



Suncorp and SMS

Integrating TM1 and Financial Performance Analytics to deliver business value to Suncorp Finance

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Agenda

Entree

- Suncorp
- SMS
- Drivers to change

Main Course

- What we chose
- Why we chose FPA & TM1
- The approach - Agile
- What we delivered

Dessert

- Value and benefits
- Summary
- Questions

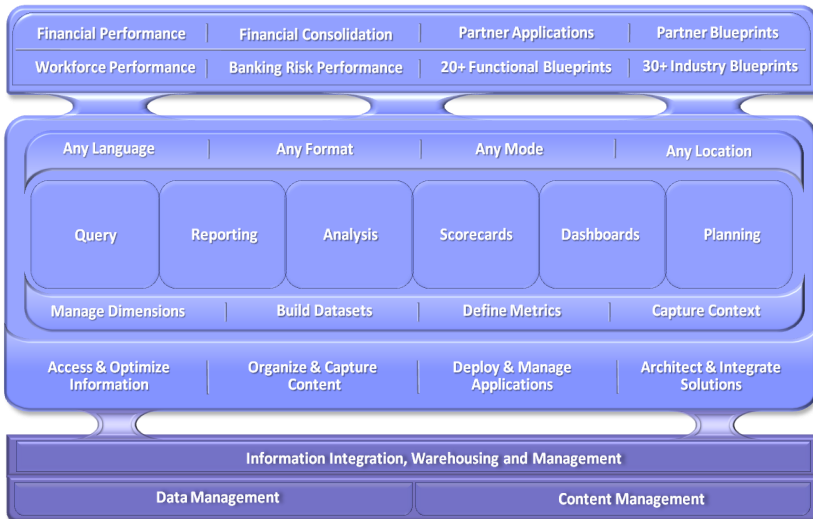




- Suncorp is a unique financial services industry leader in Australia and New Zealand. Our Group includes prominent insurance, banking, superannuation and investment product brands
- We are one of Australia's largest general insurance groups
- Suncorp is also the largest Regional Bank in Australia – and the fifth largest of all Australian Banks.
- 35% of Australians use our products and services.
- Nearly 33% of Australians are insured by the Suncorp Group.
- We are a Top 25 Australian company (by market capitalisation).
- We have around 16,000 employees in Australia and New Zealand working in over 450 locations.
- We have nearly 220,000 shareholders in Australia, New Zealand and other parts of the world.



- 26 years experience of management and technology consulting
- Experts in IBM Information Management
- Over 1500 consultants across Australia, Singapore, Hong Kong and Vietnam
- End to end information and data management capability
- Lead partner for IBM Analytic Applications
- Significant financial performance management experience
- Suncorp's strategic partner



Information & Data Management						
Governance	Data Strategy	Data Quality	Architecture	Database	Data Warehouse	Business Intelligence
Ownership	Ref. Integrity	Root Causes	Certification	Backup Strategy	Enterprise DW	Dashboard
Strategies	Data Standards	Measurement	Integration Arch.	Disaster Recovery	Data Marts	Managed Reports
Policies	Data Rules	Remediation	Data Security	Performance	Operational DS	OLAP
Culture	Tactical Plans	Reporting	Data Modelling	Configuration	ETL	Adhoc Reports
Corp. Targets	Processes		Metadata	SLA	Data Acquisition	Data Mining
Compliance	BOK			Data Migration		What if?
Roles	Education					Forecasting
Responsibilities	Ext Engagement					

Challenge & Drivers to Change

- Consolidation of financial data onto Oracle GL
- A single view of financial information across the organisation
- Challenging timescales
- Replacement of existing tactical financial reporting solution
- Future financial reporting roadmap

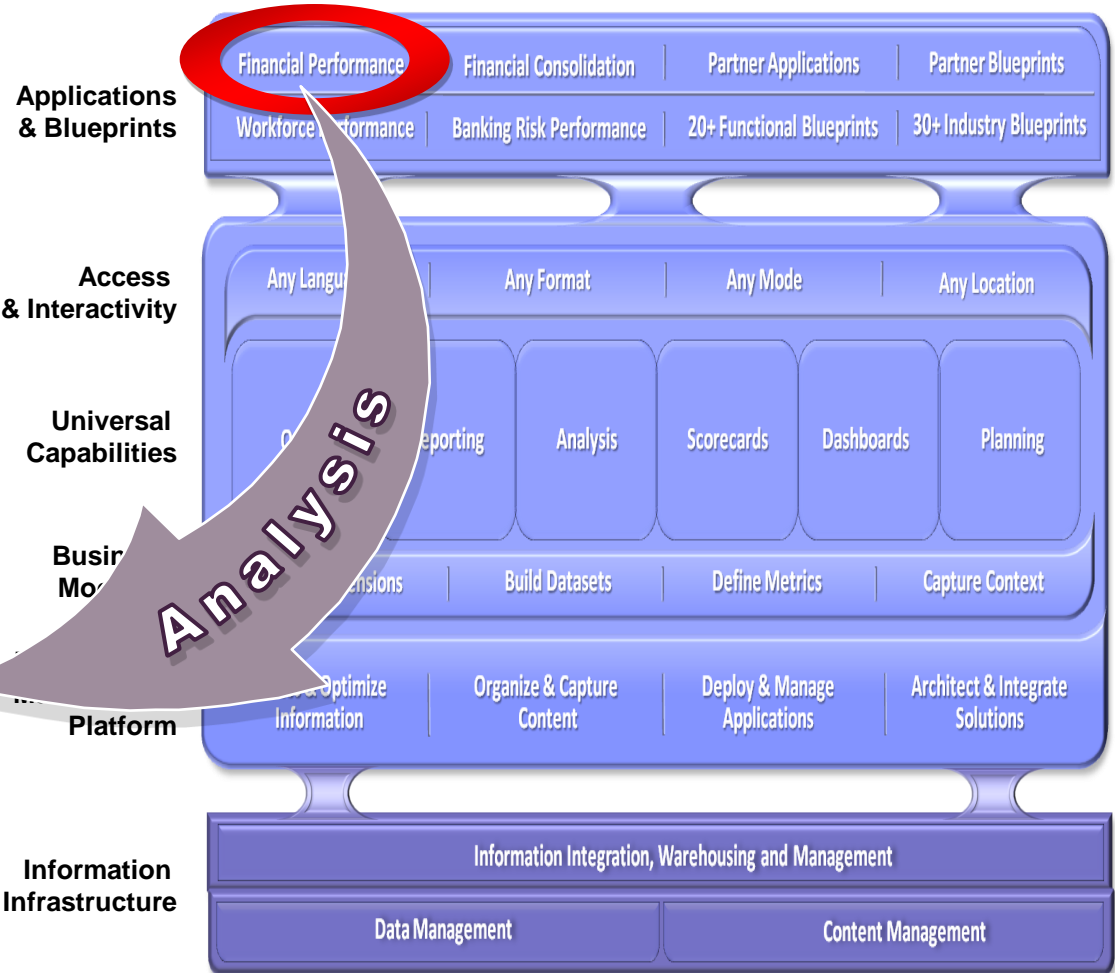
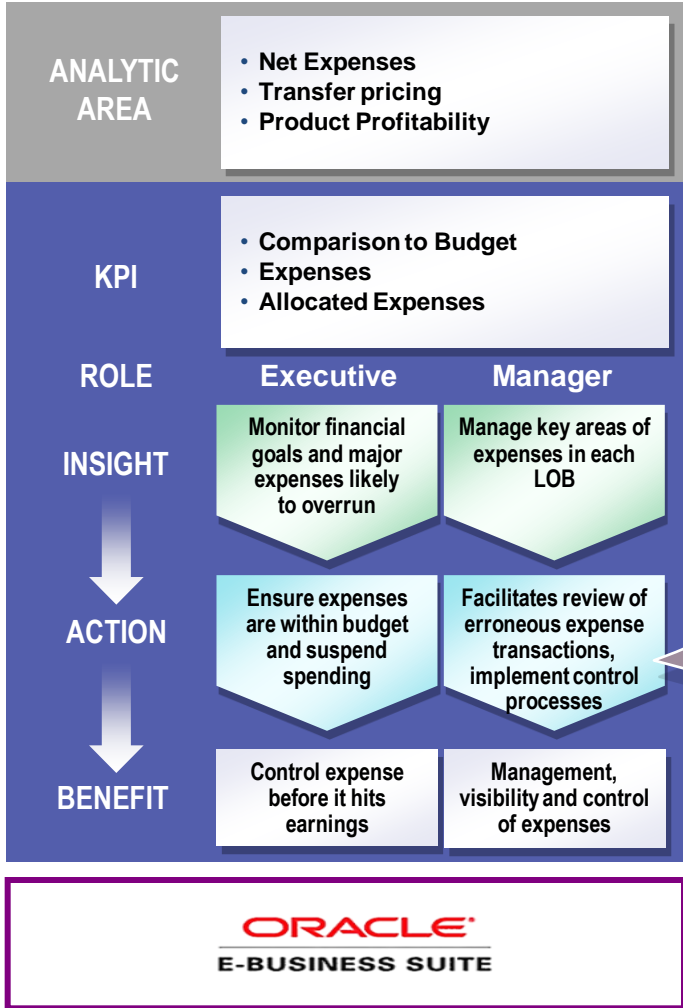
Key Requirements

- Rapid implementation to minimise risk
- Provide single consolidated source of financial data
- Extendable financial reporting for future
- Provision of flexible analytics and reporting
- Strategic architectural fit – AIX / DB2 / IBM Cognos 8
- Buy vs. build provides advantage

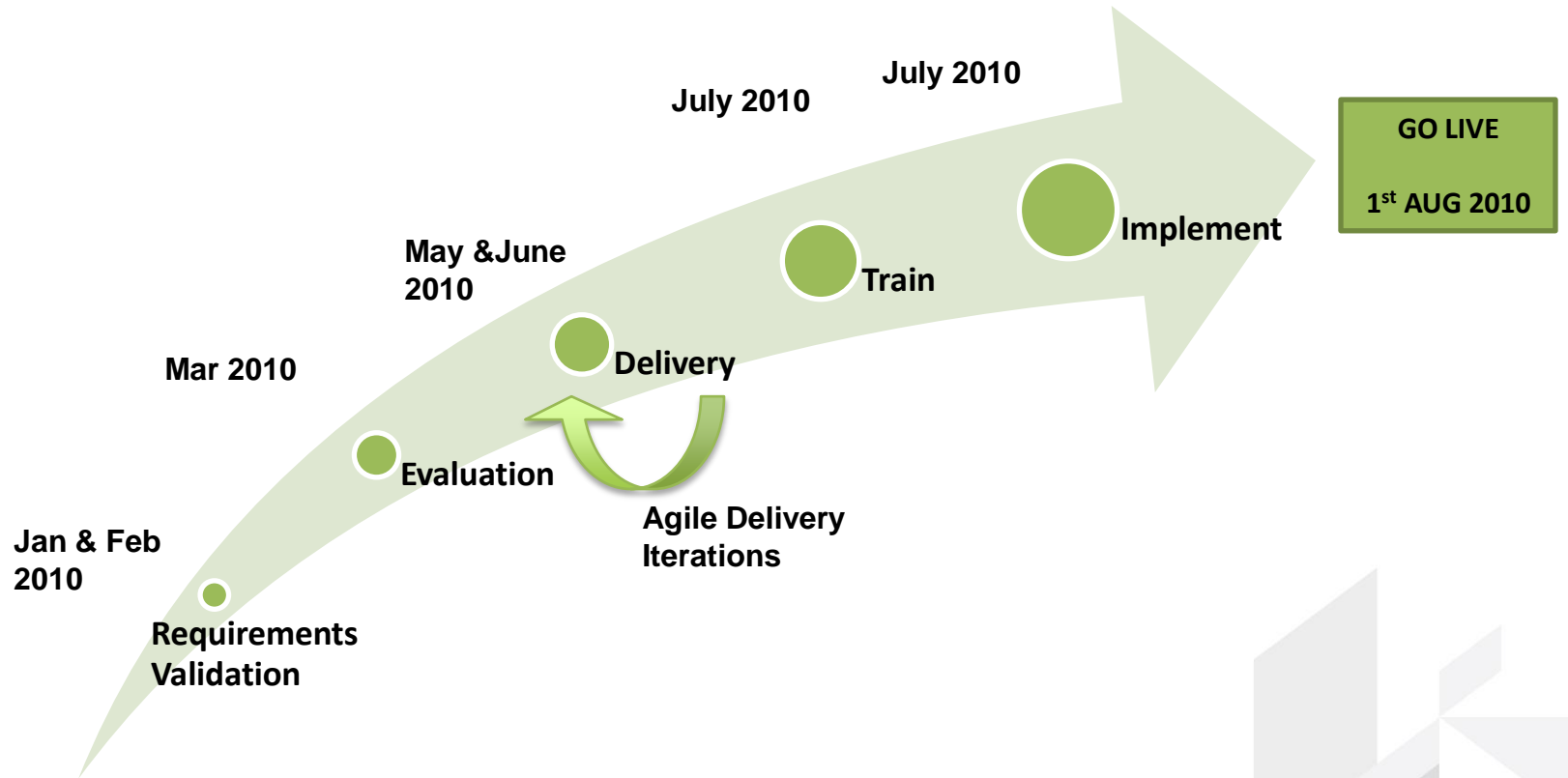


IBM Cognos 8 Financial Performance Analytics

FINANCIAL ANALYTICS



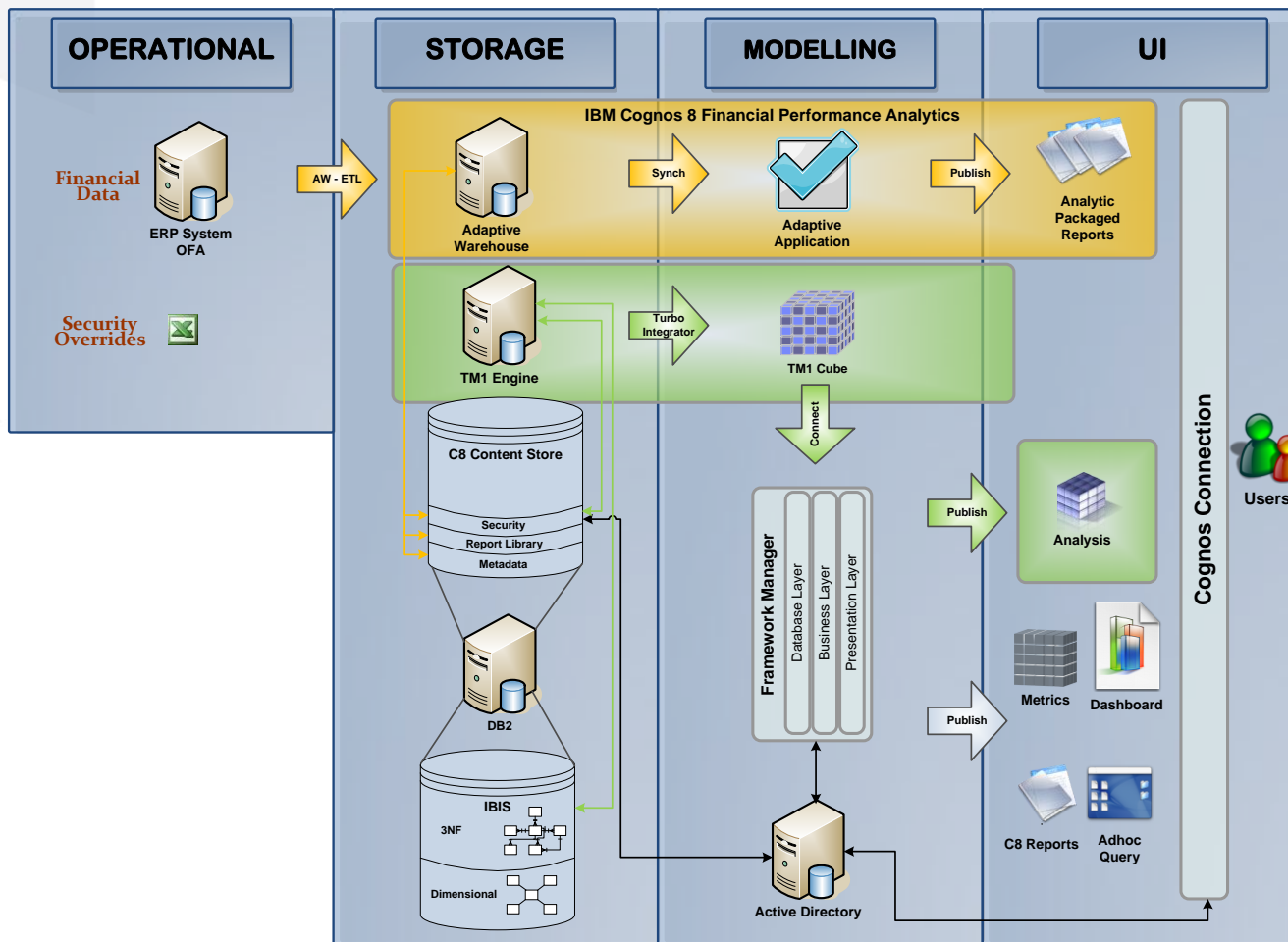
Approach



Benefits of Agile Approach

- Delivery iterations in three week blocks
- Quick wins early in the project
- Early business visibility of data for review
- Drive structure, definitions and control of key hierarchies
- Flexibility to incorporate additional priorities as they arise
- Review and improve testing cycles
- Validation of technical environments

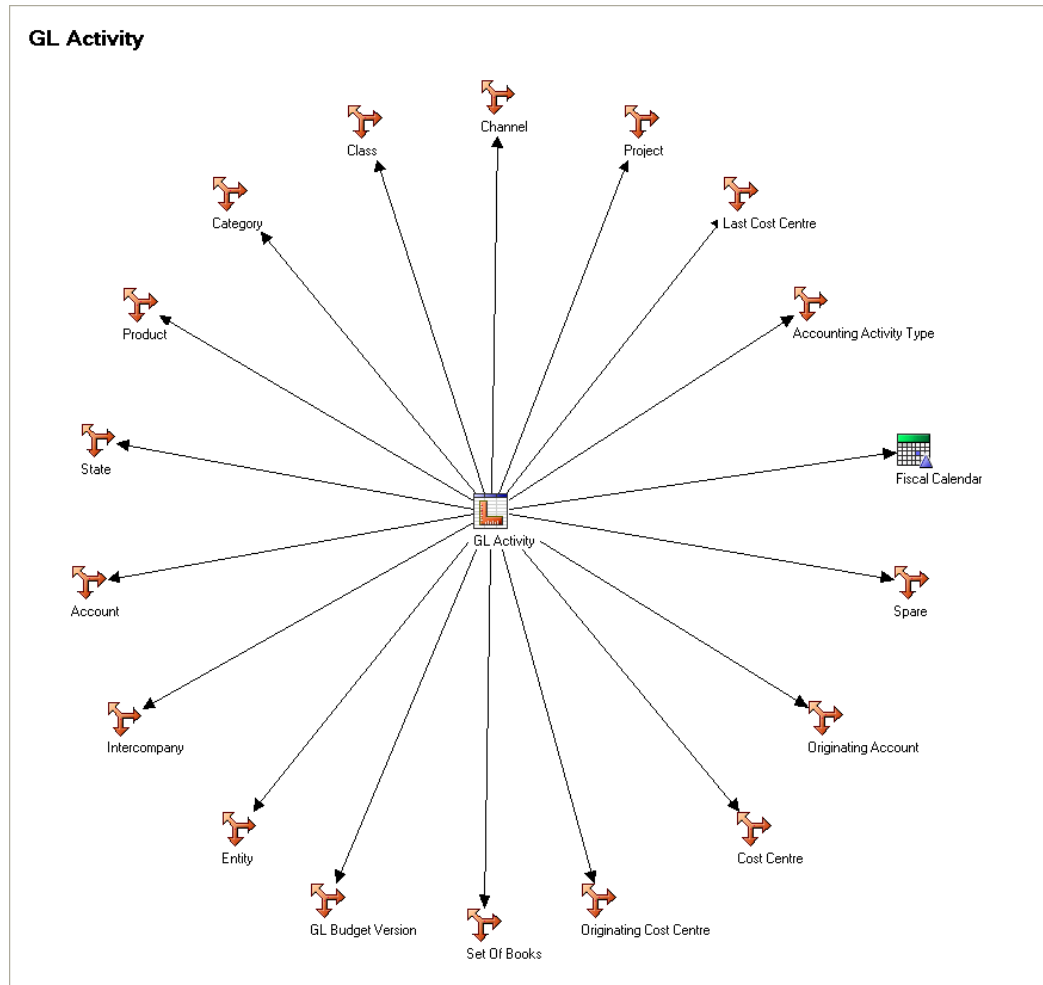
Solution Overview



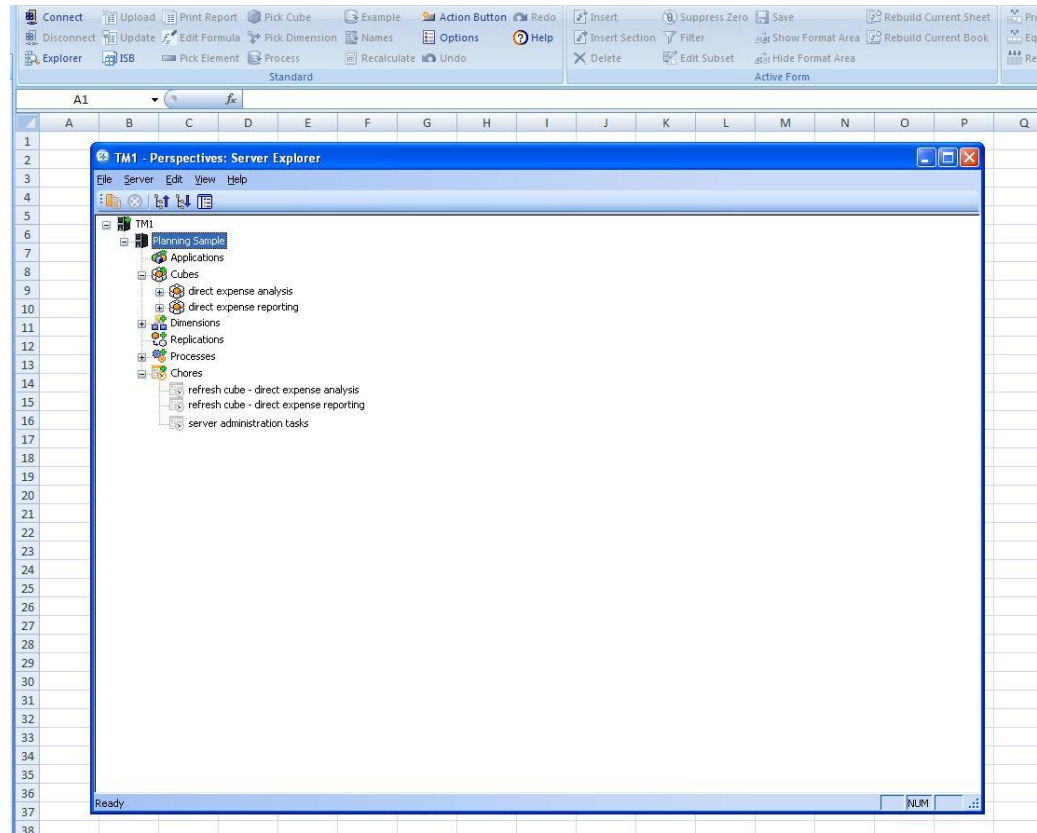
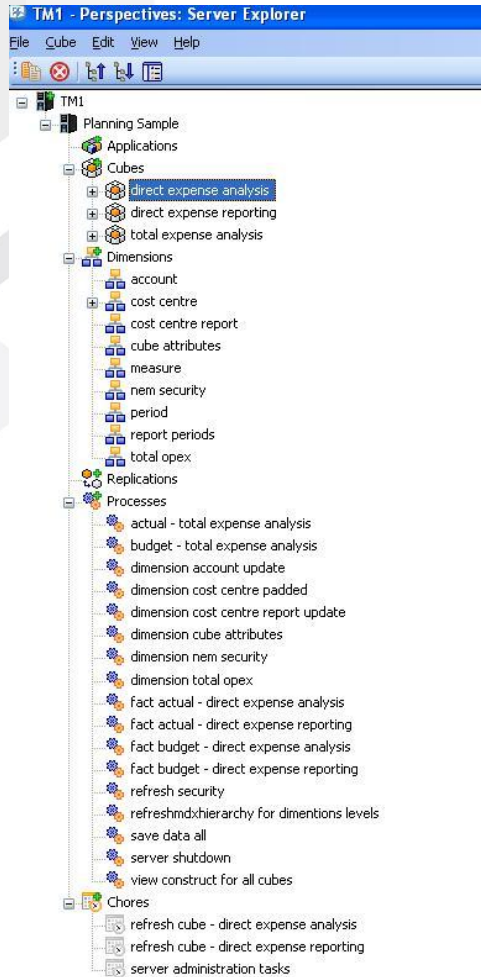
Solution Deliverables

- Financial Data Warehouse & “ETL”
- Reporting for Net Expenses (approx 1000 users)
- Adhoc Query for Transfer Pricing & Product Profitability (approx 50 users)
- OLAP / TM1 Analytics engine for slice and dice capability (approx 600 users)
- Scalable and extendable solution
- Classroom End User Training & quick reference guides
- Transition to BAU Support and BI Administrators

Solution Deliverables



Solution Deliverables



Solution Deliverables

The screenshot shows a web browser window titled "IBIS Reporting Portal". The browser's address bar shows "QUIAOIT, Allan" and "Log Off". The page has a navigation menu with "Welcome", "Public Folders", "Data Dictionary", and "My Folders". The main content area features the SUNCORP logo and the "IBIS Reporting Portal" title. Below the title are six dark green buttons arranged in two rows: "Underwriting Reporting", "Policies Reporting", "Claims Reporting" in the first row, and "GI Budget and Forecast", "Financial Reporting", "HR Reporting" in the second row. At the bottom left, a red arrow points to the text "Updates and announcements can be found [here](#)".

Solution Deliverables

Open Net Operating Expenses 2010-10-30 - QUIAOIT, Allan -

Current Period: Budget: Summary View: Show Navigator Hide Navigator

	Month to Date				Year to Date				Full Year
	Actual \$	Budget \$	Var \$	Var %	Actual \$	Budget \$	Var \$	Var %	Budget \$
TOTAL STAFF COSTS (OPX010)									
RECRUITMENT & RELOCATION (OPX011)									
OTHER STAFF COSTS (OPX012)									
TRAINING (OPX013)									
PERSONNEL (OPX100)									
ENTERTAIN & STAFF AMENITIES (OPX205)									
TRAVEL & ACCOMMODATION (OPX210)									
TRAVEL & ENTERTAINMENT (OPX200)									
INTERNAL OCCUPANCY EXPENSE (OPX305)									
OTHER PROPERTY EXPENSES (OPX310)									
RENT (OPX315)									
REPAIRS & MAINTENANCE (OPX320)									
UTILITIES & RATES (OPX325)									
OCCUPANCY (OPX300)									
SUPPLIES (OPX405)									
TELECOMMUNICATIONS (OPX410)									
COMMUNICATIONS (OPX400)									
BUSINESS OTHER ADVERTISING & PROMOTIONS (OPX505)									
MARKETING ADVERTISING & PROMOTIONS (OPX510)									
ADVERTISING & PROMOTIONS (OPX500)									
COMPUTER EXPENSES (OPX605)									
EXTERNAL IT SERVICES (OPX610)									

File Edit View Settings Run Help

Insertable Objects

- direct expenses analysis
- account
- cost centre
- period
- cube attributes
- measure

Rows: OPERATING EXPEN... Columns: - Current Peri... measure (list) Context filter:

	- Current MTD			- Current YTD			- Current Full Yr				
	budget amount	var budget	var % budget	actual amount	budget amount	var budget	var % budget	actual amount	budget amount	var budget	var % budget
PERSONNEL (OPX100)											
TRAVEL & ENTERTAINMENT (OPX200)											
OCCUPANCY (OPX300)											
COMMUNICATIONS (OPX400)											
ADVERTISING & PROMOTIONS (OPX500)											
COMPUTER EXPS & EXTERNAL IT SERVICES (OPX600)											
DEPRECIATION (OPX700)											
EXTERNAL CONSULTANCY & LEGAL (OPX800)											
OTHER (OPX900)											
OPERATING EXPENSES (OPX000)											

Current Financial Year View



Value Outcomes to Suncorp

Value	Outcome	Indicators
	Business Alignment	User Satisfaction Future financial framework for solution Leverage of trusted data
	Cost Reduction	Speed of implementation Business agility and flexibility for reporting and analytics Total cost of ownership
	Speed to Implement	Solution delivery (business and technical) Repeatable and consistent financial solutions Seamless integration and automation for best practice
	Flexibility	Alignment with strategic architecture Extendable solution Leverage existing Cognos skills
	Solution Robustness	Ease maintainability and supportability Ongoing BAU costs Availability to business
	Technical	Integrated platform Powerful & scalable analytics platform Information foundation for financial information



Value is always a balance of outcomes

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