IBM Consulting

G-Cloud 15
IBM - Finance Planning and Reporting Reinvention

Service Definition Document

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Contents

IBM's Finance Planning and Reporting Reinvention offering delivers user-centric, AI-enabled strategy, design, and transformation services that improve productivity, forecast cycles, data accuracy, and decision-making while leveraging IBM's proven finance-transformation experience to create sustained client

Features

- Our end-to-end Finance Planning and Reporting practice provides user-centric strategy, design and transformation services that can be either Planning, Budgeting, Forecasting and Reporting platform-agnostic or specialised to a platform or application of choice.
- We take our clients on a journey from Strategy and Design to Enablement, guiding them towards a talent-centric, data driven and AI/GenAI-powered organisation. This approach enables us to support you wherever you are on your Finance Transformation journey and with whichever technology options you have available to you.

Benefits

- Productivity improvements
- Optimised Finance Planning & Reporting operating model
- High organisational performance
- Reduction in planning, budgeting and forecasting cycle times.
- Improved financial data accuracy, transparency and integration
- Improved costs management and investments.
- More impactful business decisions through rapid data availability and improved variance analysis
- Focus on higher value work
- Finance assumes role and enhanced meaningful purpose to focus on driving organisational performance, through enhanced data and metrics visibility

Major differentiators

- Alongside driving Planning and Reporting transformation for our clients, IBM Finance has been at the helm of transforming our own organisation for the future, toward a cognitive enterprise. We have fundamentally transformed Finance, the IBMer experience and our workforce.
- Having pioneered the future of Finance, IBM Finance has become the de facto case study for cognitive Finance transformation.
- We leverage this experience and apply our lessons learnt to create real value for our clients.

Client Challenges and Business Outcomes

Department-wide finance transformation is critical to address the key **planning, budgeting, forecasting & reporting** business challenges:

Technology Capabilities

Unprecedented requirements to embrace technology and data through the deployment of AI/GenAI and machine learning

Improved Decision-Making Data

A growing demand for faster relevant business decision support data

Finance Expectations

Expectations of Finance to be one of the key drivers of strategy in terms of planning, decision support and execution

IBM helps organisations align planning, reporting and operational processes by integrating data, advanced analytics and AI-decision support to improve efficiency and the overall impact of finance on business outcomes

Business Strategy and Finance delivery misalignment

- IBM will work with you to drive efficient planning and reporting processes, technology, through the deployment of AI/Gen AI infused data-driven decision support
- Using a proven diagnostic, data-driven approach, we will help you build the business case for implementing next-generation, integrated planning and reporting into your everyday operations - allowing you to concentrate your focus on driving the right business decisions at the right time with confidence

Business Outcome

- Finance making more impactful business decisions based on advanced and integrated data, scenario analysis and analytics. Unlocking the true value of Finance.

Operating plans misaligned with Finance Plans

- IBM will provide an approach to implement integrated business planning, bringing together operational plans to enable the delivery of automated financial plans that have transparent data sources and consistency in reporting across operations and finance
- Using advanced planning techniques, as well as the deployment of business value drivers we enable departments to drive automated and integrated business planning, coupled with AI and Machine Learning to support forecasting and scenario analysis

Business Outcome

- Productivity improvements through increased efficiency of planning and forecasting enabling the capacity for Finance Teams to focus on driving business value as well as improved financial data transparency and consistency across operations and finance.

Ensuring finance and reporting can thrive by **modernising processes, technology, and skills to reduce cycle times**, improve planning and forecasting and enabling finance to focus on higher-value, data-driven decision making

Process and data driving reduced cycle times for planning and reporting delivery

- IBM will help you articulate the Finance processes and data model to enable effective delivery of planning, budgeting, forecasting and reporting.
- Putting users at the heart of the transformation and utilising best in class processes to identify and deliver the transformation enablers applicable to a department and their technology of choice.
- Enhancing the skills, technologies and knowledge for the Finance organisation in the new ways of working to enable the realisation of the new Finance agenda without business change resistance.

Business Outcome

- High organisational performance, improved planning cycle efficiency and forecast accuracy from the successful implementation of class leading processes and the redefining the role of Finance in planning and reporting.

Technology evolving at a faster rate than ever before – Finance Planning and Reporting technology outdated

- IBM will work with you to shape your digital Planning and Reporting requirements, through our user-centric design approach.
- Using our deep product and market expertise, we will help you assess which digital solutions best meet your specific business needs and will help you build a business case to support the change – allowing you to produce a Digital Finance Planning and Reporting Roadmap that will keep Finance at the forefront of digital service provision.

Business Outcome

- Clear plan and clarity on which technology, that once implemented, will enable Finance to focus on higher value work as the administrative burden is removed through automation, AI/GenAI and Machine Learning

With streamlined reporting and operating models that improve efficiency, expand capacity and drive transformation powered by automation and AI

Finance Reporting delivery too costly and inflexible

- IBM will bring its wealth of Finance Reporting transformation experience to help you reimagine delivery of end-to-end Reporting and Analytics services across your organisation
- Our Design Thinking and agile approaches, we will co-create with you the future organisation, people, process and technology designs – providing you with a joined-up and efficient Reporting service delivery model, leveraging automation and AI/GenAI

Business Outcome

- Optimised Finance Model Model, Service Delivery model and capabilities to meet business strategy and future- proof Finance. Costs managed through focused investments in value adding activity

Finance capabilities and capacity unable to drive department-wide transformation at scale

- IBM will provide you with the capability and capacity to drive department-wide transformation for every step of the journey
- Using our deep expertise and experience in back-office transformation, we will help you plan and manage the full transformation programme lifecycle, from current state analysis and business case to end state implementation and benefits realisation.

Business Outcome

- Department-wide transformation to a new digitally-enabled, experience-led working environment, allowing workplace effort to focus on class leading delivery and being able to identify the right business decisions expediently

Service Definition

Our end-to-end Finance Planning and Reporting offering delivers user-centric strategy, design and transformation across planning, budgeting, forecasting and reporting.

We work platform-agnostically or with your chosen technologies to create data-driven, AI and GenAI-enabled capabilities. From strategy and design through to enablement, we help clients build talent-centric, intelligent Finance functions.

Our flexible approach ensures we support you at any stage of your Finance Transformation journey, using the tools and platforms that best meet your needs.

IBM Approach

We provide a tailored E2E approach to transform finance planning and reporting by aligning strategy, technology and AI driven capabilities into a clear roadmap that accelerates digital maturity and future ready performance

Finance Planning & Reporting Strategy

Activities:

- Finance Planning and Reporting functional and technology advisory
- Planning & Reporting health check, maturity assessment and value/ ease analysis
- Planning and Reporting strategy development
- Business Case development with Benchmarking
- Digital Roadmap development
- Process and data maturity roadmap and execution

Finance Technology Strategy, Roadmap & Assessment

Activities:

- As-Is Technology assessment & optimisation opportunities
- Future technology vision aligned to Finance strategy
- Market insights and high-level vendor comparison
- Vendor evaluation: an accelerated approach designed for Cloud HCM, covering:
    a) Critical requirements and differentiators
    b) Weighted scoring / RFP / scripted demonstrations / UX testing
    c) Short list evaluations / negotiation support.

Integration of emerging technology into Finance Planning and Reporting

Activities:

- Phase 0: Planning and Reporting technology assessment and Business Case development
- AI/GenAI and robotic automation advisory
- Digital technology application and evolution
- Digital Finance health check
- Digital Finance Phase 0 ‘Art Of The Possible’
- Digital Finance value assessment and business case, leveraging industry benchmarking
- Digital Finance roadmap and milestones
- Preparing for Predictive Planning and Forecasting

Ensuring your finance processes, people, and operating models are modernised and upskilled to deliver user-centred, analytics-driven planning and reporting in an increasingly automated and efficient environment.

Improving User Experience

Activities:

- Planning & Reporting process improvement and (re)design
- User Experience co-creation with focus on creating user-centric design across:
    a) Planning
    b) Reporting
    c) Predictive Modeling and Analytics
- Delivering skills and knowledge development

Building Finance Planning & Reporting Capabilities

Activities:

- Re-skilling and upskilling of Finance Planning, Reporting and Analytics resources:
    a) Planning for and delivering Centers of Excellence
    b) Finance skills assessment

Dynamic Finance Planning Reporting & Analytics Operating Model & Service Delivery

Activities:

- Operating Model Design and implementation, including Shared Services
- Organisation Design
- Outsourcing and service catalogue definition
- Retained organisation role development
- Transition and transformation
- Integration of AI/GenAI into Finance Planning and Reporting.

Delivering increasingly **automated, streamlined, and insight-rich reporting** and **analytics** using AI and GenAI to move our clients toward low-touch or touchless forecasting

Low-touch Forecasting

Activities:

- Redesigning workflows to be transparent and agile – with embedded AI, analytics, and a "low-touch" ledger
- Establishing global planning processes and reporting that are harmonised and are integrated to your Enterprise Performance Management system.
- Establish and prepare the business for low-touch predictive forecasting, generated by AI and machine learning that is automated end to end.

Touchless Forecasting

Activities:

- Establishing an Integrated Enterprise Performance Management Data Platform
- Creating a data science pipeline that predicts data elements with different models
- Embedding AI/GenAI within your planning environment
- Establishing "On the Glass" interactive reporting capability and proactive analysis

Cognitive Finance Reporting and Analytics

Activities:

- User Centric / Design Thinking approach to understand pain points, desired outcomes and build the future vision for Financial Analysis
- Current metrics and costs assessed and benefit levels predicted
- Implementation roadmap, investments required and ROI calculated
- Business Value Realisation support; defining metrics, ownership, aligned to solution.
- Assessment of the tools and techniques to best deliver the critical objectives
- Creating knowledge share and transition solutions to create self sufficiency and sustainability
- Co-creation of analytics solutions to address decision support challenges
- Implementation of AI/GenAI driven solutions to enable automated reporting and delivery
- Implementation of Intelligent Workflow solutions
- Embedding of Automation into Reporting processes
- Role augmentation leveraging Intelligent Workflow and Automation

AI/Gen AI in FP&A

Gen / Agentic AI-infused planning is taking FP&A on a journey to self-optimising insight to enable high accuracy financial decision making

A modern finance function can evolve along three distinct technology paths—Traditional AI, Generative AI, and Agentic AI

Foundation → **Predictive** → **Cognitive** → **Self-Resolving** → **Autonomous**

AI

Bots load data, freeing time

1. RPA loads actuals into a Financial forecasting tool
2. ML creates baseline time-series forecasts

ML detects forecast variance outliers and flags at period-close

(rules can't craft narrative or build decks)

Forecasts become consistently more reliable

Gen AI

Gen AI tells me why targets drift

1. LLM ingests unstructured drivers (news, social, weather) to enrich forecasts
2. Gen AI explains deviations in plain language—"demand dip tied to competitor promotion"
3. Chat copilot answers "Why did gross margin drop in APAC?" and builds board-ready charts
4. Gen AI proposes driver tweaks and rolling forecast adjustments for FP&A lead approval

(human-in-loop for policy)

Insights surface instantly, enabling rapid decisions

Agentic AI

Agents fine-tune plans while I craft the next growth narrative

1. Agent monitors data feeds, pre-populates driver assumptions before planners log in
2. Agents simulate P&L, cash, and balance-sheet impacts of external shocks and alert CFO early
3. Agents auto-assemble variance decks, scenario books, and talking points overnight
4. Agents test hundreds of micro-scenarios, choose top 3 with actions needed for final decision maker
5. Networked agents continuously recalibrate forecasts, allocate capital across business units, and offer strategic corrections

Profitability and strategic agility reach new heights

IBM delivers a fully automated, AI- and GenAI-enhanced reporting ecosystem that streamlines end-to-end finance processes, maximising efficiency, accuracy, and decision-making impact

Automation Platform

Journals Automation

Auto prep, analysis, anomalies deduction

AIRA

AI Reconciliation Assistant

AI augmented automatch and substantiation

Analytics and Gen AI (CFO Playbook)

CFO (Exec) Playbook

Automated Executive read outs, highlights

Standard Reporting

Management reports, periodic reviews

Digital Assistant

Self-service & Real time prompt-based querying

Balance Sheet Risk, Flux Analysis

Risks, Variance root-cause analysis & alert triggers

Use Cases

General Accounting

Journals:
- Auto Preparation & Risk analysis
- Anomalies Deduction & Threshold Analysis
- Real time monitoring and status Queries (Gen AI)

Reconciliation:
- Auto creations & summary of risks & mitigating actions
- Balance sheet Review Risk identification (Gen AI)

Period Close:
- Real Time Close Monitoring (Gen AI)
- Delay alters and implications on close

95%
Touchless process with continuous financial closing
50%+
Productivity through predicted and touchless processes

Fixed Assets

Capitalization:
- Auto creation of Assets
- Risk & Anomaly on capitalization – Timeliness, Reclass

Project Management:
- Query management by Project Manager: status, progress, utilization
- Delayed projects altres and follow-up
- Year end review and rectifications automation
- Budget Vs Actual analysis and variance analysis and alters

95%+
Touchless FA transaction processing

20%+
Cost reduction for FA function in the organization

Intercompany

Contract Management:
- Auto Invoice creation

O/I and Disputes:
- Open items Management and Monthly IC statements
- Monthly Journals and Reconciliation preparation
- Dispute Queries Management (Gen AI)

90%
Intercompany disputes eliminated

Zero
Intercompany aged open items

Financial & Management Reporting

Report Writing:
- CFO Dashboards
- Management Review Packs

Analysis:
- Commentary, Narratives and Operational Analysis
- Financial Queries (Gen AI)
- Global KPIs metrics measure and analysis
- Predictive Analytics

100%
Real-time visibility to key decisionmakers of enterprise performance
90%
improvement in time to decision support

FP&A

Budgeting & Forecasting:
- Historic Budgets comparisons & Insights
- Revenue Forecasting
- Cash forecasting
- Auto prepare periodic Forecast (rule based)

Analysis:
- User Query management (GenAI)
- Product costing Analysis
- Performance and profitability analysis

50-60%
More time in business partnering through use of digital insights
>95%
Reduction in manual analysis and report creation

Controls & Compliance

Audit & Internal Controls:
- Pre-Audit reviews and Risk rating
- Policy Queries (GenAI)
- Risk Identification and Assessment
- Automated Monitoring
- Data Validation and Anomalies Deduction

100%
Internal Control and SOX compliance

30%+
Compliance effort reduction

Automation
AI
Manual

Gen AI Solution
Analytics solutions, potential for Gen AI
IW modules, Gen AI infusion in works

Our Analytics and GenAI CFO Playbook equips finance leaders with **automated executive reporting, self-service insights, and real-time risk and variance analysis** so they can access the right information at the right time to make better, faster decisions

Analytics and Gen AI (CFO Playbook)

Functionalities

Re-imagining the future of financial analysis & reporting, seamlessly integrating AI, ML and Gen AI into existing processes

CFO (Exec) Playbook

Automated Executive read outs, key highlights

- Automated generation of executive financial reporting – charts, tabular data, aggregations by BU, verticals, overall)
- Management reporting commentary – performance highlights & contributors, compliance checklist/callouts for all key finance heads & performance buckets
- Export in standard word, pdf or power-point format

Standard (+custom) Reporting

Leadership reports for management reviews

- Automated generation of operational reports
- Recurring standard operational reports
- Commentary generation for manual validation
- Export in standard excel or power-point format

Digital Assistant

Self-service & Real time prompt-based querying

- Persona based pre-configured prompts & natural language querying: CFO/CxO, Finance Controllers, Finance Analyst.
- Document Analyser Utility: Upload any financial document and analyse using natural language queries (contextual search)

Balance Sheet Risk, Flux Analysis

Risks, Variance root-cause identification, trigger alerts

- Month-end close performance analysis
- Variance analysis for current vs prev. month, Current YTD vs. Prev Year end, Current vs. Prev year same month
- Variance drivers for priority accounts
- GL specific automated Commentary generation
- Reporting, highlights balance sheet risks
- Projected coming due transactions

We can infuse AI Agents into Future Finance Forecasting processes, shifting from rule-based processing to autonomous goal-oriented execution

Create Baseline Forecast				Scenario & Sensitivity Analysis		Finalise	Monitor
Set Baseline Assumptions	Analyse Trends & Patterns	Generate Baseline Forecast	Review, Refine, & Layer Business Input	Action Plans for Gap to Target / Budget	Run Scenario & Sensitivity Analysis	Finalise, Align, & Communicate	Validate and Refine

KPI Goals

Decrease manual effort, improved accuracy → Decrease cycle time, improve insights → Improved decision taking; Reduced manual workload → Real time insights → Improved decision taking → Better understanding and improved decision taking → Better tracking

AI AGENTS

Data Ingestion Agent
- Ingest data from various sources
- Validate and reconcile data
- Manage data for Analysis
- Augment the data with computed ratios

Insights and Forecasting Agent
- Analyse past data for trends and pattens
- Provide quantitative estimate for future outcomes

Risk & Opportunity Analysis Agent
- Identify Risk and Opportunities
- Provide recommendations for business actions
- Detect conflicts
- Identify anomalies
- Identify gaps

Optimisation Agent
- Identify drivers & levers
- Detect leakages
- Recommend optimisations
- Suggest optimal allocation logic
- Highlight trade-offs

Performance Monitoring Agent
- Detect variances
- Analyse variances
- Monitor for material changes
- Track metrics & actions

Simulation Agent
- Model forward looking impacts
- Generate scenarios
- Run sensitivity analysis
- Rank scenarios based on feasibility

Narrative Commentary Generation Agent
- Synthesise findings
- Propose recommendations
- Develop targeted communications
- Generate commentary

Reporting Agent
- Create reporting visuals (dashboards, charts)
- Prepare standard decks

Automation Agent
- Automate workflows
- Integrate systems
- Generate alerts
- Route and track communication

FP&A Persona

FP&A Analyst: Define rules for data; validate data accuracy; analyse and correct flagged inconsistencies

Review trends and patterns, validate assumptions

Address flagged conflicts, review R&O and anomalies, validate with the business

Business Unit Leader: Review drivers and levers, validate outputs with the business

FP&A Analyst: Review variance analysis, validated material changes with the business, understand key drivers for metrics changes

FP&A Analyst: Review scenarios and scenario ranking, discuss trade-offs with the business

FP&A Analyst: Review and understand commentary, provide persona descriptions for tailoring, flag key stakeholders

Review and understand charts and decks

CFO: Understand and validate and agree actions with the business, define gap closure roadmap, ensure accountability

Enterprise Apps

- ERP Systems (Oracle/SAP etc)
- Demand planning, Supply planning, HR systems, Procurement systems, AP, AR, Inventory management systems, Fixed assets and Capital planning systems, Logistics planning systems, Data lakes
- Financial planning platforms (SAP SAC, OneStream, Oracle Cloud ERP, Workday Adaptive Planning, Anaplan, IBM planning Analytics)
- Reporting & Consolidation platforms (SAC, OneStream etc; Oracle Fusion, Power BI)

Our touchless forecasting solution uses intelligent agents to automate forecasting end-to-end, detecting deviations, tracing root causes, and triggering coordinated plan adjustments across functions to deliver faster, more accurate, real-time financial insights and cross-functional decision-making

This use case reimagines financial planning by embedding intelligent agents that continuously gather data, generate forecasts, and trigger real-time adjustments across FP&A, treasury, and business units.
When a forecast deviation is detected, agents:

- Identify anomalies
- Trace root causes
- Recommend and trigger aligned plan changes across functions

Agents operate seamlessly across systems like **SAP SAC, OneStream, Oracle Cloud ERP, Workday Adaptive Planning, Anaplan, and Planning Analytics**, enabling coordinated actions, real-time governance, and audit-ready forecasts.

For FP&A teams, this solution reduces the burden of manual data consolidation and model updates—enabling faster scenario planning, greater forecast accuracy, and agile response to change.

Key Processes Impacted: Data Management | Forecast Management | Change Management
Use Case Affects: Data Management, Forecast Management, Change Management

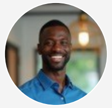
Personas

Eric | FP&A Analyst

Eric reviews assumptions, trade-off, ensures alignment with business strategy, selects focus drivers, interprets outcome patterns, and maintains message clarity.
He **leads discussions**, answer questions, and **provides context and expertise**.

Naomi | Chief Financial Officer

Naomi shifts her attention from validating numerical data to **orchestrating resource allocation discussions, effectively bridging business unit disparities and fostering a collective comprehension of the organisation's future direction**. By doing so, she ensures the **seamless integration of AI-generated insights into actionable business outcomes.**



Hassan | Business Unit Leader

Hassan shifts his focus from retrospective analysis to a forward-looking approach. By **validating AI-generated assumptions**, he gains confidence in the forecasts' accuracy and reliability. **Leveraging AI insights,** Hassan explores new business opportunities, gaining a deeper understanding of market trends and potential growth areas, enabling him to stay ahead of the competition. With a clear grasp of the **impact of various AI-populated scenarios** on his business line, Hassan remains asile and responsive to market dynamics, **making informed decisions** that optimise resource allocation, drive innovation, and ensure his business unit's continued success.

Key Business Value

- Enhanced decision-making speed and accuracy
- Real-time insights and consistency
- Proactive risk management and issue resolution
- Robust risk planning and prioritisation
- Improved cross-functional collaboration and alignment
- Constant Innovation and Growth opportunities detection

Focus Industries

Across Industries
Use case is applicable to all large organisations.

Case Studies

Finance Reporting

reckitt

Challenge

Traditional Record-to-Analyse is constrained by manual processes that are time-consuming and prone to errors. Data is scattered across many sources, often requires extensive preparation, and the quality of insights is dependent on the preparer's expertise. Additionally, this process is under tight deadlines to deliver timely insights.

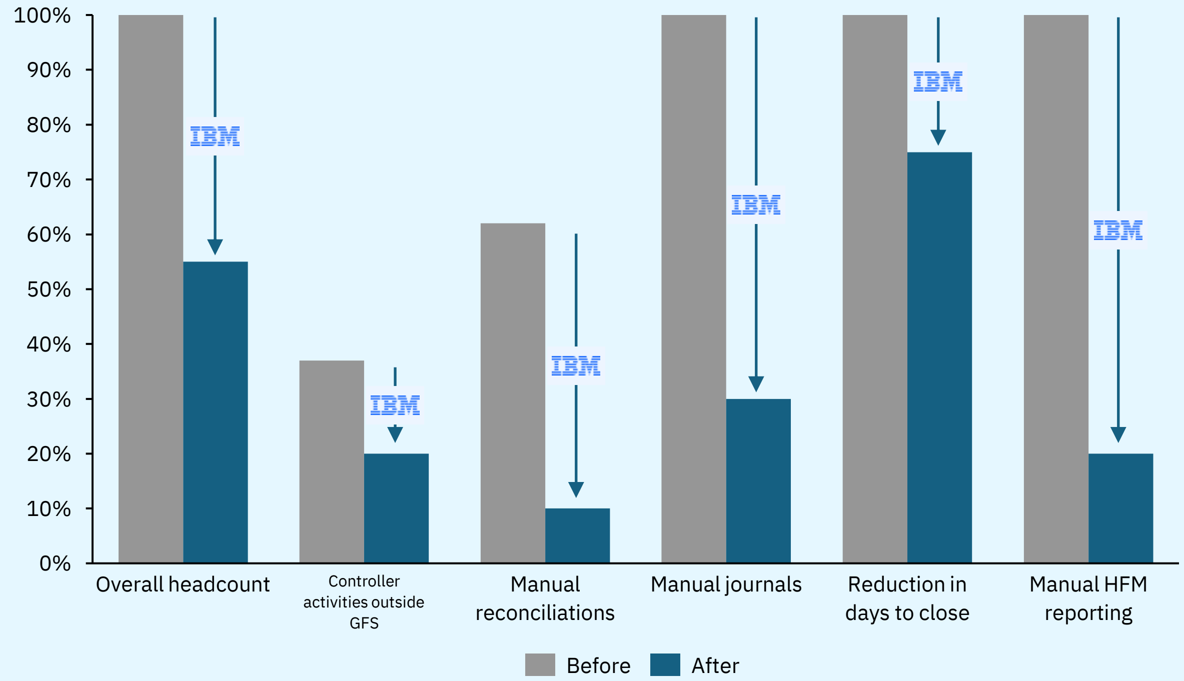
Solution

Collaborated with the client to deliver a world class technical infrastructure and supporting operating model, eliminating biases and reducing reliance on institutional knowledge. Solution elements:

- **Standardisation** of policy, process and templates across markets
- **Automation** through SAP SAC, HFM, Blackline and IBM's Variance Analysis AI solution
- **AI generated variance analysis and commentary** – reporting highlights and supporting narrative for C-level users
- **On-demand** content generation, from insights to dashboards
- **AI Assistant** for visibility into performance insights

Scale and Operational Impact

Improvement in Key Metric – Retained Scope



Outcomes

Close cycle reduction	Touchless reporting	Controller tasks with IBM	Headcount productivity
From 4 to 3 days	**80%**	**+17%**	**45%**

IBM has transformed its own Finance & Accounting function into a best-in-class model by leveraging AI, automation, and modern operating structures to achieve major productivity gains, improve forecasting accuracy, and eliminate manual work

Within IBM's own Finance & Accounting function, we have transformed ourselves to realise 40% productivity gains to date, and significantly improved forecast accuracy, by leveraging AI and Agentic AI to delivery cost saving efficiencies and enhance decision support.

Objectives: *Drive productivity and accelerate cycle time in F&A and pricing functions by streamlining processes, enhancing insights from data and improving process efficiencies to empower decision-making.*

Key productivity initiatives:

FP&A transformation

Implemented touchless financial forecasting through predictive data analytics to improve forecasting accuracy by leveraging IBM Cloud Pak for Data and EPM to collect and organise historical data, and Watson APIs to generate machine learning model.

Global shared services

Restructured the accounting function by migrating from geographical silos to a centralised, standardised and process-based operating model through global CoEs.

Adopted a global process ownership model by established an FP&A CoE in Mexico to establish a centralised group of specialists with common competencies.

Process simplification and automation

Automated manual tasks conducted for bid approvals and accounting processes using Robotic Process Automation (RPA) augmented with AI/ML and AskAccounting chatbot.

AI-powered decision making to accelerate and optimise processes

Enabled Cognitive Contract Application (CCA) for IBM's Sales and Accounting teams, leveraging Watson Discovery, to accurately identify obligations and efficiently minimise risks on contractual conditions.

Implemented the Cognitive Pricing Analytics (COPRA) solution that recommends optimal pricing for each individual customer based on geographic location and buying patterns to accelerate pricing approval process and customer adoptions.

Example use cases

FP&A transformation

→ **Touchless forecasting**
Predictive analytics for forecasting

→ **Enterprise performance management**
Single source of truth for financial data

Cognitive finance

→ **Cognitive contract application**
De-risk and accelerate contract review

→ **AskAccounting chatbot**
Conversational AI assistant for accounting operations

Impact

Forecasting accuracy

95%

Benchmark accuracy through Touchless Forecasting

Productivity gains

40%

In financial planning and analytics

Manual hours

200k+

Saved per year through AI/ML augmentation in routine F&A processes

IBM eliminated fragmented reporting and manual data consolidation by implementing a unified Enterprise Performance Management platform

Challenge

To compete effectively in the high growth areas of Hybrid Cloud and AI, IBM had to accelerate decision velocity and drive enterprise productivity. Historically, IBM had fragmented and overlapping work, systems, and data models that made it difficult to consistently deliver business insights. Significant time was spent consolidating data for reporting, which required a IBMers to work as "human glue" pulling data from different systems and manually putting data together in spreadsheets and slide presentations. In fact, 63% of an analyst time was spent producing reports instead of generating insights. This was highly unproductive. IBM had 40K meetings a year across the company simply focused on reviewing data. It had an IT reporting sprawl with 70K report types and over 300 reporting apps.

Solution

IBM created an Enterprise Performance Management (EPM) platform as the trusted source of integrated enterprise data and a catalyst for faster decision making. Based on one enterprise data model, EPM integrates data from all trusted enterprise sources across geographies and business units, breaking down historical data siloes. EPM standardises KPIs and aligns data to enterprise data standards to deliver interactive dashboards and a culture of working "on the glass". This leads to more proactive analysis and action, driving IBM's growth and enterprise productivity.

$200 million	in business value from EPM
25 thousand	unique EPM users in 2023
70%	enterprise workflows enabled on EPM across IBM
300+	reporting applications aggregated through a single data model and platform
18 TB	of integrated enterprise data

IBM has accelerated query resolution by deploying the watsonx-powered AskEPM chatbot, enabling instant, AI-driven answers or SME routing for complex EPM questions

Use case: Enterprise Performance Management & Digital Labor

AskEPM: Resolving complex business questions anytime with **watsonx**

Challenge

IBM's Enterprise Performance Management (EPM) platform delivers trusted business insights and analytics from across the enterprise. Built on one unified data model, the platform brings together insights from marketing, sales, finance, operations, HR, and supply chain.

The platform had 25K users in 2023 and adds thousands of new users each month. Users ask questions on topics ranging from access requests, data refresh updates, report trouble shooting or for complex business questions.

The EPM team needed a way to engage users quickly and enable fast self-service.

Solution

IBM created AskEPM, a watsonx chatbot that provides answers to rapidly resolve complex business questions.

Embedded within a slack channel for all EPM users, AskEPM responds in seconds to all users' questions and provides helpful insights and links. In the background it tags the question for the right support team so they can monitor the user's interaction with AskEPM or engage the user directly.

By connecting the user with the right subject matter experts, AskEPM greatly enhances the user experience while leveraging generative AI to provide comprehensive descriptions of answers, including helpful links to guide the user to a "touchless" resolution to their question.

Instant Response	100% of questions answered either by AI or connecting to an SME
SME Matching	Engages the right expert team, eliminating the "ask around" process
5K+	Hours saved per year
25K+	Users engage AskEPM per year

Solution includes: **watsonx**.ai

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

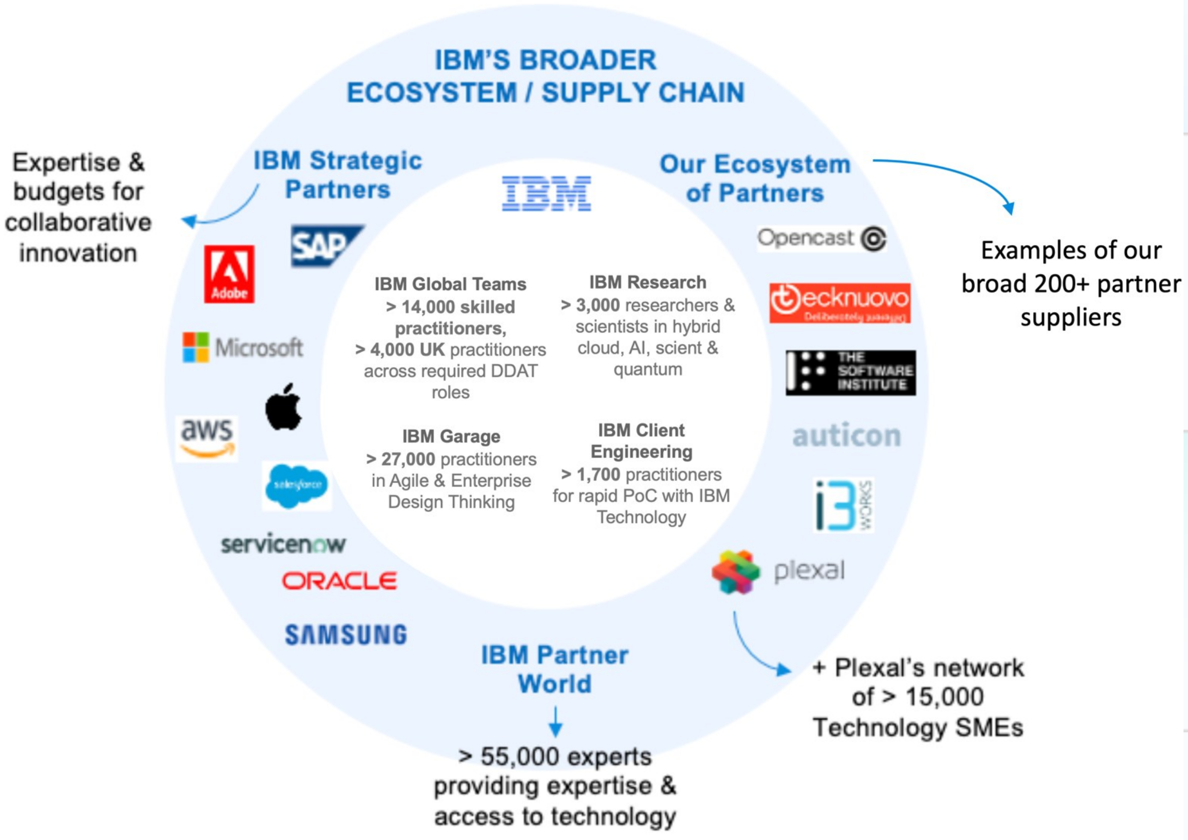
Experience in UK Government industry, aligning c-suites behind an integrated vision

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)

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"