

Marcus Dietrich – Senior Performance Management Specialist

Bangkok, 17th July 2012

New Innovations for Planning, Analysis & Forecasting in IBM Cognos 10



New Pressures

30%

Percentage of their companies' performance potential CFOs say is lost due to subpar enterprise performance management; some say that as much as 80% is lost.⁽¹⁾

65%


Percentage of CFOs citing business intelligence / analytics / performance management as the top technology initiative for their company in 2011.⁽²⁾

(1) The CFO Executive Board

(2) The CFO's Impact on Technology Investment Decisions, 2011, Gartner, FEI (Financial Executive Institute) Technology Study

Current Performance Management Failing

- Low frequency and participation
- Deteriorating relevance of results
- Low-value activities dominate



“The budget is the bane of corporate America. It should I never have existed”

Jack Welch, CEO of GE
Fortune magazine (May 1995)

Current Performance Management Failing



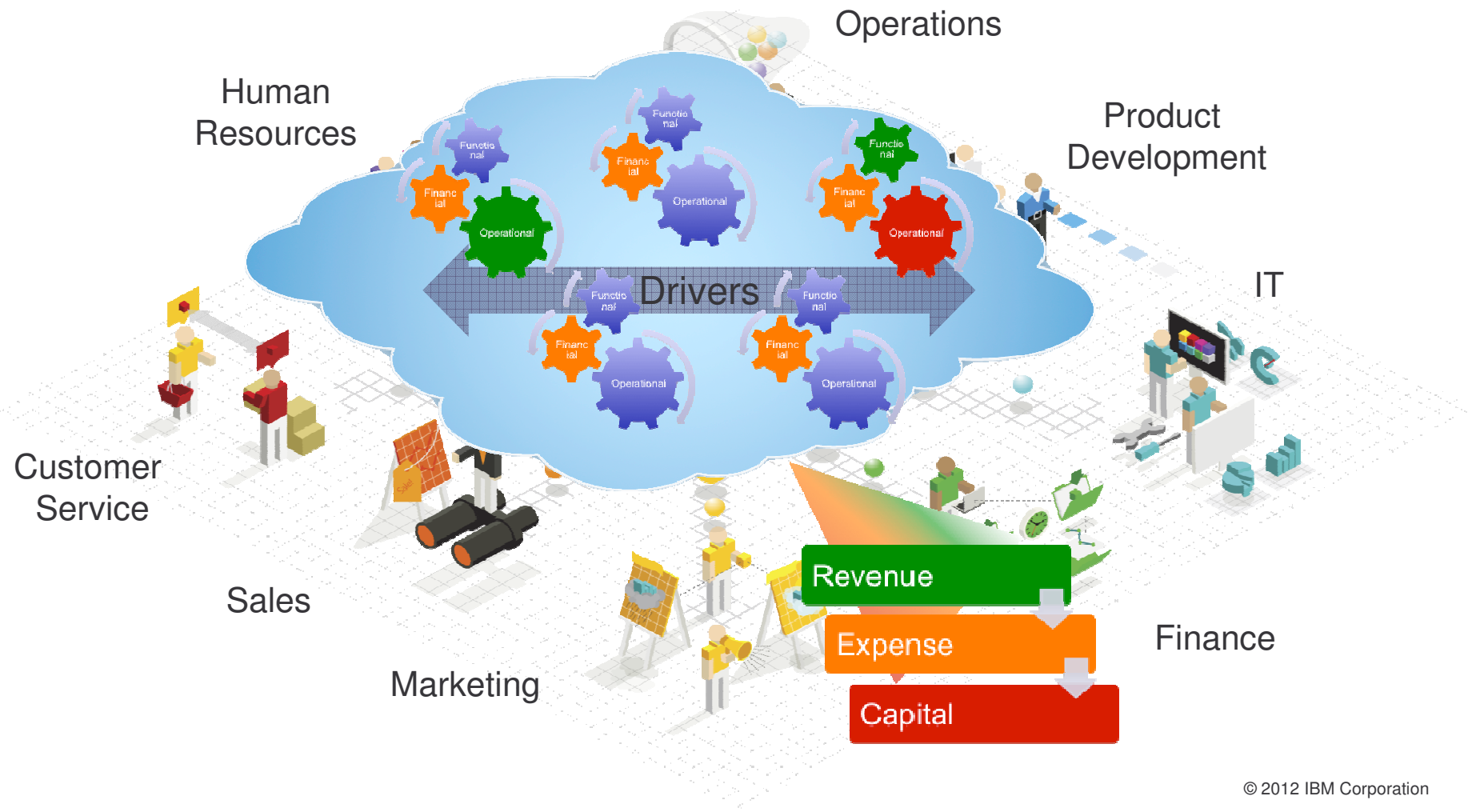
Transforming Performance Management Better Information, Faster Response



- ✓ **Common planning, reporting platform**
- ✓ **Linked finance and operations**
- ✓ **Data, process, metrics standards**
- ✓ **Advanced analytics**
- ✓ **High participation, scale, performance**

Transforming Performance Management

Gain time, control and confidence with IBM Cognos Enterprise



The 2011 BI Survey 10 ranked IBM Cognos TM1 ...

#1

- Goal achievement
- Self-service

The Planning Peer Group
BARC BI Survey 10

#1

- Goal achievement
- Self-service
- Suitability

The Database Peer Group
BARC BI Survey 10

Cognos
Enterprise

Cognos TM1 10

PART OF COGNOS ENTERPRISE

Available
NOW!

- Improved, flexible solution design environment
- Easily spans analytics and planning requirements
- Unrivaled performance at high user and data scale



Cognos Enterprise Performance Management: A Revolution with TM1 10



Performance Reporting and Scorecarding

Analytics

Customer Service



Marketing



Product Development



Human Resources



Sales

Operations

Finance

IT



Expense Planning & Control

Workforce Planning

Capital Planning

Strategic Finance

Profitability Modeling

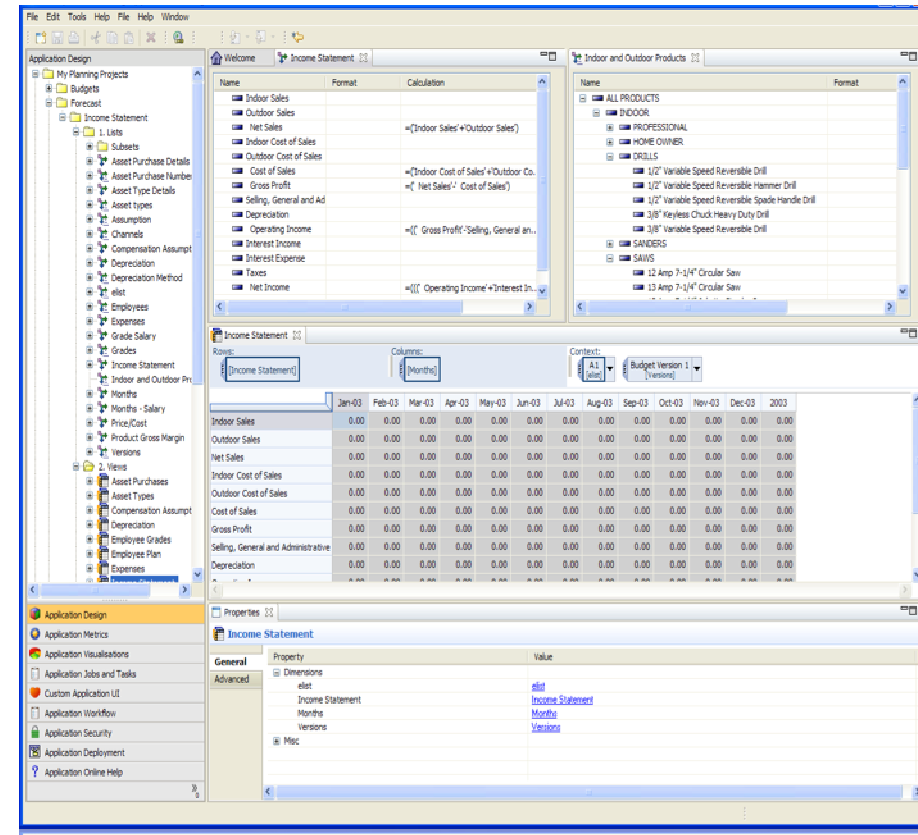
Enterprise Planning and Analysis



High Performance Platform

TM1 Performance Modeler: A Flexible Solution Design Environment

- **Simplifies design** for performance management solutions
- Empowers **MORE** planning application development, **more prototyping**
- Easily wires Cognos Insight “**personal analysis**” into enterprise solutions



Address Broad Range of Performance Management Challenges

Allows Fast, Easy Modeling

- **Guided modeling steps**
 - define dimensions
 - build cubes
 - define rules
 - easy linking paradigm
- Widespread use of drag and drop and **visual composition**
- Easy transfer of applications from development to test to production environments

The screenshot displays the IBM Model Design tool interface. At the top, a diagram shows the guided modeling process with four steps: 1. Define Dimensions, 2. Build Cubes, 3. Create Rules and Processes, and 4. Model Design. Below this, the tool's main workspace is visible, showing a 'Margin Plan' and an 'Income Statement' cube. The 'Income Statement' cube is selected, and its dimensions (Regions, Time, Income Statement) are shown in the 'Dimensions' pane. The 'Members' pane lists 'All Regions', 'NE Region', 'SW Region', 'East', 'South', and 'West'. The 'Mappings' pane shows the mapping of source and target regions. The 'Properties' pane at the bottom shows the cube's configuration, including its name, type, dimensions, and source/target links.

	Jan-03	Feb-03	Mar-03	Apr-03	May-03
Gross Sales	0.00	0.00	0.00	0.00	0.00
Discounts	0.00	0.00	0.00	0.00	0.00
Indoor Cost of Sales	0.00	0.00	0.00	0.00	0.00
Outdoor Cost of Sales	0.00	0.00	0.00	0.00	0.00
Net Sales	0.00	0.00	0.00	0.00	0.00
Cost of Sales	0.00	0.00	0.00	0.00	0.00
Gross Profit	0.00	0.00	0.00	0.00	0.00
Selling, General and Administrative	0.00	0.00	0.00	0.00	0.00
Depreciation	0.00	0.00	0.00	0.00	0.00
Operating Income	0.00	0.00	0.00	0.00	0.00
Interest Income	0.00	0.00	0.00	0.00	0.00
Interest Expense	0.00	0.00	0.00	0.00	0.00
Taxes	0.00	0.00	0.00	0.00	0.00
Net Income	0.00	0.00	0.00	0.00	0.00

Empowering more users to model, reduced time to value

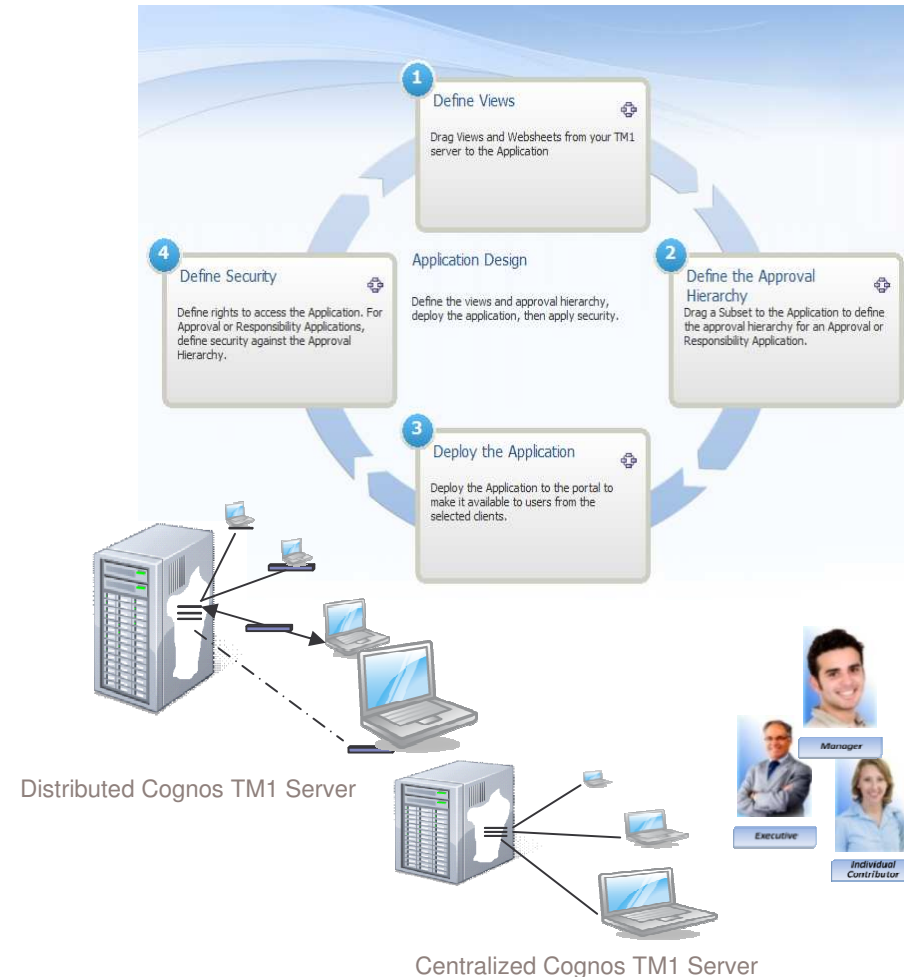
And Simple Application Deployment

■ Support for multiple application types, clients and connections

- Workflow/Non-Workflow
 - Approval Hierarchy/Continuous
- Client support
 - Web, Contributor, Cognos Insight
- Connection modes
 - Centralized or Distributed

■ Application Deployment

- Development or Production
- Cognos Connection or 3rd Party Portal

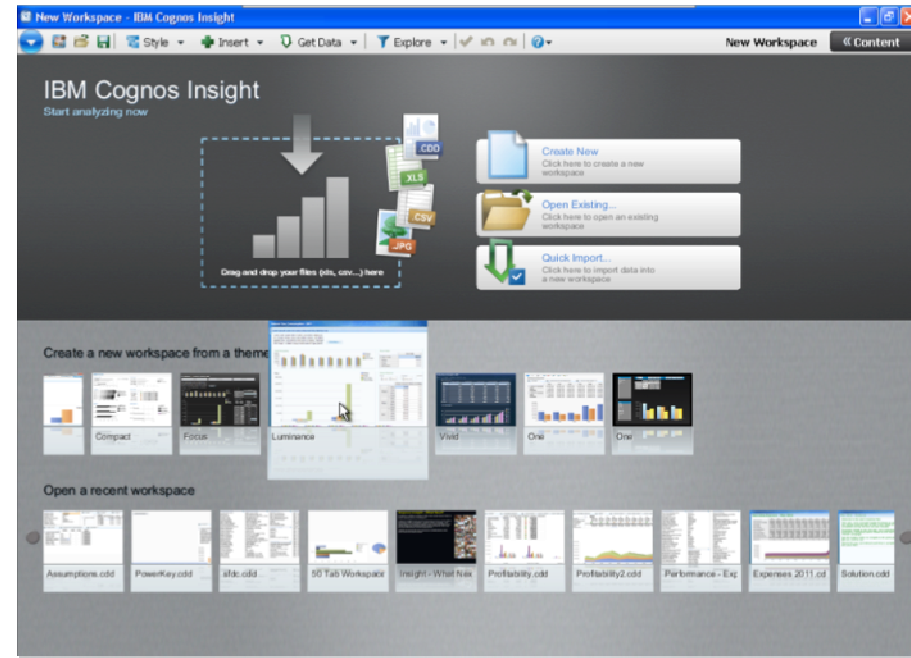


Unrivaled flexibility and performance at high user and data scale

Demonstration: Cognos Performance Modeler

Cognos Insight, a new, visually rich and interactive “canvas” for smarter contribution

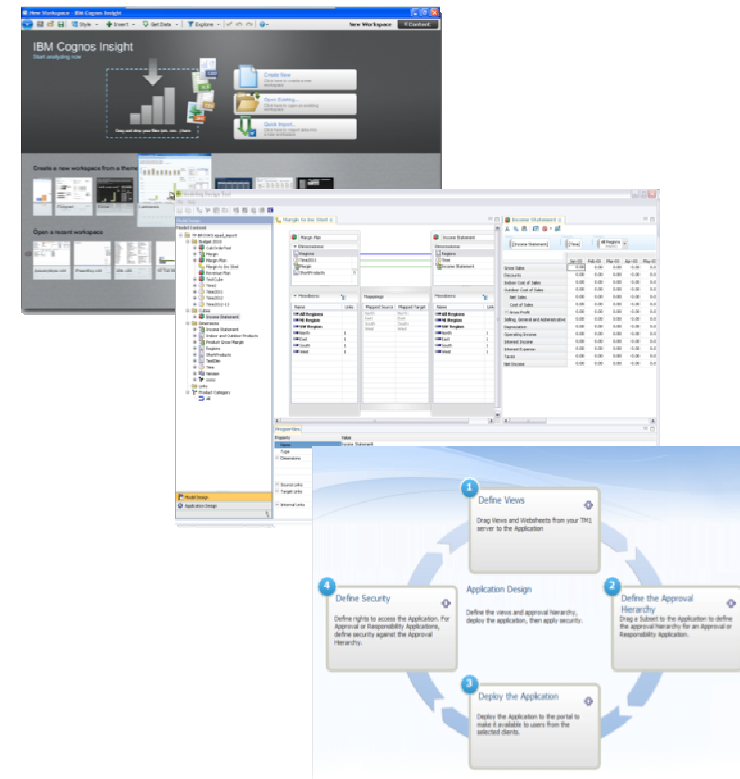
- Users work with their data of choice, on their desktop, without IT
- Discover trends and explore scenarios via speed-of-thought interactions
- Share findings & results within a workgroup or throughout the enterprise



New Users Connected to PM Processes

Takes insight into action with Cognos Insight

- **Analyze**
 - Prototype situations, plans
 - Work with existing or pull in new data
 - Perform what-if scenarios, associative analysis, profitability analysis
 - Customize views and “explore points”
- **Prototype a plan**
 - Create new version, shortcuts, views, charts
 - Create or add to dashboards
 - Add Instructions
- **Share and / or Initiate new workflow**
 - Promote insights in a tailored dashboard
 - Collect new information via workflow



Foundation of an agile planning and analytic platform

Demonstration: Cognos Insight

User Experience Flexibility

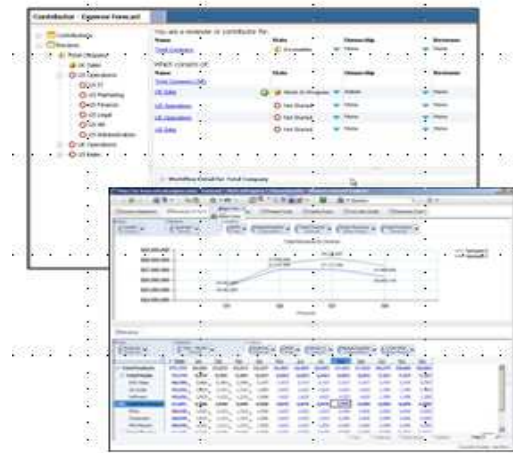
Excel-Based



Desktop – Cognos Insight



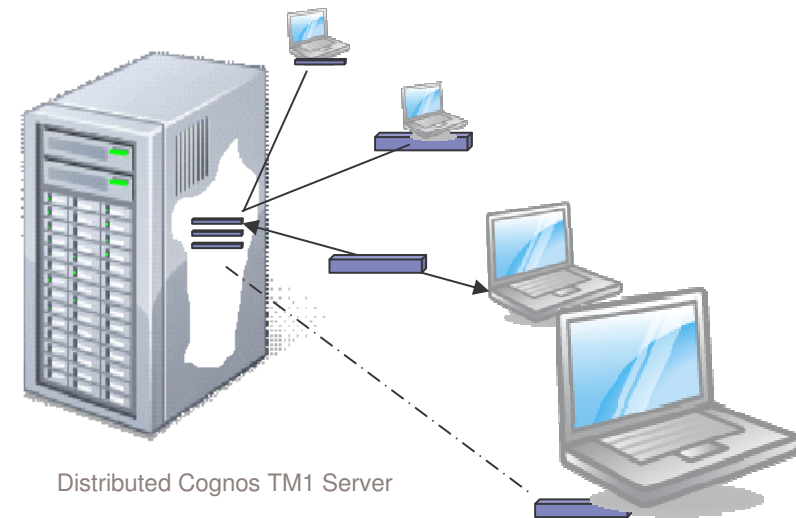
Managed Collaboration



Span All Users and User Experience Needs

Proven Analytics Engine

- Distributed Cognos TM1 Server
 - Improved WAN performance
 - Better user scale
- Built on the high-performance, stable 9.5.2 Server Engine
- First-in-line with parallel interaction
- More tools to accelerate ETL performance
- Multi-server management console



+20% Contributor
performance improvement

Delivers Quality, Scale, and Performance

“[Performance Modeler] will allow more people to develop TM1 solutions as well as speed up the development process.”

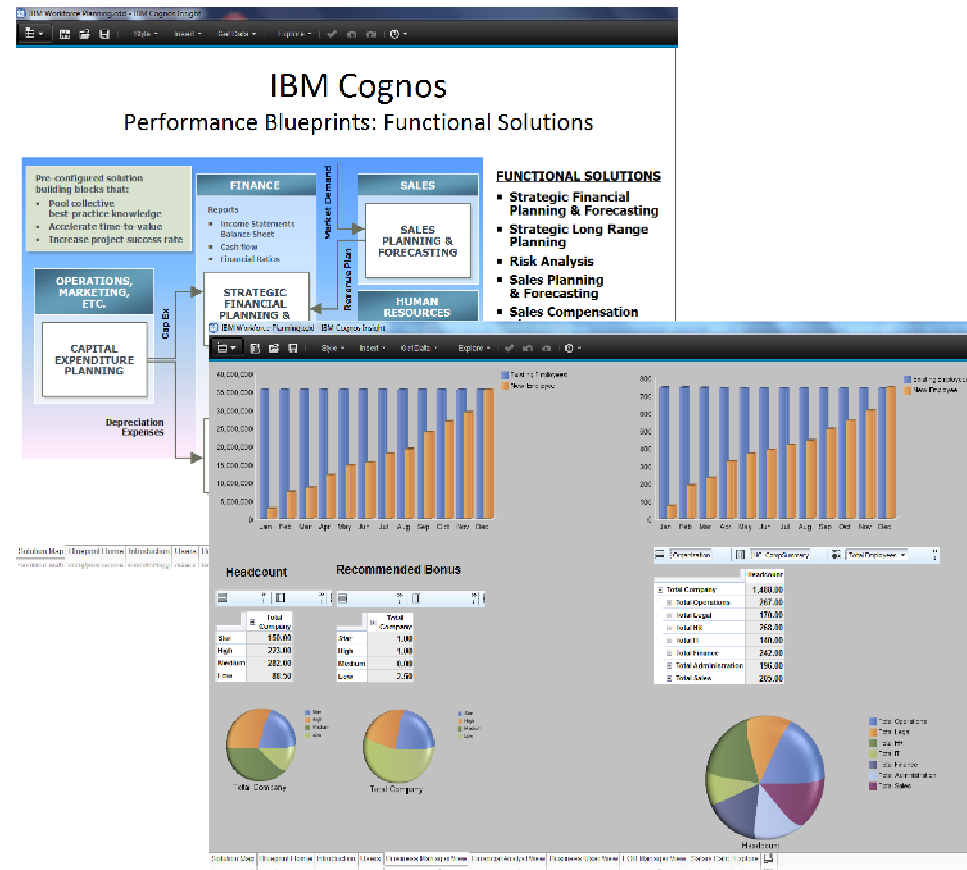
-- Jack Purvis, Senior Manager, BI/PM, DIRECTV

“The single product IBM Cognos solution with the personal desktop component wraps together the full cycle of processes – planning, analysis, forecasting, and reporting. You can easily create the templates or models for planning – and then roll them out to the enterprise over your WAN for rapid turnaround.”

-- Sherain Messenger, Cognos Competency Centre Manager, Hiscox

Performance Blueprints: Deliver Application Value on Single Technology Platform

- Support solution design, springboards for innovation
- Pre-defined data, process and policy models
- Exemplify technology-enabled best practices
- Many available today as Cognos Insight samples

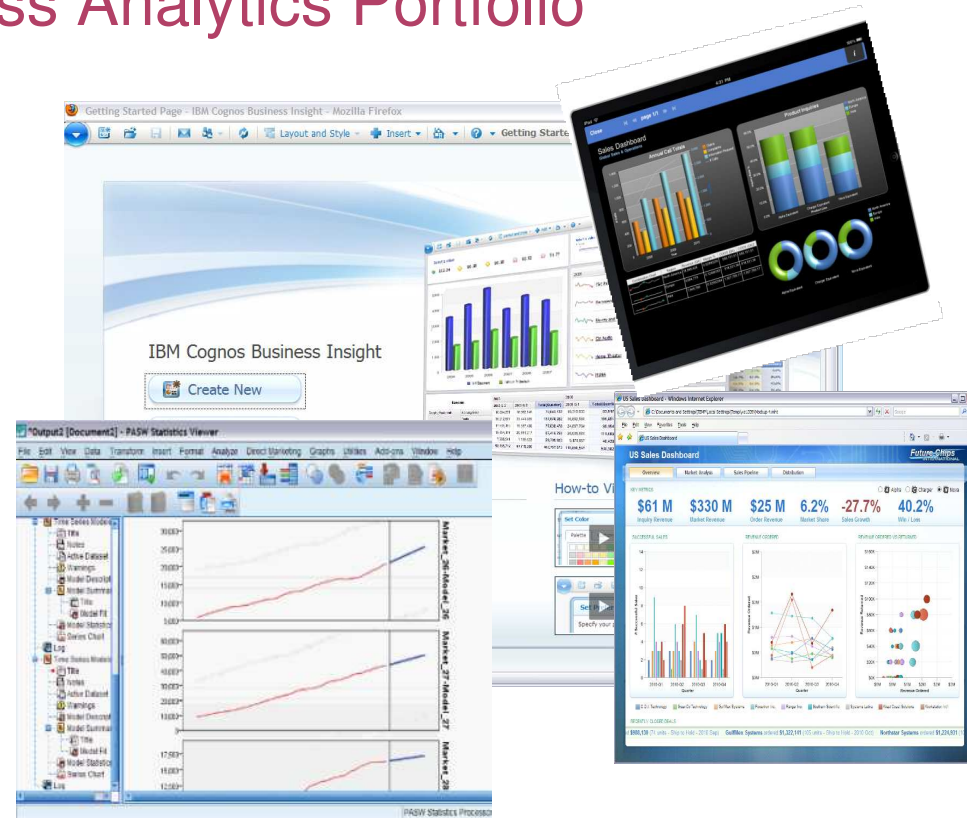


Reduce time, risk...Rapid time to value

Providing a full range Business Analytics Integration with IBM's Business Analytics Portfolio

Advances insight with:

- Business Intelligence
- Predictive and
Advanced Analytics
- Risk Analytics



IBM Cognos Lab Services: Guardian Services

- [Cognos TM1 Health Check Service](#)
- [Cognos TM1 Model Design Review Service](#)
- [Cognos TM1 Technical Design Service](#)
- [Cognos TM1 Upgrade Initiate Service \(new\)](#)
- Cognos TM1 Performance Testing & Tuning Service (new)

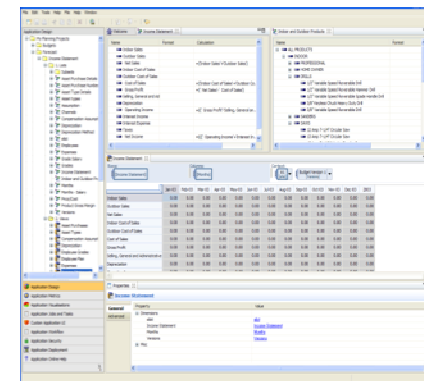
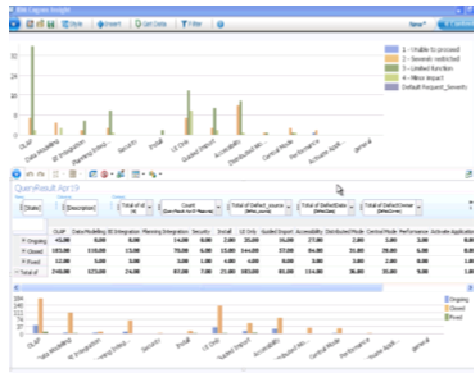
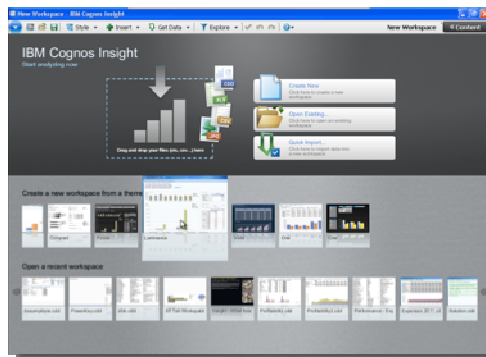


Lab Services Web Sites – find other offerings

External: <http://www-01.ibm.com/software/analytics/cognos/services/>

Summary: New Innovations for Planning, Analysis & Forecasting

- Improved, flexible solution design environment
- Easily spans analytics and planning requirements
- Unrivalled performance at high user and data scale
- Breakthrough user experience and analytic agility



Only IBM: Powers Performance Management Transformation

What used to be:

- ✗ Low frequency planning and participation
- ✗ Deteriorating relevance
- ✗ Low-value activities

Will become:

- ✓ Visibility to performance gaps, alternatives
- ✓ Reliable forecasting
- ✓ Commitment to achievable goals

Thank you!

Trademarks and notes

IBM Corporation 2012

- IBM, the IBM logo, ibm.com, Cognos, and TM1 are trademarks or registered trademarks of International Business Machines Corporation in the United States, other countries, or both. If these and other IBM trademarked terms are marked on their first occurrence in this information with the appropriate symbol (® or ™), these symbols indicate US registered or common law trademarks owned by IBM at the time this information was published. Such trademarks may also be registered or common law trademarks in other countries. A current list of IBM trademarks is available on the Web at [“Copyright and trademark information”](http://www.ibm.com/legal/copytrade.shtml) at www.ibm.com/legal/copytrade.shtml.
- Microsoft is a trademark of Microsoft Corporation in the United States, other countries, or both.
- Other company, product, and service names may be trademarks or service marks of others.
- References in this publication to IBM products or services do not imply that IBM intends to make them available in all countries in which IBM operates.

