License Revenue Production	2018 #1 for Oracle ERP Cloud Certified Consultants in Japan from Oracle University Japan
2018 #2 for Oracle HCM Cloud Certified consultants in Japan from Oracle University Japan	2017 Digital Transformation Award for Complementing JD Edwards w/ SaaS Solutions	2017 Oracle Excellence Award Applications Partner of the Year SI GCG	2016 Oracle Excellence Award Applications Partner of the Year SI Japan	2016 Oracle Cloud Rocket Start Award - Japan	2016 Global Award for JD Edwards License Revenue Production
2015 Oracle Excellence Award Applications Partner of the Year SI APAC	2015 Oracle UK: Oracle University Partner of the Year	2015 Oracle Denmark: Oracle Excellence Award Specialised Partner – Applications	2015 Global Award for JD Edwards License Revenue Production	2014 Global Award for JD Edwards License Revenue Production	2013 North America Oracle Excellence Award: Systems Integrator Applications
2013 Japan Oracle Excellence Award: Applications Innovation	2012 Asia Pacific Applications Partner of the Year	2012 UK Consulting Partner of the Year	2011 North America Titan Award for CRM	2011 North America Titan Award for Health & Life Sciences Industry	2011 North America Titan Award for Services Industry
	2010 North America Titan Award for Financial Services Solutions	2010 North America Titan Award for Insurance Industry Solutions	2010 North America Titan Award for Consumer Industry Solutions		

Strategic Partner – Workday



IBM has extensive experience with partnerships with Workday



Workday Leader and #1 Geographical Reach



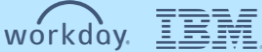
ERP Implementation Leader



Finance & Accounting Outsourcing, HCM IT Services PEAK Matrix



Implementation Challenge



13
Years of Partnership

800+
Certified Workday consultants

60+
Partner Score Rating

30+
Watsonx use cases (10+ demos ready)



8.1K
Workday Certifications

100+
Live Workday Customers active on AMS

Global CICs
In North America, EMEA & APAC

Employee Experience
Design Focus





500+
Client Engagements

Market Leading
Project and Program Management Methods

Industry POVs
& associated offerings

175+
Countries Around the World

IBM Case Studies



AI App in action for a global Pharma: Transformation of Regulatory Reporting for New Drug Applications

Challenge

Labor Intensive, Manual, Prone to Error

Regulatory Submissions face several bottlenecks due to labor-intensive activities relating to Reg module and internal report writing, requiring skilled professionals and extended timeframes.

Inconsistencies And Substandard Quality

This manual, poorly controlled process is prone to report quality conformance and inconsistencies which ultimately delay and even put at risk the timely approval of a new drug applications

Burden on Highly Skilled / Costly Labor

Report authors are highly skilled chemists, engineers and medical practitioners who are crucially needed for other higher value-adding tasks



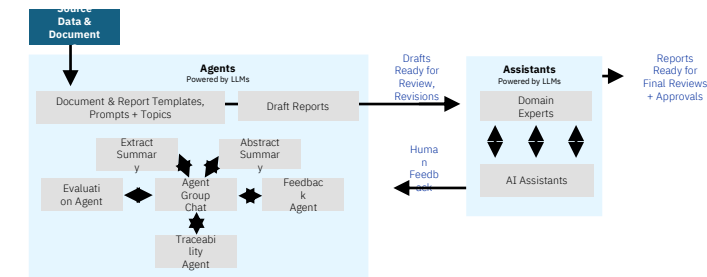
90%

Of content required to submit a Report generated by Agents is made available for final review through an Assistant



2 months vs 6-8 months

Faster Submission Filings and Shorter Times to market through improved rates of approvability



Source2Pay

Infuse AI Agents & intelligent workflows into highly-fragmented sourcing, purchasing and payable functions.

Co-built with Microsoft and now enhanced with Agentic AI to streamline every step of the Source to Pay process such as – Contract creation and analysis, Invoice data extraction, Invoice processing (2-3-4 way matching), Vendor reach out for missing information, audits and more. Supports interaction via M365 Copilot too.

Operational efficiency and cost reduction with AI Agents

- 50%+ operating cost reduction by driving productivity and reducing errors
- 70%+ cycle time improvement by automating & streamlining repetitive tasks

Improved user experience

- End-to-end platform allows 95% touchless transactions
- Enhance collaboration with suppliers through better people-tech work orchestration

Increase governance & compliance

- Overcome system fragmentation for increased transaction and spend visibility
- 95%+ payments on time with strengthened compliance & controls



Why IBM?



With **IBM** you will have a partner that has ...

Proven intelligent workflows, leveraging data and technology, across the finance function

Rapid Celonis process mining approach providing fact-based insights while minimising client business disruption without added licensing costs

Leader in delivering successful ERP programmes across SAP, Workday, Microsoft and Oracle; leveraging a vast talent pool of over 30,000 ERP trained consultants and a repository of over 1,000 developed assets

Teams leveraging an expanding catalogue of assets to deliver success

Pre-built Automated Unit & Integration Test, Fiori Apps - Enhanced Rapid ERP Data Migration with Data Models and Standards

270,000+ experienced consultants with deep, relevant industry knowledge for customised value differentiated solutions

A human centric approach and collaborative mindset, with IBM tools, methodology and frameworks targeted to discover and deliver value continuously

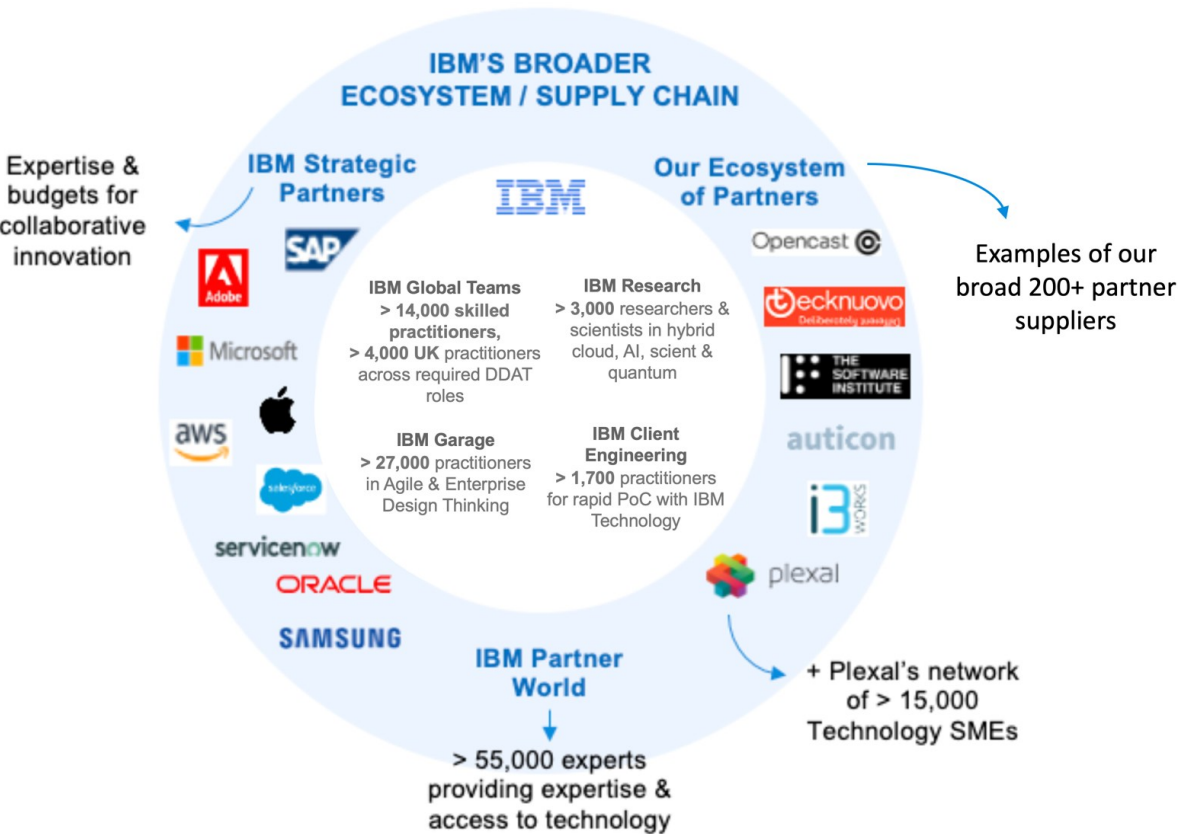
Experience in UK Government industry, aligning c-suites behind an integrated vision

Internal transformation expertise having transformed IBM over decades and learned lessons to share with clients

Partnerships with leading cloud, business application and accounting firms to rapidly establish an ecosystem for you to draw upon and apply AI/Gen AI

IBM drives collaborative transformation by co-creating solutions with leading partners alongside IBM assets and accelerators to deliver best-in-class outcomes

IBM's Partner Ecosystem



IBM's **Institute for Business Value (IBV)** provides thought leadership and insights on emerging business trends and technologies to help organisations decision making and drive innovation. We use all the thought leadership and tools from IBV to accelerate programmes and identify opportunities to move towards best-in-class.

C-Suite

Offers strategic insight, direction, planning analysis and advice to CxOs and leadership teams.

For our latest CFO report '6 power moves CFO's must make: Find out more [HERE](https://ibm.co/c-suite-study-cfo) (<https://ibm.co/c-suite-study-cfo>)

Benchmarking

Benchmark Wizard is IBM's open standards patented benchmarking tool to target leading practice

The tool contains 42,000+ organisations across 60 countries, from all major industries, front and back-office functions (including the 8 finance process groups) and technologies such as cloud, AI, GenAI and automation

Component Business Modeling

CBM is a patented framework for modeling and analysing a business or processes for the purpose of organising and grouping business activities into basic building blocks of a business called components.

These components are marked with opportunities for automation, AI and GenAI which will inform Leonardo on your process optimisation.

"IBM IBV has been ranked #1 in thought leadership quality by Source Global Research for the second consecutive year"

