

## IBM Software Group

### Financial Workbench and Scorecard Performance Blueprint



### Solution Description

The IBM Cognos Financial Workbench and Scorecard Performance Blueprint provides a performance management framework—including planning, scorecarding, dashboarding and reporting— that enables retail executives to standardize the corporate-wide planning process, gain consensus between financial and operational plans, identify and monitor key metrics, and ensure all departments are working towards the same business goals.

### Features & Benefits

#### Financial Workbench and Scorecard Performance Blueprint Capabilities

- Integrate the planning process so that merchandising, finance, operations, and marketing have visibility to top down strategic plans and are working towards common objectives and projects
- Use a synchronized top-down planning environment to consolidate bottom-up plans and reach consensus between corporate financial goals, business objectives, and operational plans
- Perform 'what-if' analysis for sales and costs to determine the impact on financial statements and metrics
- Model business scenarios to determine the financial impact of decisions
- Generate integrated financial statements (P&L, Balance Sheet, Cash Flow)
- Pro-rate revenue and costs to meet investment goals, and change assumptions and drivers to see the affect of these changes on financial metrics —while holding other factors constant
- Rapidly re-forecast to adjust to changes in costs or revenue
- Drive collaboration, and streamline the approval and monitoring process. Cross-functional teams gain the ability to work collaboratively. Accommodate both top-down and bottom-up approaches to planning

#### Scorecarding Capabilities

- Set, measure, and monitor key performance metrics based on standard financial statements
- Ensure ownership and accountability for performance
- Assign a primary owner for every metric
- Organize and view scorecards by status (good, average, poor) and trend (up, down, steady)
- Set alerts and notifications so users are aware when a metric changes status
- Embed other business intelligence capabilities for added context and analysis
- Manage corrective actions and initiatives

### Value Proposition

The Financial Workbench and Scorecard Performance Blueprint consolidates and reconciles top-down and bottom-up plans, and allows additional modeling to quantify the impact of business changes. Conduct what-if analysis, model the impact of business decisions and create a company-wide strategic financial plan. The financial scorecard allows executives and managers to monitor execution of strategy against targets. It provides alerting, trending, and action tracking for metrics correction when out of compliance and offers a visual representation of key performance measures. It enables them to communicate goals consistently, manage corrective actions and initiatives, and push KPIs further into the organization.

#### IBM Segment

- Cognos

#### Business Function

- Performance Management

#### Target Industry

- Retail

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