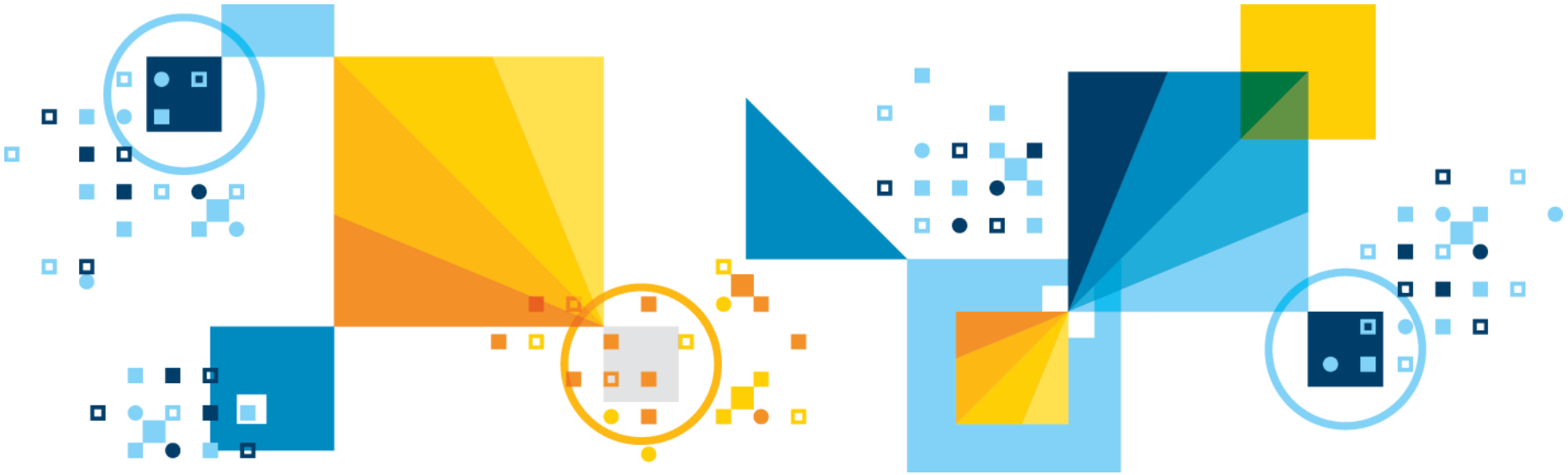
Georgi Ganev, Analytics Leader IBM Bulgaria

IBM Planning Analytics Overview



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Planning Analytics Overview

- **As of December 2016 and moving forward, TM1 is now known as *Planning Analytics***

- **It remains IBM's offering in the Strategic Corporate Performance Management space as a tool that allows you to create *plans (e.g. budgets/forecasts)***

- **History of TM1 (Table Manager 1)**
  - Created in the mid 80s, originally marketed by Sinper corporation
  - October of 1996 it was bought by Applix
  - In 2007, TM1 became a Cognos product through the acquisition of Applix
  - In 2008, TM1 became an IBM product through the acquisition of Cognos
  - In Q4 2015, the cloud version of TM1 was renamed Planning Analytics (the on-prem version remained TM1)
  - In Q4 2016, the on-prem version of TM1 was renamed to Planning Analytics *Local*

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IBM Planning Analytics in a nutshell

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Three Broad Capabilities of Planning Analytics

Planning Analytics helps organizations plan smarter by improving

High performance in-memory engine, intuitive and familiar interfaces

Discover drivers and trends, model scenarios

Adapt quickly to changing business conditions

Overview of Planning Analytics: https://www.youtube.com/watch?v=SFcBe_fK_-s

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Speed - IBM Planning Analytics

Key Message	KEY CAPABILITIES
	• Planning & Analytics Workspace • Excel Integration • TM1 Engine
	• Data Discovery • Advanced Analysis • Internal & External Data
	• Strategy Management • Metrics and Drivers • Management Reporting

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Planning Analytics Workspace

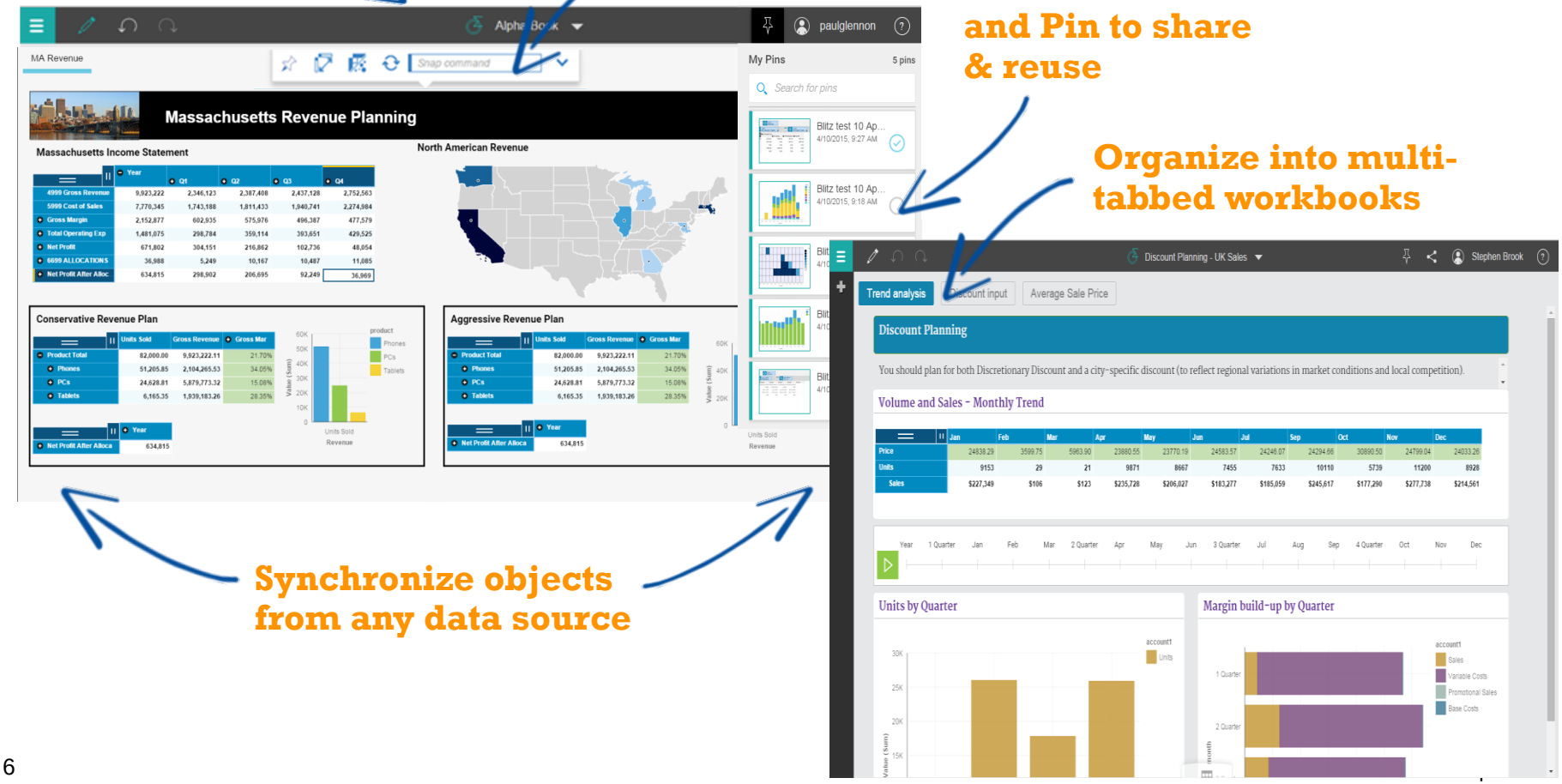
Best in Breed Planning | Easy, Intuitive, Graduated

Rich interactive workspace

Natural language discovery & manipulation

Collaboration and Pin to share & reuse

Organize into multi-tabbed workbooks



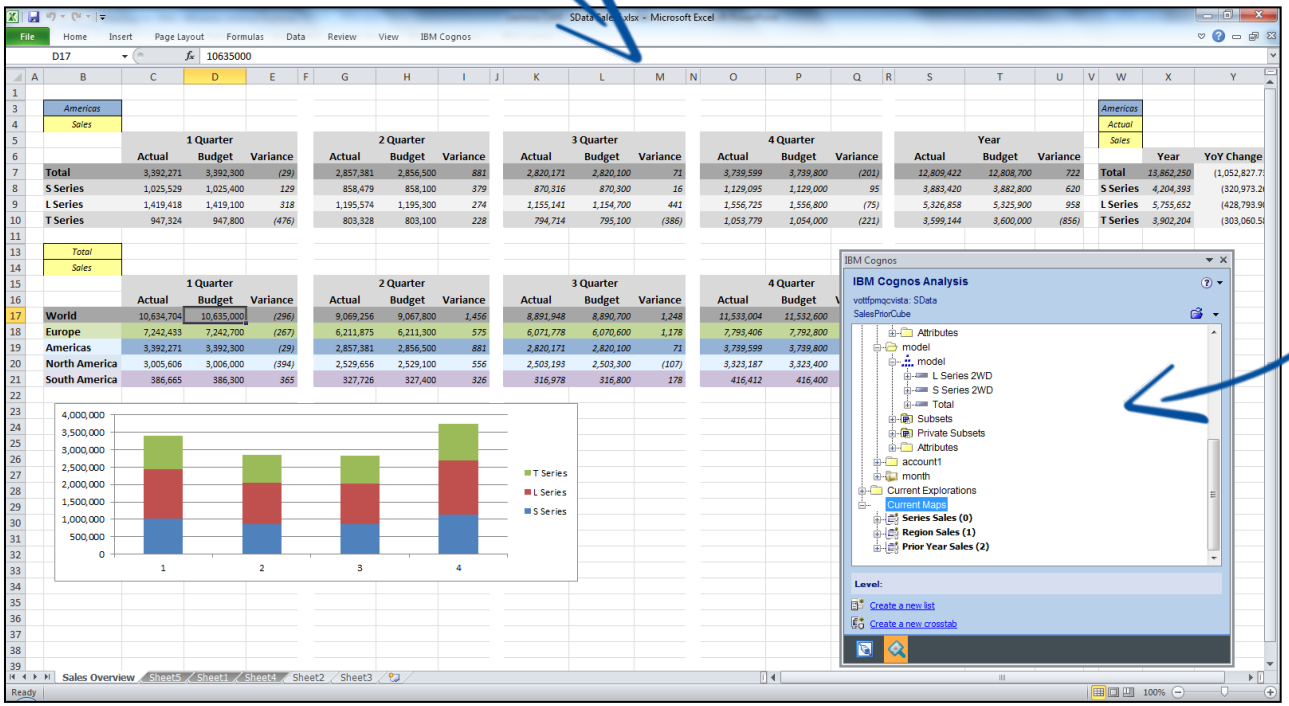
Synchronize objects from any data source

Robust Excel Integration

Embrace and Surround Excel

Excel connected to Planning Analytics Cloud

Name changed from CAFÉ to Planning Analytics for Excel or PAX



Move freely between Planning Analytics workspace and Excel

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Hi-Speed, In-Memory Engine

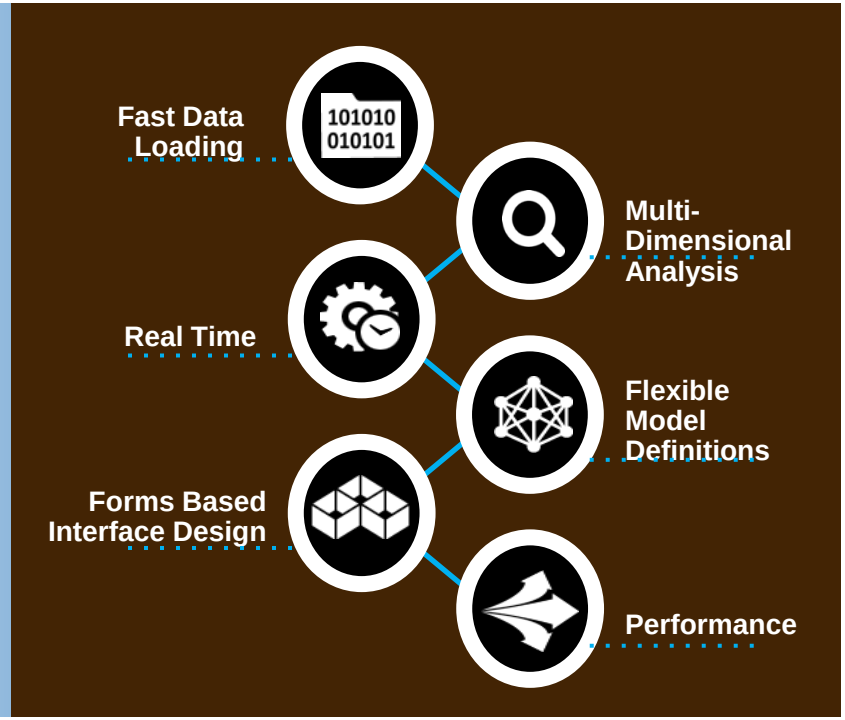
Fast, Agile, Scalable

Even faster and more powerful than before

IBM Planning Analytics is the best Performance Management solution on the market **for managing volatility,** providing **real-time** responses to complex questions.

Embracing Volatility

- High volume contribution
- What-if analysis
- Meta-data changes
- Data refresh



Speed and Agility with new Smart Cache and Anti-Lock

Additional flexibility with attribute analysis and hierarchies

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Foresight: IBM Planning Analytics

Key Message	KEY CAPABILITIES
SPEED	• Planning & Analytics Workspace • Excel Integration • TM1 Engine
FORESIGHT	• Data Discovery • Advanced Analysis • Internal & External Data
AGILITY	• Strategy Management • Metrics and Drivers • Management Reporting

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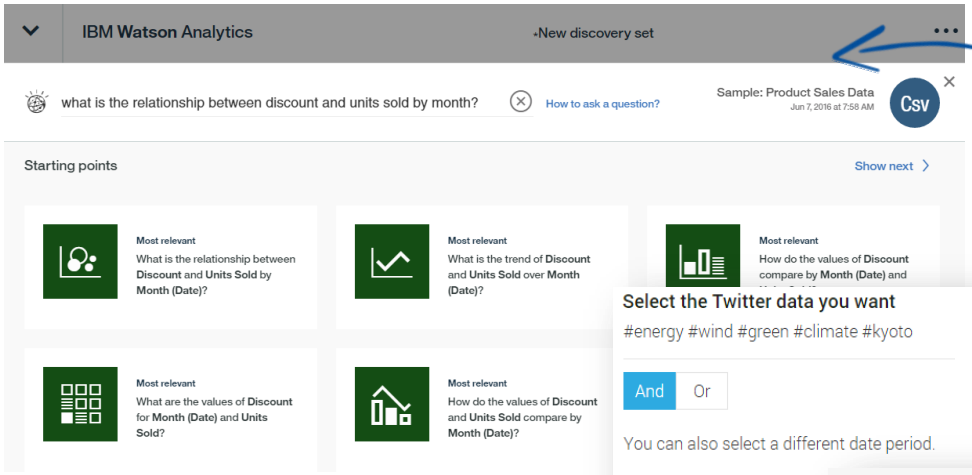
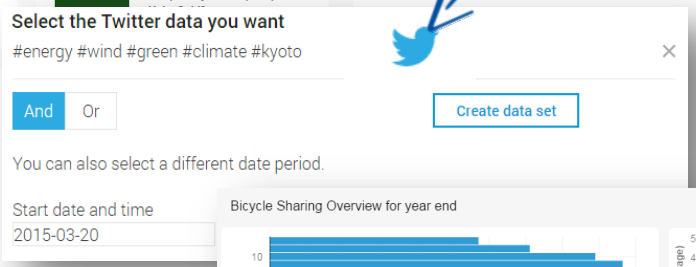
Smart Data Discovery with Watson Analytics

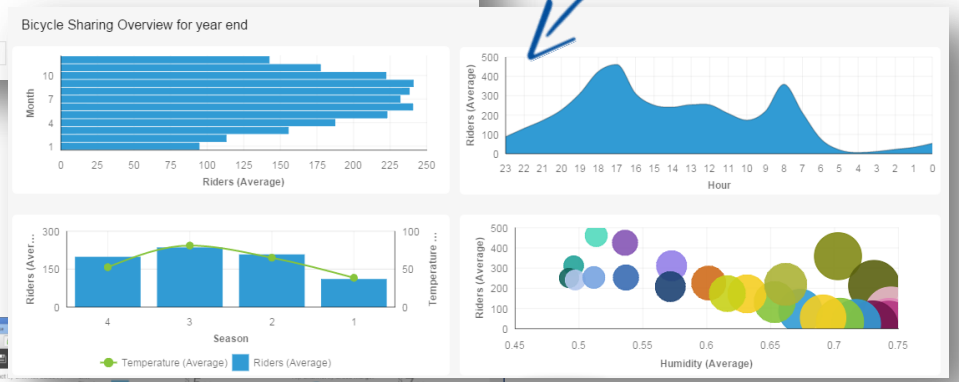


Natural language and guided discovery

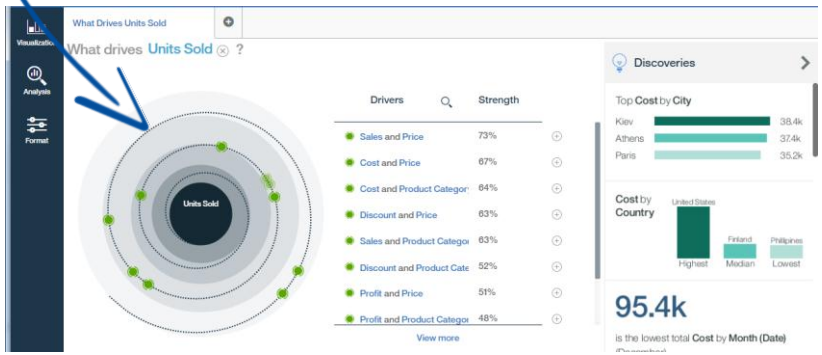
Easy access to external data

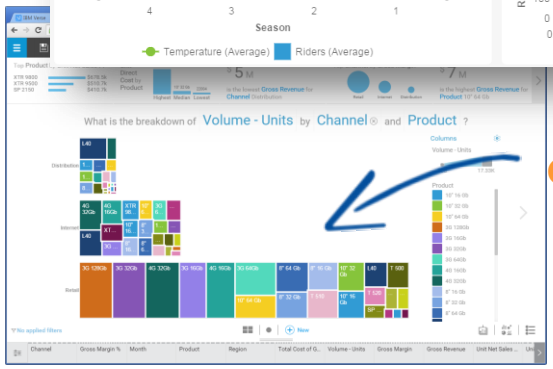


Collaborate and share Tell a story



Identify and validate performance drivers





Compelling visuals

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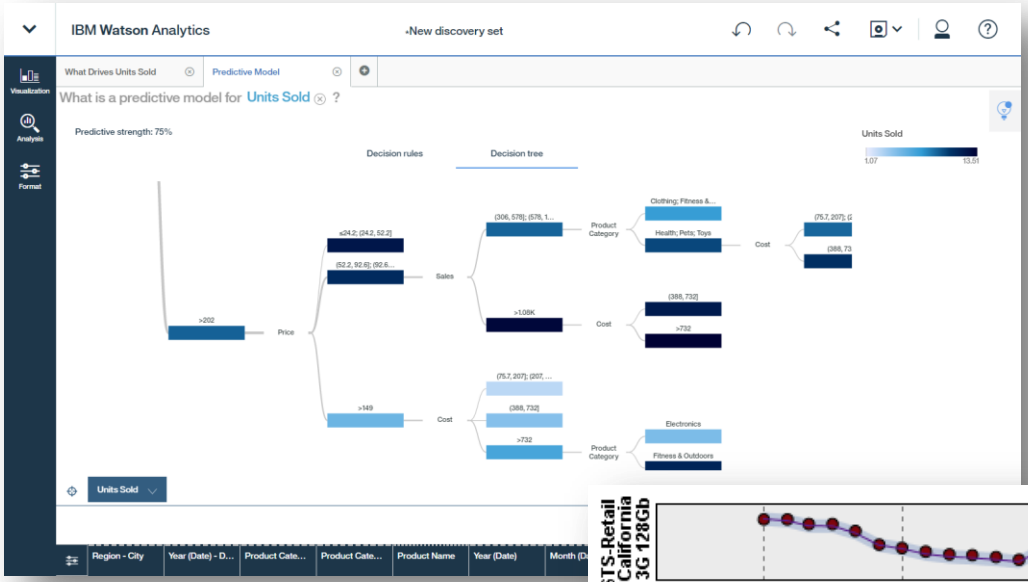
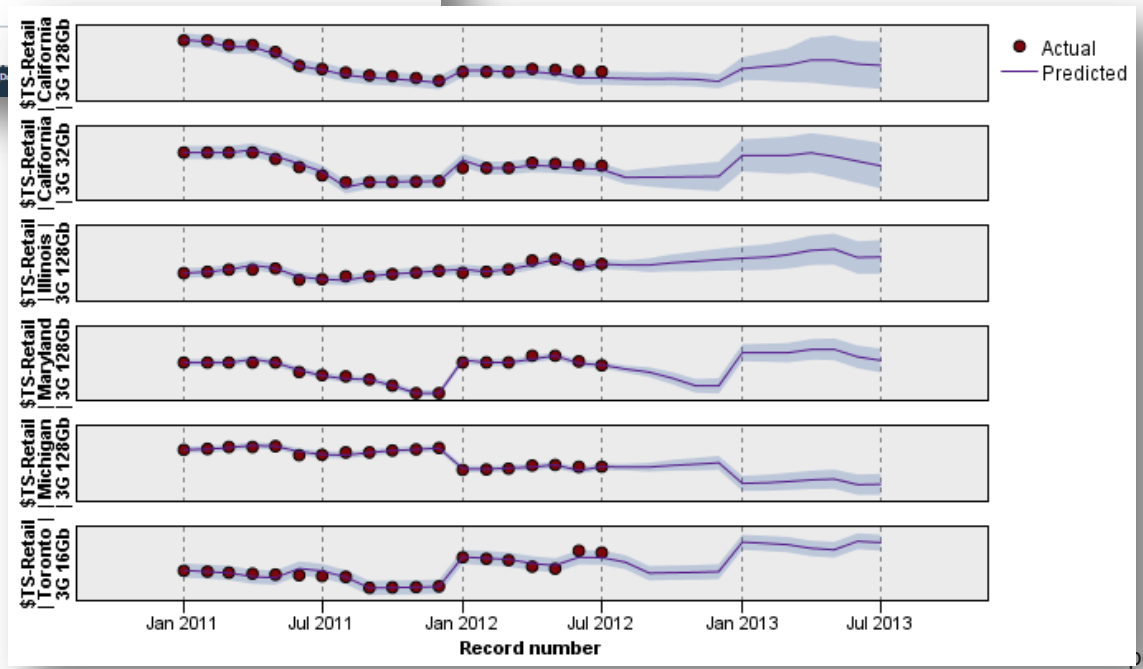
Advanced Analysis for Foresight



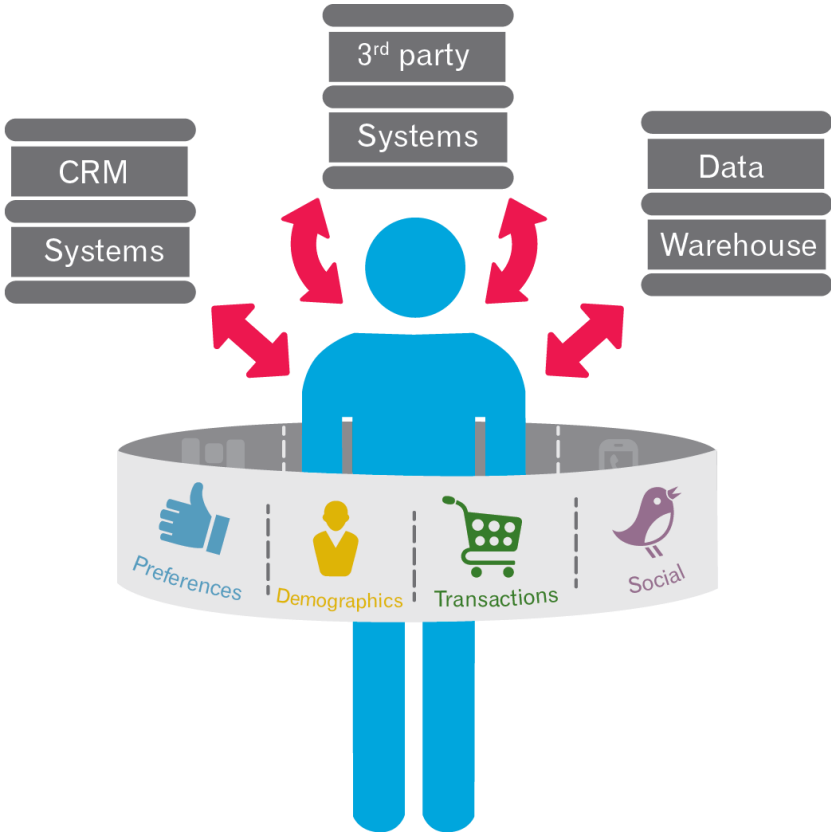
Identify patterns of variables that can explain outcomes

Generate more accurate forecasts at a more granular level



Internal and External Data

- **Easily enable secure access to data and applications across environments, whether it be from on-premises to the cloud or from one cloud to another cloud**
- **Extract data, metadata and security profiles and move them into open data warehouses and repositories for use in performance management or business intelligence (BI) applications**
- **Data synchronization, connectivity and transformation that enable you to orchestrate integration processes across multiple applications**



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Agility: IBM Planning Analytics

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	• Strategy Management • Metrics/Scorecards • Management Reporting

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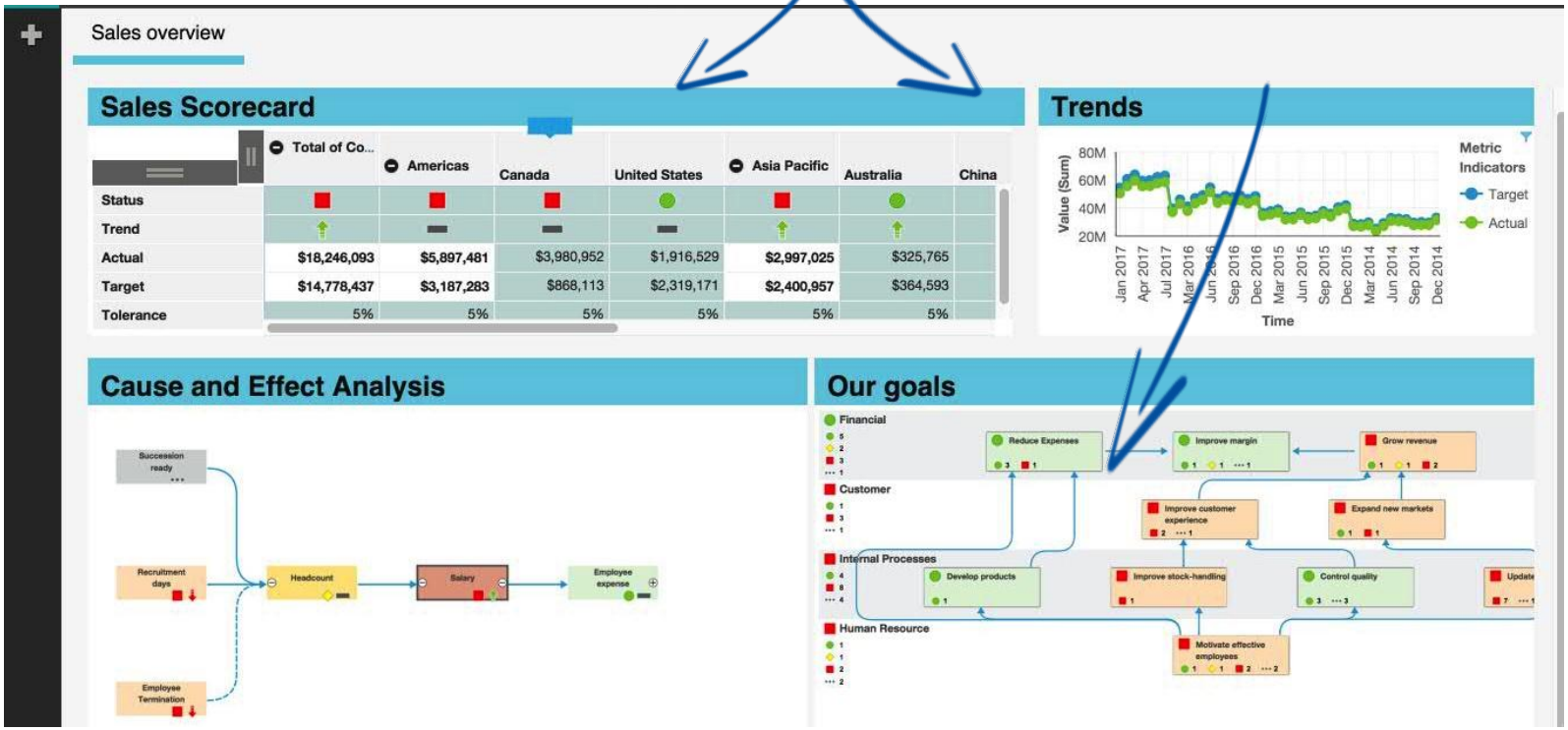
Strategy Management & Metrics/Scorecards

Alignment | Capture, communicate, monitor and assess business performance

Metrics & scorecards to monitor performance

Link strategy & execution



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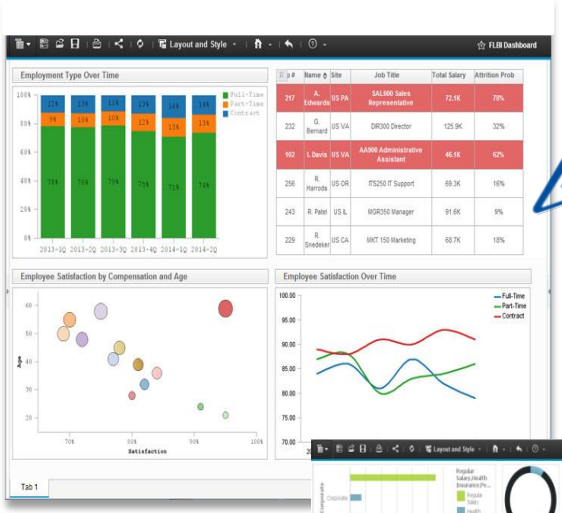
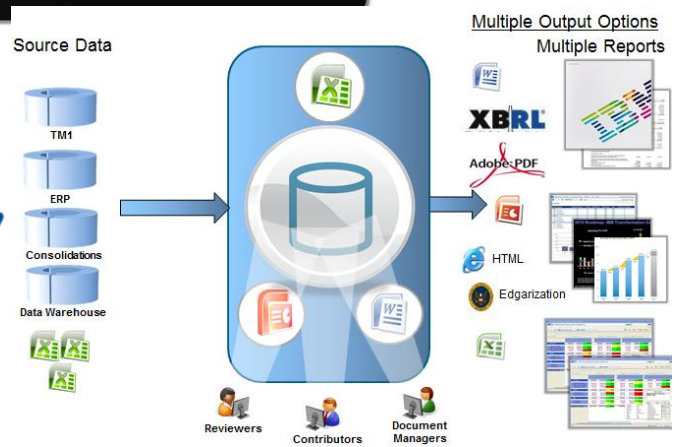
Management Reporting

Business user self-service report design, consumption & sharing



Interactive Mobile reports anytime, anywhere



Data Driven Narrative Reporting *(PA Local only – certain PIDs)*

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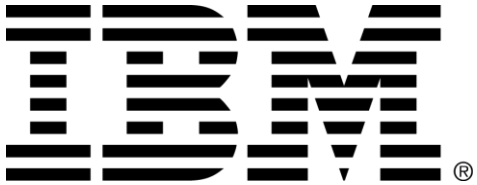
The Challenges that Planning Analytics can Address

- Spreadsheets are slow, error-prone and disconnected
- Inability to gain strong insights into drivers of revenue and profit
- Forecasts accuracy – reliance on ‘gut feel’ instead of algorithms
- Financial and operational plans are disconnected
- Planning system is unable to model rapidly changing business conditions

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