IBM Software

InformationOnDemand**2010**
ComesToYou

Unlock the True Value of Your Information

Building a FPM Competency Centre at Bupa

Andrea Wilson – CPM Manager, Bupa

Graham Cobb – Senior Manager, IBM

Agenda

- Bupa Overview
- Recognising The Problem
- The Need For A Competency Centre
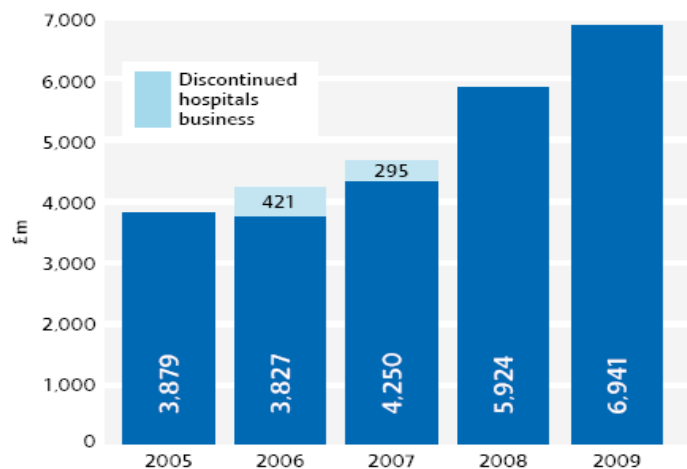- Competency Centre Journey
- Questions

Bupa Overview

Andrea Wilson

Historical Group Revenues

Bupa

Our Group

Founded in 1947, our core purpose is to help our customers lead **longer**, **healthier**, **happier lives**.

Customers are at the heart of everything we do. With **no shareholders**, we reinvest our surplus money to provide increasing numbers of people around the world with choice and control over their healthcare.

Bupa has transformed. We have moved from being a UK hospitals operator and health insurance provider to an international healthcare group providing workplace health products, health assessments, chronic disease management services, home and hospital care and care homes, in addition to maintaining our leadership in the health insurance sector.

Today, we have **over 10 million customers** in more than **190 countries** and over half our annual revenues come from outside the UK. We employ nearly **52,000 people** around the world.

2009 Results

UK and North America	Europe, Middle East, Africa and Latin America	Asia Pacific	Care Services
£2,131m Revenues	£1,760m Revenues	£2,123m Revenues	£926m Revenues
31% Contribution to Group Revenues	25% Contribution to Group Revenues	31% Contribution to Group Revenues	13% Contribution to Group Revenues
£16.8m Surplus	£157.7m Surplus	£99.6m Surplus	£133.7m Surplus

FPM Utilisation

Financial Performance Management	UK and North America			Europe, Middle East, Africa and Latin America					
	UKM	Wellness	Health Dialog	Group	Group IS	UK	CPH	Sanitas	Miami
Overheads / CC Planning incl Recharges	Cognos 8.4	*Proposed*		Cognos 8.4	Cognos 8.4	Cognos 8.4	Cognos 8.4	Cognos 8.1	
IS Project Costing and Pipeline Planning	Cognos 8.4	Cognos 8.4		Cognos 8.4	Cognos 8.4	Cognos 8.4			
Management Reporting incl Exec Pack	Cognos 8.4	Cognos 8.4		*Potential*	Cognos 8.4	Cognos 8.4	Cognos 8.4		
Balance Sheet & Cashflow	Cognos 8.4	Cognos 8.4		*Potential*	*Proposed*	*Proposed*	*Proposed*		

FPM Growth 2007 - 2010
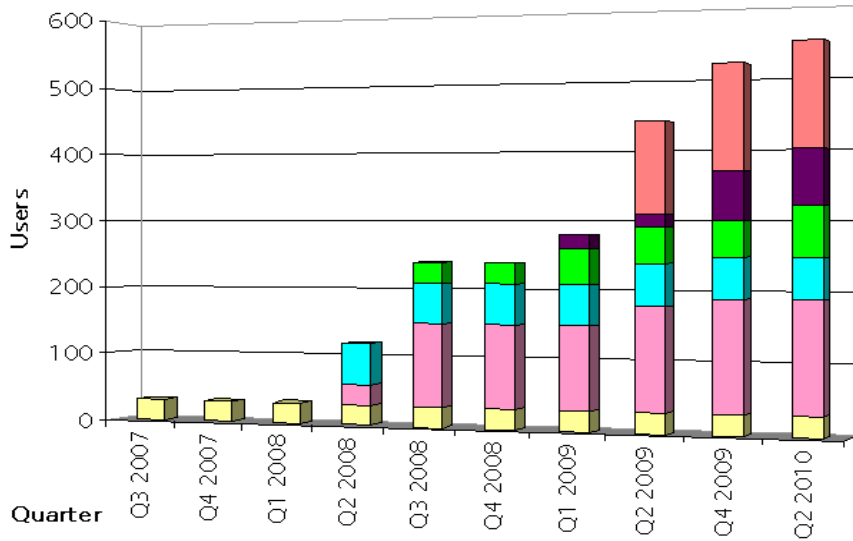
- Planning / BI Users 30 to 400
- 13 Live Planning Applications
- Controller 150 users worldwide
- Software
  - Controller 8.3 (2.3)
  - Planning &BI 8.4   (8.1)
  - TM1 9.4

Recognising the Problem

Andrea Wilson

2006

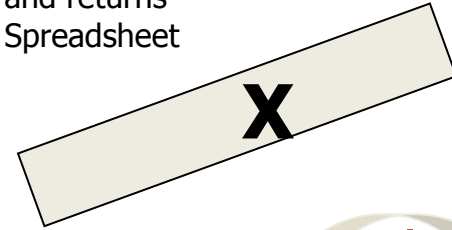- Consolidation
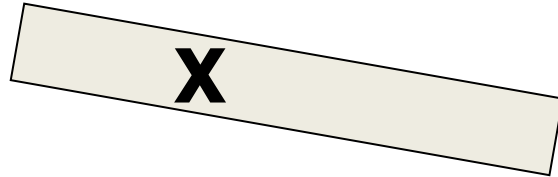 - Frango / Controller 2.3

- Planning
  - Excel / Access

"Old World"

1. Spreadsheet created and issued
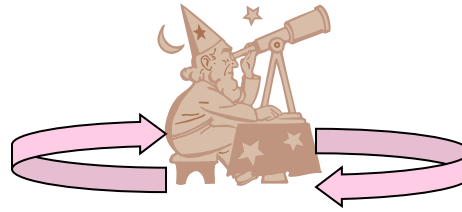
2. CC Manager Updates plan and returns Spreadsheet

The "Financial" Black Box

- Consolidation
- Analysis
- Report Creation

3. Meetings with ISET / CC Managers to discuss and amend Plans → Update spreadsheets

4. Issue to HoIT.
5. Meet with BU's to discuss, agree or amend → Update spreadsheets

"New World"

1. Spreadsheet created and issued

2. CC Manager Updates plan and returns Spreadsheet

X

X

The "Financial" Black Box

3. Meetings with ISET / CC Managers to discuss and amend Plans → Update spreadsheets

- Consolidation
- Analysis
- Report Creation

X

X
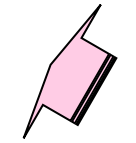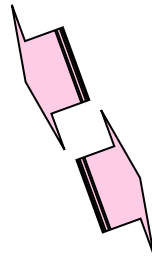
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5. Meet with BU's to discuss, agree or amend → Update spreadsheets

"New World"

1. Spreadsheet created and issued

2. CC Manager Updates plan and returns Spreadsheet

OPEN UP

THE BLACK BOX

- Central database
- Planning workflow
- Dashboards
- Reports

- Consolidation
- Analysis
- Report Creation

3. Meetings with ISET / CC Managers to discuss and amend Plans → Update spreadsheets

4. Issue to HoIT.
5. Meet with BU's to discuss, agree or amend → Update spreadsheets

- Collaboration
- Visibility
- Transparency
- Continuous update and review

2007

- Planning
  - Vendor Selection
  - Business Case
  - GTIS

Performance Management Journey

AUTOMATION ---------------------------------- TRANSFORMATION ----------------------------

| 1 | ADDRESS Initial Needs | 2 | DRIVE Best Practices | 3 | EXTEND Enterprise-Wide | 4 | ADVANCE Performance Management |

**Embrace and Extend Our Existing Infrastructure**

How?

Who can help?

The Need For a Competency Centre

Graham Cobb

What are Competency Centres?

- A formal structure of people within an organization with common interests
- Business users, from multiple functions, working in partnership with IT, forming a fixed team or virtual "community"
- Leveraging best practices and domain knowledge for sharing, transferring, and broadening skills
- Employing a consistent set of standards and processes
- Managed or coordinated with a governance structure to make binding decisions and consensus recommendations

People

Process

Technology
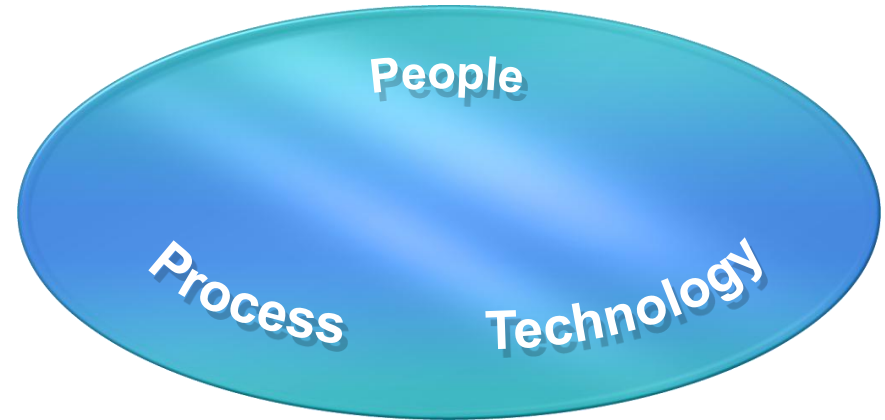
- *Is persistent over time*
- *Spreads benefits over multiple projects, regions, departments, divisions*

Benefits of a Competency Centre

– Eliminate the gap between Business and IT (Communication & Time to market)

– Maximise efficiency, through re-use of processes and technology in delivering quality solutions across all lines of business

– Have deployments that have higher success and deliver more value, at less cost, and in less time as the capability increases

– Drive end user adoption to ensure success

– Enable a balance of agility and management of technology which is needed to drive business efficiency through a recognised capability

Functions of a BICC
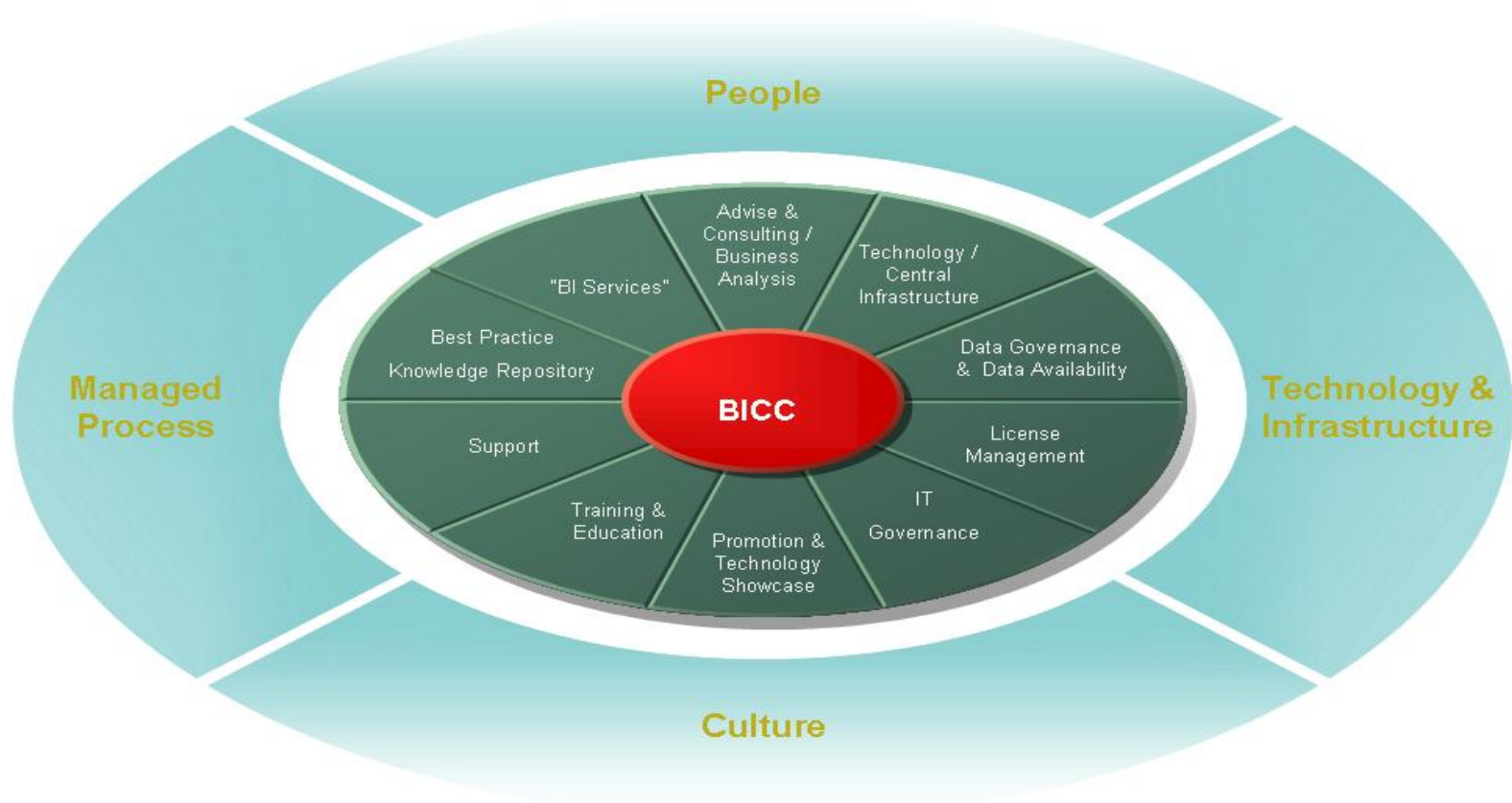
Competency Centre Journey

- Began March 2008
  - Discovery Workshops
    - What is a Competency Centre?
    - Agree scope, structure, responsibilities and priorities
- Set up the Governance Framework
- Charter
- Maturity Assessment
- Establishment
- Workstreams
  - Best Practice
  - SLA
  - Prioritisation
  - Etc.
- Future Sessions
  - SWOT Analysis
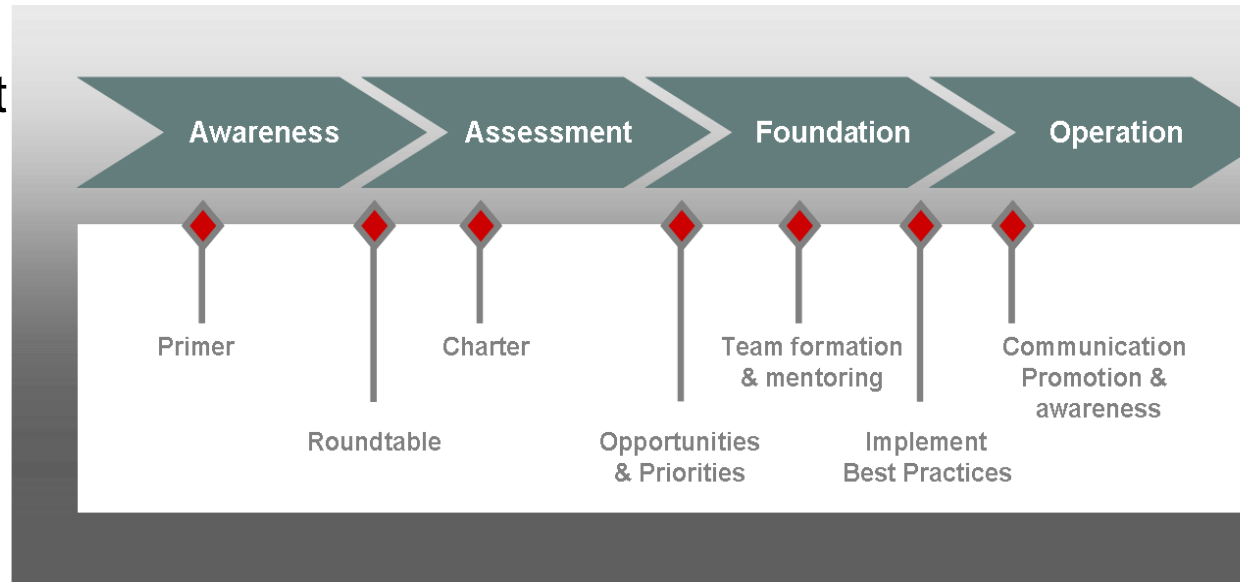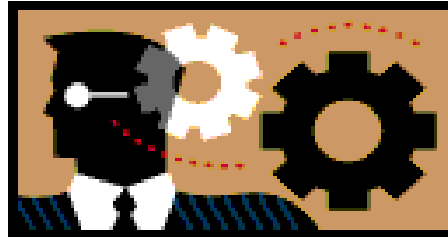
FPM Competency Centre - Goal

To design, build and implement a Centre of Excellence (CoE) in support of the Financial Planning process and ongoing Financial Performance Management for Bupa that enables the delivery of consistent services and user experience across the Bupa Business Units including IT.
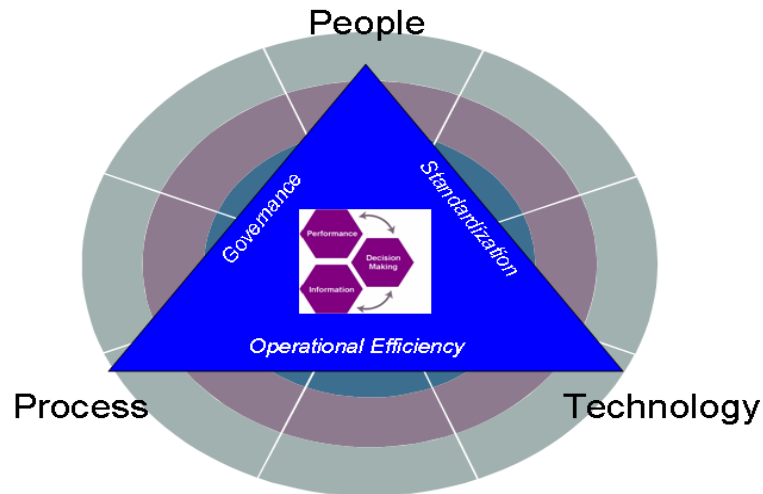
The CoGG

COGNOS
Financial Performance Management

Connecting **Business & IT**

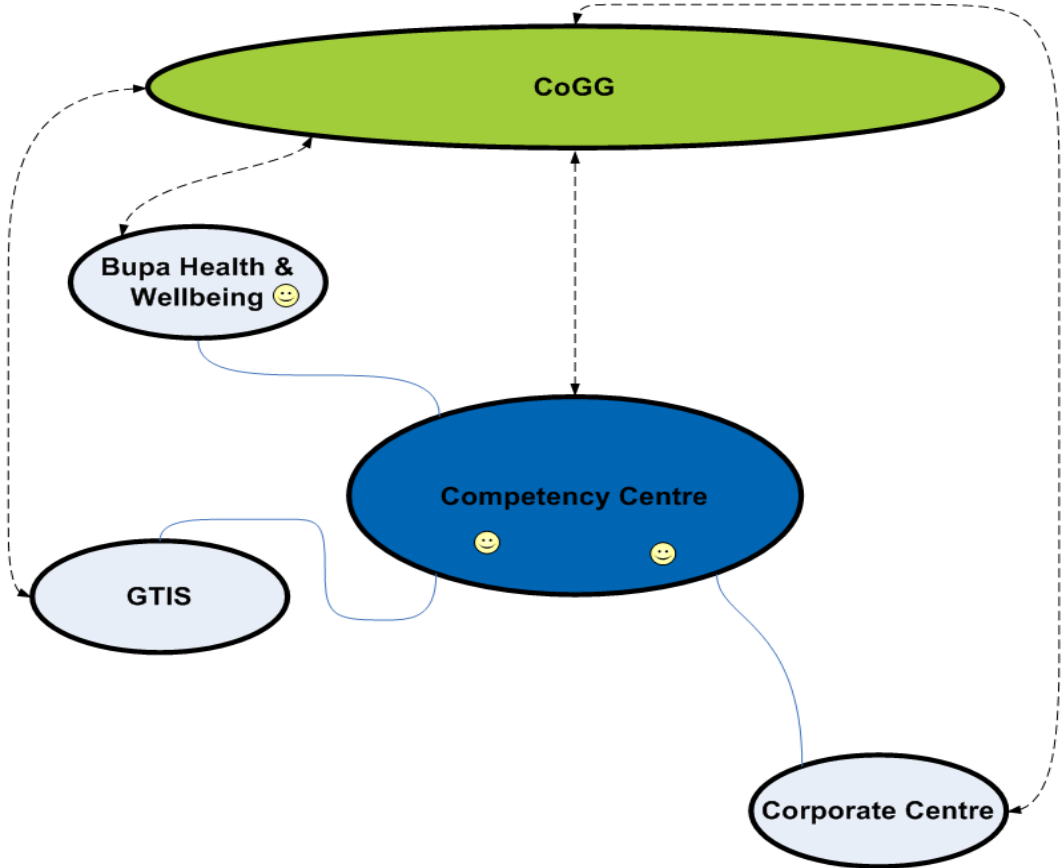**Centre of Excellence**

Competency Centre Journey

Andrea Wilson

The CoGG

- Charter and ToR
  - Q2 2008
- Business Representatives
- Quarterly Meetings
  - Process Reviews
  - Demo's
  - Pipeline of Work
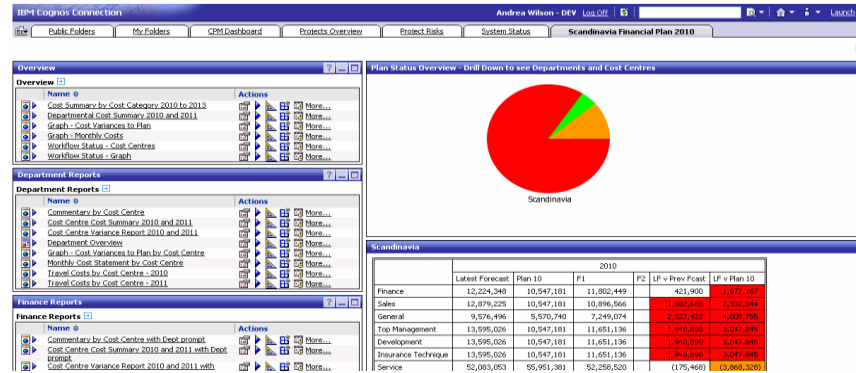 - Costs & Recharges
  - Metrics
  - SLA's

People
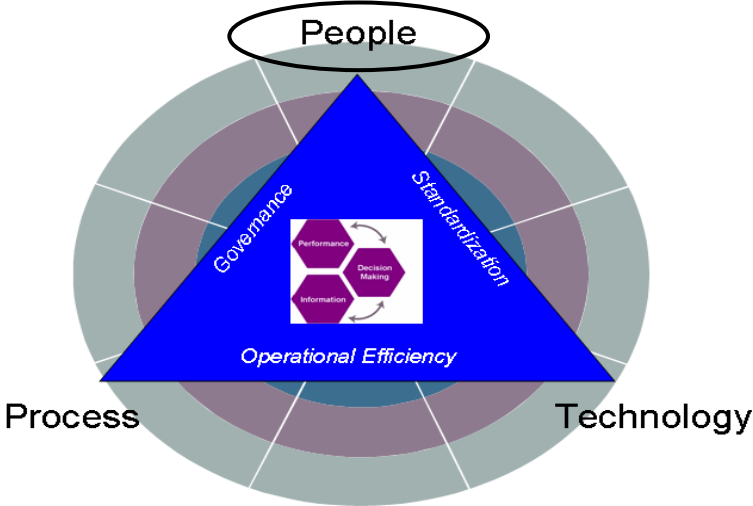
Structure and Governance - 2007

2008

- Corporate Centre

- Bupa Health and Wellbeing

- Project Costing
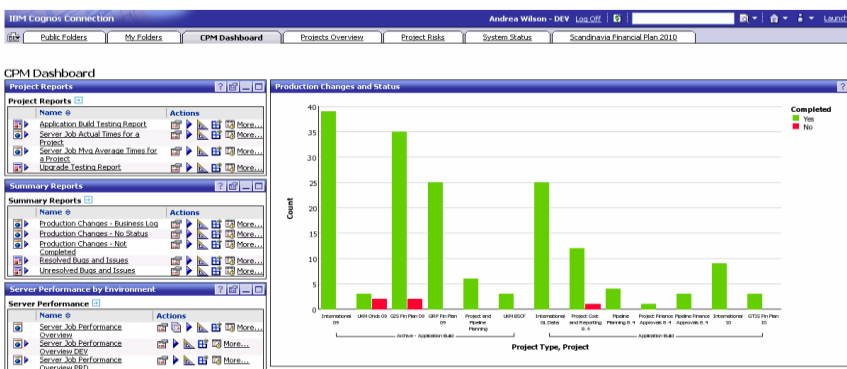
- Project Pipeline Planning

- Infrastructure Growth

2009 - 2010

- Controller 8.3
- International Businesses
- Balance Sheet & Cashflow
- Project Reporting
- TM1

Structure and Governance - 2010

People

SPECIALISM
•Finance
•BI Reporting
•Planning
•TM1
•FM Modelling
•Technical

BU ADMINISTRATOR
Planning / BI
•Design
•Build
•Test
•Run

TECHNICAL SUPPORT
•Run The Service
•Service Desk Calls
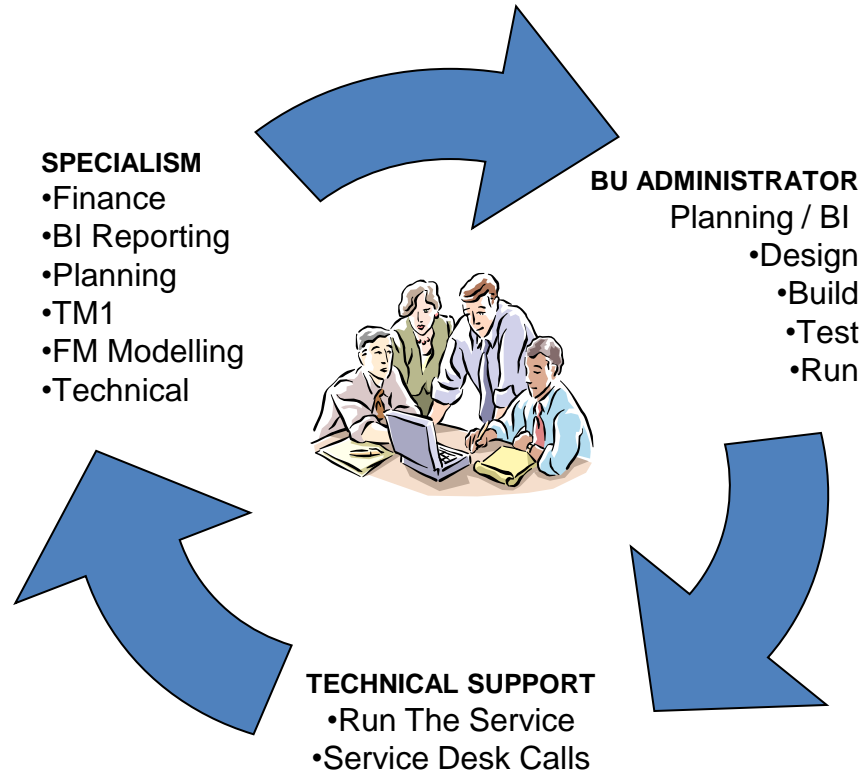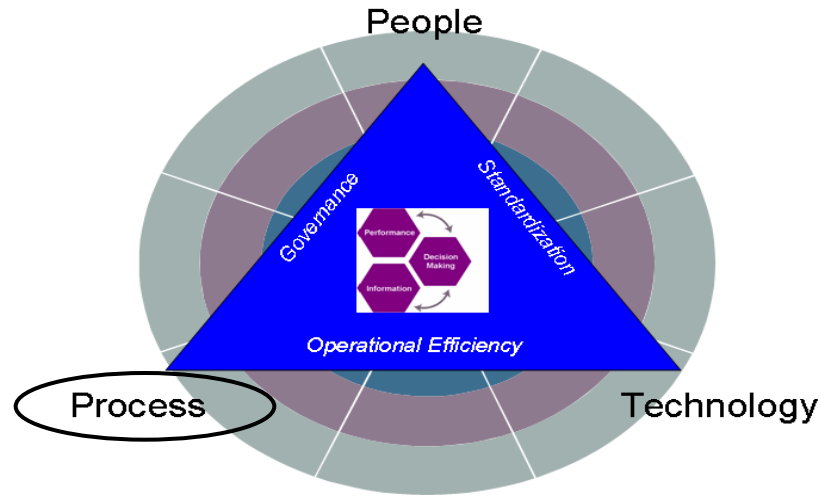
Process

Processes
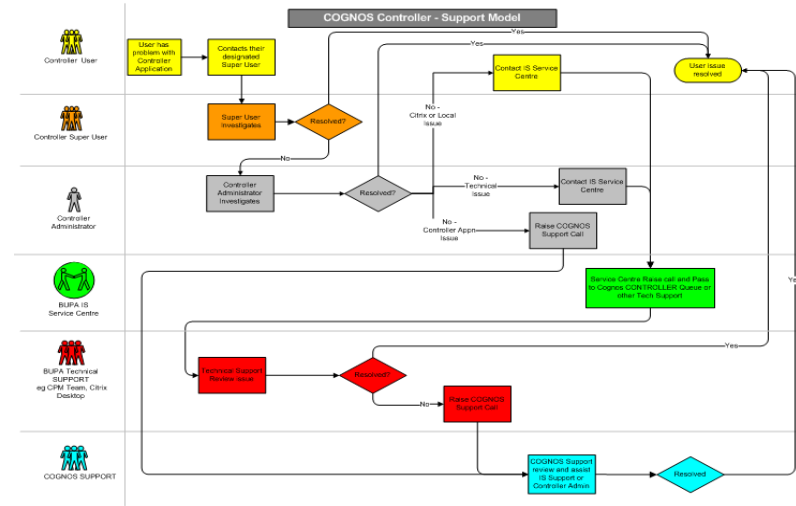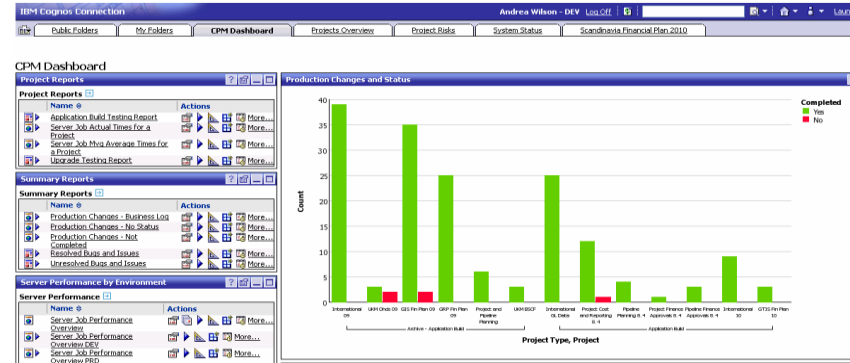

- BUILD
  - Cognos SIM
  - Quality Gates
    - Prototype / Test / Sign Off
    - Build / Test
    - Reporting / Test / Sign Off
  - IT Change Control
- SUPPORT
  - Application SLA's
  - Service Desk
  - IT Change Control
  - Cognos

Technology
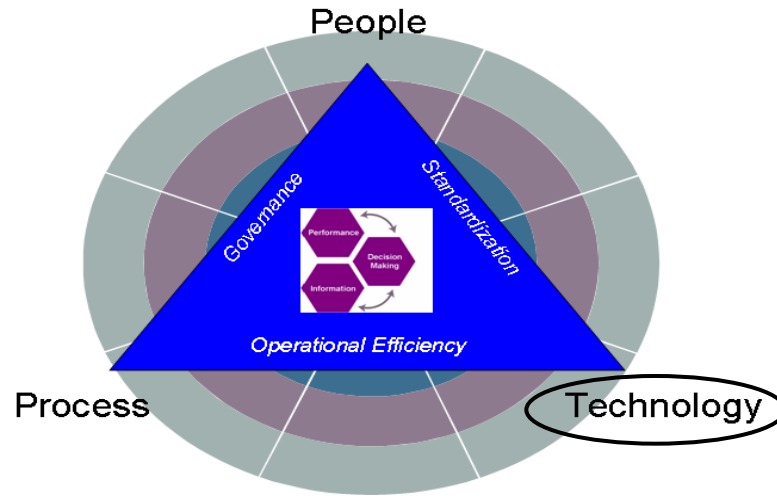
Technology

- Dedicated Infrastructure
  - Web gateways / Citrix
  - Application Tier
  - SQL Databases
- Roadmaps
- Upgrades
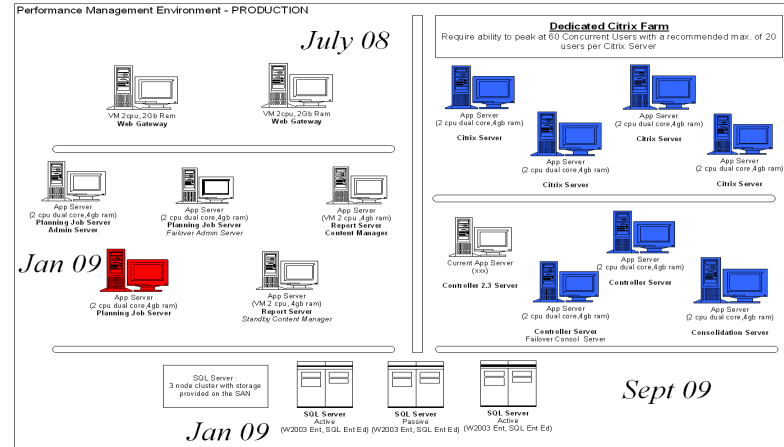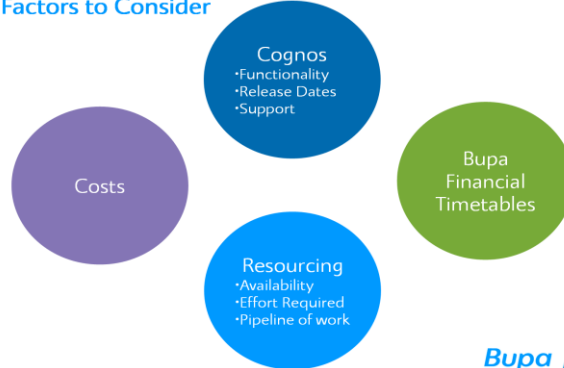
The Good … and the Bad

- Slow Start
- Centralised
- CoGG set up early in the journey
- Cross BU ownership and prioritisation
- Learn from and support one another
- Share Best Practice
- Raise the bar year on year
- In House Expertise
- IT Support

- Slow Start
- Conflicting priorities / timings
- High level sponsorship

Benefits of a Competency Centre

- – Eliminate the gap between Business and IT (Communication & Time to market)

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What do our Customers say ?

Projects:
"Really excited this will be a significant game changer"
"Brilliant …never realised Cognos was this far forward"

The CoGG is a great way for everyone to learn from other BU's about their planning processes and share finance related issues

Cost Centre Planning:
"Increased speed 12-15 hrs saved per iteration for one BU"
"Finance roles more interesting and value add"
"Greater confidence in the no's"
"Capability to analyse and interrogate the data"

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