



Global success stories

Deloitte and IBM
Business Analytics

This is an interactive document. Use the links at the side of the page to navigate forward and backward, return to the contents page or skip forward to the next story.

Message from our leaders



Bob Dalton

Principal

IBM Global LCSP and Relationship Leader

Deloitte continues to grow our joint marketplace success with IBM Software, in driving value for our mutual clients. Business analytics and information management is a key priority, especially as companies shift their orientation from hindsight, to insight to foresight, in order to drive better decision making and business results.



Nat D'Ercole

Principal

IBM Business Analytics and
Information Management Leader

Our team delivers solutions that are business focused and enabled by IBM technology. Our clients' success is based on our unique ability to interpret and challenge requirements, design and build solutions with business processes in mind and provide change management and communication services to drive enterprise adoption. I am very excited to share our IBM business analytics and information management client successes with you.



The Deloitte and IBM Alliance – Smarter Together

With a track record of achievement that spans more than 17 years, the Deloitte and IBM alliance combines the strengths of both organizations to help global enterprises address their toughest business issues. This 'smarter teaming' approach often results in better service and higher value for our joint clients.

Our alliance offerings unite the depth and breadth of IBM's technology portfolio with Deloitte's practical, innovative solutions and deep industry knowledge. By working together, Deloitte and IBM offer capabilities that can be tailored to focus on the business issues important to our clients. Our investments and scale are aligned around those issues to deliver broad value-based solutions.

Technology is reshaping how work gets done, how businesses grow, and how markets and industries evolve. In this fast-changing world, many leaders find it's nearly impossible to keep up with emerging technologies that may add value to their organizations. That's where our alliance relationship can help.

Making an Impact

We collaborate with IBM to help business leaders design and implement solutions to improve operations and performance. And we don't stop there. Clients also draw on the strength of our relationship to develop and deliver innovative products and services that can lead to disruptions of business models and markets—and competitive advantages. Through our relationship with IBM, we extend our reach and strengthen value for the clients we serve and for the technology companies we align with around the world.



Success stories portfolio – Deloitte's range of services

Industry	Solution	IBM products	Assessment	Roadmap	Project management	Change management	Process design	Functional requirements	Tool implementation	Testing	AMS
1. Financial Services	Revenue Planning	Cognos TM1			•			•	•	•	
2. Energy/Utility	NGIN - Asset Management Solution	IBM SPSS, Insights Foundation for Energy, Predictive Maintenance and Quality, Pure Data for Analytics, Internet of Things, Cloud Platform	•	•	•		•	•	•	•	
3. Financial Service	Finance Planning and Advanced Analytics	BDWM, TM1 Cognos, Infosphere MDM Reference Data Management Hub , Infosphere Data Stage			•	•	•	•	•	•	
4. Technology, Media & Telecommunications	Sales Performance Management	Cognos ICM	•	•	•	•		•		•	
5. Retail	Sales Performance Management	Cognos ICM		•	•			•	•	•	
6. Technology, Media & Telecommunications	Global Accounting and Tax Reporting	Cognos TM1 & CDM	•	•	•	•	•	•	•	•	
7. Financial Services	Advanced Analytics	SPSS	•	•	•	•	•	•	•	•	•
8. Financial Services	Sales Performance Management	Cognos ICM		•		•	•	•	•	•	
9. Financial Services	Statutory Management Reporting	Cognos TM1	•		•			•	•		
10. Healthcare	Data management & reporting	InfoSphere, Cognos BI Analysis Studio, DataStage	•		•			•	•	•	

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Revenue Planning and Analytics in Financial Services



2 Europe

Asset Management in Energy/Utilities



3 Global

Finance Planning and Advanced Analytics in Financial Services



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Sales performance management in Technology, Media & Telecommunications



5 U.S. and USI

Sales Performance management in Retail



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Sales Global Accounting and Tax Reporting in Technology, Media and Telecommunications



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Financial planning and analytics in Technology, Media and Telecommunications



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Finance analytics



13 U.S.

Financial reporting in Energy



14 Canada

Planning, budgeting, forecasting in Public Sector



15 UK

Planning, budgeting, financial consolidations, management reporting and FSR in Travel/ Tourism



16 Canada

Planning, budgeting, forecasting and financial reporting in Public Sector



17 U.S.

Planning, budgeting and forecasting in Financial Services



18 Canada

Planning, budgeting, and forecasting in Oil & Gas



19 Canada

Planning, budgeting, forecasting and reporting in Professional Services



20 U.S.

Governance, risk and compliance in Financial Services and Energy



21 U.S.

Governance, risk and compliance in Financial Services



22 Europe

Financial governance and internal reporting in Public Sector



23 UK

Sales Performance Management in Financial Services



1 Success Story

US | Revenue Planning and Analytics in Financial Services



Brief description of service

An overseas division of a global financial services corporation had decided to retire its Oracle Financial Analyzer (OFA) system and implement IBM Cognos TM1 to support Revenue Planning and Analytics. The client chose Deloitte to head the effort with a team experienced in both Cognos TM1 implementation and broad financial planning solutions.

What problem does this solve/address?

The Cognos TM1 based solution addressed a number of key challenges with the legacy system, including:

- OFA was an outdated platform not compatible with current technology standards
- The system had limited ability to support the growing needs of the organization for Revenue Planning and Analytics
- Hardcoded business rules in the planning system limited the flexibility to adapt to changes in the business

The unique challenge of this project was to identify, document and migrate all the Revenue Planning functionality implemented in the legacy tool over the previous 17 years. In addition to managing the functionality migration challenges, the project team needed to leverage revenue driver and pricing data from a Global Revenue Data Platform project running in parallel.

Success story

A Deloitte team experienced in technology, financial planning, change management, and business process skills collaborated with the client to provide a business-led and technology supported implementation of Cognos TM1 for Revenue Planning. Deloitte partnered and communicated across client teams from Business, IT and key project stakeholders to deliver the solution. The team also held global design validation sessions and applied iterative requirements gathering and user prototyping sessions to establish a baseline for global roll-out.

The resulting client benefits included reduced effort and manual processes as well as reduced system and information complexity. These changes, in turn, delivered revenue calculations faster and with greater accuracy, increased transparency, and improved forecasting capabilities. The new system provides a standardized Revenue Planning platform through a high-performing in-memory and scalable solution.

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2 Success Story

Europe | Asset Management in Energy/Utilities



Brief description of service

A European utility provider faced numerous challenges: aging assets, reliability issues, and integration of new energy technologies on the grid, including digitation of assets via smart metering and smart grid.

Technology innovations such as IoT, analytics, and cognitive computing can address these issues while creating unique opportunities for the industry. The challenge is introducing new technologies while maintaining smooth, uninterrupted service.

What problem does this solve/address?

Deloitte delivered a consumption-based, pay-as-you-go business model, enabling the utility company to consume what they wanted, when and how they wanted.

Deloitte deployed its Next Generation Infrastructure Insights (NGIN Insights) solution, IoT/Analytics for asset management, which includes asset information management, asset performance management, predictive maintenance, asset management planning, and grid optimization.

The solution is built on IBM IFE/PMQ, integrating pure data for analytics (PDA), and is offered as a cloud solution on the Deloitte analytics platform, hosted at an IBM center. The implementation spans 11 different use cases for both electricity and gas over a time span of three years.

Success story

The client realized significant savings from the solution, including:

- Increased return on capital employed (ROCE) of 6 – 8 percent
- Decreased OPEX of 15 – 25 percent
- Reduction of events on highly critical assets of 70 percent

Other client benefits include identifying best practices, achieving regulatory compliance, and finding a platform to support implementation of ISO 55000.

Deloitte's solution was selected as a runner-up for the IBM 2017 Beacon Award, Outstanding Watson IoT Solution.

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3 Success Story

UK | Finance Planning and Advanced Analytics in Financial Services



Brief description of service

One of the world's premier financial services organizations embarked on a transformation program to deliver faster end-user managed advanced analytics, BI, reporting, data integration, governance, and data quality management across business lines and corporate functions. Deloitte's suite of analytics solutions based on the IBM platform offered them an insight-driven advantage.

Senior management selected Deloitte for its expertise in the Financial Services Industry and IBM technology. The multi-phase implementation began as an accelerated definition of a Business Information Model (BIM) based on the IBM Banking and Financial Services Markets Data Warehouse data model and solution templates

What problem does this solve/address?

BIM and BDW content provided a business-defined semantic layer, describing the core data foundation with end-to-end traceability linked to:

- Data sourcing
- Data movement
- Profiling
- Integration
- Persistence
- Distribution to consumers
- Controls for issue resolution and workflows

The BIM served as a roadmap of the corporate data landscape, helping to identify and capture critical data assets across all data classes, including loans, equities, and fixed income, as well as derivative products from key business data flows such as lending, capital markets, trade corridors and cross-border fund flows.

Success story

Deloitte and IBM teamed to help the client improve the customer experience, gain insight into performance management, and realize better compliance and risk-management.

Having improved the availability and quality of data within the bank, the solution is considered the go-to source for all regulatory compliance and reconciled pre- and post-allocated risk/finance data. The client expects to redeploy an estimated 800 full-time positions.

Deloitte and IBM and will continue to team together as the second phase of implementation is rolled out globally.

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4 Success story

U.S. | Sales performance management in Technology, Media & Telecommunications



Brief description of service

In an effort to drive individual selling behaviors for 1,800 account executives and increase revenue across 160+ markets, a leading American media company needed to deploy a best-in-class incentive compensation program. The company chose Deloitte for the sales performance management implementation, based on its IBM Incentive Compensation Management (ICM) accelerators and methodology, as well as change champion and stakeholder alignment strategies.

What problem does this solve/address?

In addition to lack of visibility into their sales compensation metrics and inability to optimize their commission spend, the client faced operational inefficiencies due to lack of an automated solution. Without a best-in-class tool to provide accurate performance reporting, the client had limited insight to the competitive landscape for timely decisions and a reliance on many manual processes that were prone to human errors.

Success story

Working together, Deloitte and IBM delivered the envisioned best-in-class ICM solution that will provide the client with the following:

- Enhanced Reporting – increased agility and accuracy, and greater ability to monitor issues or trends
- Operational efficiency – Improvements in ability to quickly adjust incentives, launch new programs and awards, systems integration, workflow/approvals, and commission spend
- Modeling tools – Deal-based sales incentive modelling to help AEs modify levers that impact their sales incentives
- Dashboards/leaderboards – Timely visibility into metrics (including pipeline data) and increased visibility for sales leaders to monitor and motivate AE team and direct behavior
- Time to market – Flexibility to respond to market dynamics with updated compensation plans, performance metrics and reporting

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5 Success story

U.S. and USI | Sales Performance Management in Retail

Brief description of service

Deloitte and IBM worked with a major retailer to evaluate their requirements for automating their review and Pay for Performance programs. Deloitte was engaged to provide implementation and training services for the IBM Cognos ICM (Incentive Compensation Management) product to help automate client service team compensation calculations. To help deliver the newly automated review and Pay for Performance program, Deloitte provided step-bystep operational training, job aids, and a training video for new hires and existing staff.

What problem does this solve/address?

One of the major drivers for the project was the client's dissatisfaction with the reliability and consistency issues that they had with their current – mostly manual – review and Pay for Performance program. An internal audit had found that compensation calculations and payouts for client service teams had been inconsistent and lacked a proper audit trail. To address these issues, Deloitte worked with the client to identify and understand the entire review and Pay for Performance program and then documented the program requirements. Deloitte leveraged their Sales Performance Management (SPM) expertise to design a fully automated solution which included coaching the client's team on how to create automated data feeds into and out of the new system, including automated data validation.

Success story

Deloitte's SPM experts helped the client design a new set of reports that provide associates clear visibility into the metrics and scores and provide the management with a detailed view into the top down performance by team. Deloitte was able to work with the client to define a phased approach that met their initial needs as well as their long-term strategic vision for establishing accountability and rewarding performance.



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6 Success story

U.S. | Global Accounting and Tax Reporting in Technology, Media and Telecommunications



Brief description of service

Deloitte assisted a global technology leader in the implementation of Automated External Reporting (AER), for purposes of streamlining its statutory accounting and global tax reporting processes. The project leverages IBM's extensive toolsets, including DB2, Cognos TM1, and Cognos Disclosure Management (CDM), to create efficiency and automation inside the client's complex tax and statutory reporting structure.

What problem does this solve/address?

This vast and complex business that spans hundreds of countries and legal entities has made a significant effort over the last eight years to capitalize on the increasing movement towards IFRS in many of the countries that require corporate subsidiaries to file statutory financial statements. Following the success of these efforts, the client decided to attempt to further reduce the cost and complexity of its global statutory accounting and tax reporting processes. This involved streamlining spreadsheet-driven processes by using data analytics software to gather the vast information it already had in its massive data warehouse to produce the elements of its statutory financial statements and tax returns world-wide.

Success story

The AER solution is designed to eliminate manual databases and spreadsheets, reduce the time required to perform existing processes, and leverage the client's accounting systems. With improved governance, workflow and data validation, follow-on AER benefits can include:

- Scalability to handle virtually all elements of statutory reporting and tax reporting requirements to the extent the requirements are common to many countries
- Reduced risk with enhanced control
- Ability to use and re-use the same data for multiple reporting purposes
- Opportunities to employ analytics that can provide management with better and more efficient centralized scenario planning

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7 Success story

China | Advanced Analytics
in Financial Services

Brief description of service

Deloitte assisted a leading provider of property and casualty insurance that was looking to transform its claims handling process in order to achieve its commitment to operational excellence and increase its competitive advantage. The client had been plagued by numerous marketing and operational challenges, including claims variability, unsophisticated data collection processes, and lack of adequate internal controls and policies. Deloitte's offering included design, implementation and test services, and was enabled by IBM's SPSS predictive analytics software.

What problem does this solve/address?

The many marketing and operational challenges resulted in significant implications for the client's bottom line as well as its competitive position. These implications included:

- Limited visibility, control, measurement, and tracking of claims fraud
- Suboptimal third-party relationships – savings “left on the table”
- Inconsistent adjuster and repair shop performance and inconsistent agent, customer experience
- Limited knowledge of third-party performance
- Difficulty in capturing and sustaining savings over time

Success story

The AER solution is designed to eliminate manual databases and spreadsheets, reduce the time required to perform existing processes, and leverage the client's accounting systems. With improved governance, workflow and data validation, follow-on AER benefits can include:



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8 Success story

Canada | Sales Performance
Management in Financial Services

Brief description of service

A major Canadian banking group was looking for a replacement for their limited Services Revenue system, a combination of homegrown systems and vendor systems. Deloitte and IBM Lab Services worked closely with the client to design and implement a replacement system built around IBM Cognos ICM.

What problem does this solve/address?

The client used the Cognos ICM-based "Sales Revenue" system to pay their salespeople based on factors such as strategic importance, profitability and time required to sell their products. The goal for the new system was to improve functionality and reporting to enable sales leaders to better incent and recognize the sales and service activities within the retail and direct sales channels, ultimately driving behaviors to increase sales and deepen customer relationships.

Success story

The new system has positioned the client's organization for:

- Growth, through providing the flexibility to implement new and innovative pricing strategies
- Efficiency in terms of making on-going changes quickly and easily
- Scalability to work in Canada and the United States with businesses which currently have different year-ends



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9 Success story

UK | Statutory Management Reporting in Financial Services



Brief description of service

In preparation for a major regulatory reporting requirement (Solvency II), a global financial services organization identified the need for a modeling and reporting solution across the areas of actual and forecast capital reserves. The client engaged Deloitte to provide a Solvency II solution, based on IBM TM1, to help meet its statutory and management reporting requirements.

What problem does this solve/address?

One of the challenges faced by the client was that the precise ramifications of Solvency II reporting were not yet fully known at the time of the engagement. Deloitte proposed and delivered an agile, iterative development approach, providing a degree of flexibility that enabled the both the Deloitte and internal project teams to work collaboratively, and respond to evolving requirements effectively and on time.

Other challenges included:

- The client already had IBM TM1, which was satisfying IFRS reporting requirements. The “new” solution had to dovetail with this existing model without placing undue strain on it or the existing hardware environment.

- Enforcement of SII was mandatory for the insurance industry, with heavy penalties proposed for those who missed the “go live” date(s).
- At project start, notes on SII Pillar 1 had been issued by the regulators, Pillar 2 arrived half way through and Pillar 3 was expected beyond the engagement, so design and approach was made flexible to allow adoption of these unknowns. Client was expecting to replace their actuarial system soon after project end, so interface had to be designed to allow for future change

Success story

In just four months, Deloitte provided an operational version of the Solvency II reporting capability, enabling the bank to meet its statutory reporting obligations for Pillar 2, with an open architecture to allow encompassing of follow-on Pillar 3 requirements.

To help the bank derive maximum value from the expanded system, the Deloitte team provided end-user training and effectively transferred the solution over to an internal competency centre for ongoing maintenance and enhancement.

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10 Success story

U.S. | Data management and reporting in Healthcare



Brief description of service

A global healthcare company with expertise in medical devices, pharmaceuticals and biotechnology was looking to integrate data from multiple legacy systems. Due to the disparate systems, they were unable to provide a single version of the truth or evaluate business for global users, and needed to enable timely BI adoption to a major JDE ERP upgrade. Deloitte was chosen to develop and implement a data management and reporting solution called Analytics Factory, which integrated, conformed and stored data from JDS, Peoplesoft, Hyperion and Cognos Contributor systems.

What problem does this solve/address?

For some time, critical status reports had been delivered much later than needed or contained scrambled data, making it difficult to get ahead of problems. Additionally, because each division managed reporting and analysis independently, there was little consistency in the data. The Deloitte-developed factory environment provides the foundation for an enterprise data warehouse containing information that can be leveraged across all divisions.

The solution leverages IBM InfoSphere Information Enterprise Edition, DataStage, Cognos and data quality checks to integrate data from enterprise systems, monitor data integrity, and provide a global reporting platform. IBM Cognos is used to support all regional and global reporting needs, providing multiple canned reports, dashboards, DMR cubes and self-serve reports. Deployment of DMR reduced batch windows and enabled timely delivery of data. Power users also used Analysis Studio to perform deep dive analysis.

Success story

Consisting of more than 4500 DataStage jobs, 200 reports, and 25 virtual/physical cubes, the Analytics Factory solution has provided the client with visibility into various standardized KPIs across the globe. The client is now able to analyze global daily sales at the customer level, and benchmark business performance globally across regions and countries. The solution has also helped improve enterprise efficiency, by maintaining optimal levels of inventory globally. Process and data quality methodologies developed for this solution are being extended out to Supplier Management, Product Development and R&D organizations.

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11 Success story

Canada and U.S. | Financial planning and analytics in Technology, Media and Telecommunications



Brief description of service

Following an investment in IBM TM1, Controller, BI, Business Viewpoint, FSR, a global media and entertainment company experienced a troubled Phase 1 rollout with its initial implementation partner. The client asked Deloitte advisors for assistance in overcoming inefficient Finance information processes, limited financial reporting and analytics capabilities, poor finance analytics information governance, and ineffective information systems. Deloitte was engaged to help modernize and improve finance analytics processes, controls, information, organization, and systems, and to assist with off-shore sustainment.

What problem does this solve/address?

The resulting enterprise planning and analytics initiative was designed to help the company achieve improvements in Close, Consolidations and statutory reporting, as well as Plan, Budget, Forecast, Management Reporting and Analysis. A multi-disciplinary Deloitte team with technology, change management, business process and xBRL compliance skills collaborated with IBM Cognos Lab Services to provide a business-led and technology-enabled implementation of the IBM Cognos Finance Analytics Suite. Deloitte assisted the client in implementing its initiative, designed to provide improvements in Close and Variance Commentary, Consolidations and SEC disclosure reporting, Long Range Forecast, integrated and driver based Budgeting and Forecasting, and Internal Reporting to over 300 users across North America and International locations.

Success story

Following the first wave of implementation, the company experienced a modernized financial analytics solution comprising new processes, standardized data, and common finance analytics systems capable of scaling for the next ten years, extending from North American operations to International units.

- One version of the truth for actual, proforma, budget, forecast, commentary and currency effected results for North America and International
- Sustainable enterprise financial reporting solution, eliminating costs to redo chart of accounts for North America and International
- Reduced system and information complexity and faster delivery of the budget from prior years (from 3 months to 1.5 months) and reduced effort and complexity to complete an intuitive driverbased forecast for North America
- High-performing in-memory and scalable solution that solved the accounting and finance organization’s data, talent, and processing crunch Internal business, systems, and change management capability, with a low-cost sustainment organization supporting the transition from legacy to modernized systems and processes for North America
- Ability to embed Excel and PowerPoint to enable self-service reporting in Division Finance, Accounting, and NorthAmerican markets

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12 Success story

U.S. | Finance analytics



Brief description of service

A global organization needed to improve its financial analytics capabilities. Its existing environment was hampered by a lack of standardized processes, duplication of effort, lagging controls, and poor data quality – making it difficult to achieve transparency in business operations or use information to plan strategically. Deloitte was engaged to design and implement standardized business processes and systems to reduce process cycle time, establish data structures to support highly relevant analysis, and enable emerging business needs through a scalable IT infrastructure.

What problem does this solve/address?

Deloitte worked with the company to develop and implement a finance analytics roadmap, focused on improving business processes, implementing an industry centric information model, and leveraging existing technology investments to enable a scalable yet flexible architecture. Deloitte worked side-by-side with business leaders and analysts to understand the business needs, design business processes, and define the enabling technical architecture. Deloitte practitioners provided both the technical and financial expertise necessary to validate that the required finance analytics capabilities were embedded in the solution. To align the solution with current organizational standards and capabilities, the team proceeded with an IBM Cognos TM1 and Microsoft SQL-Server-based solution, architected to scale as business needs evolved. The team leveraged an incremental “prototype, build, and deliver” approach to manage organizational change and engage the business community in the evolving solution.

Success story

From a technology perspective, the new platform was vastly simplified, easier to support, and more efficient – including a 20x reduction in applications that required support and a 50-percent reduction in data integration code, both of which have contributed to improved efficiency and a 99.9 percent scheduled availability record. More importantly, the solution enabled a redeployment of IT resources from “supporting and patching” to “value-added” systems enhancements.

From a business perspective, the time required to perform work was reduced and the quality of analysis improved. Financial analysts spent less time solving data challenges and more time delivering analysis linked to business needs, such as a 30-percent reduction in business cycle duration and the reduction of many last-mile processes from days to minutes. These improvements were a direct result of business process changes, improved confidence in information used for analysis, and improved reliability of underlying technology. Overall, this initiative streamlined analysis, refocused resources on strategic business objectives, and established an integrated global business process that drives performance.

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13 Success story

U.S. | Financial reporting in Energy



Brief description of service

A global energy company was having problems with their financial close and reporting process. While they had already implemented IBM Cognos CDM (Cognos Disclosure Management), the IT group was still relying on legacy manual processes that limited their ability to fully leverage the software's capabilities. The company engaged Deloitte to perform an assessment to identify the issues and recommend new procedures to improve their Financial Close and Reporting process.

What problem does this solve/address?

Deloitte and IBM then teamed on a high-level assessment of the Cognos CDM implementation and identified a number of issues and opportunities, including:

- Limited use of validation rules led to over 100 hours of manual reconciliation
- Manual sourcing of data through lead sheets was causing confusion
- IT's lack of experience with SQL was limiting the assistance that could be provided to the reporting team in resolving CDM error messages
- Training sessions performed in groups outside of the reporting team was confusing and inadequate

Deloitte provided the client with leading-practice insight pertaining to the Cognos CDM tool and its capabilities. The team conducted stakeholder interviews as well as a performance test of the Cognos CDM environment and made recommendations based on performance benchmarks. They were also able to provide input from a team of SMEs (e.g. SEC reporting team) at critical stages.

Success story

Based on the success of the project, the client requested Deloitte's assistance to immediately implement every identified quick-hit initiative and begin planning to assist in the implementation of the long-term initiatives. The client has been able to improve the performance of their financial statement reporting environment and has begun to make changes to the overall process, which will help them continue to improve data governance and capture efficiencies.

From the engagement, Deloitte developed a repeatable, sophisticated maturity model that helps clients evaluate their financial statement reporting capabilities compared to other leading companies and assess future enhancement opportunities to further evolve their use of the tool.

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14 Success story

Canada | Planning, budgeting, and forecasting in Public Sector



Brief description of service

A Canadian municipal government chose to build upon their capabilities, where we had developed an integrated budgeting, planning and reporting solution and operating budget model for a particular department. Upon successful completion, we then developed and implemented a corporate compensation planning model for the entire organization. During this second phase of engagement with the client, we leveraged the technical environment developed previously, adding new functionality to an existing TM1 environment.

What problem does this solve/address?

Most organizations grapple with their budgeting. Between aggregating disparate data, parsing massive amounts of information and reconciling all accounts, the process can be exceptionally cumbersome and extremely time-consuming. With this problem solved via the initial TM1 environment implementation (phase 1), we then developed both a CPM solution, IBM Cognos Xcelerator (TM1), for budget and compensation planning, and Cognos Advisor (Executive Viewer) for end user reporting and analysis, across the organization (phase 2).

Success story

After phase 1, the client's department was able to automate their budget model, which allowed for reduced data inaccuracy and vastly accelerated the budgeting process. It also positioned the client's department to quickly build and easily generate accurate and meaningful reports. Allocating expenditures over various programs was streamlined. Rather than a cumbersome, days-long process, the client's department was able to allocate instantly and immediately confirm that all numbers reconcile. By freeing up staff time from manual reconciliations, the client's department was able engage in more meaningful data analysis – a function further supported by the system's ability to automatically analyze disparate data groupings, compare data and support accurate forecasting.

After phase 2, the client had a tool to allow them to conduct 'what if' scenario analysis in real-time and assist with collective bargaining negotiations, incorporate part-time and vacant positions in their budget, isolate the cost and FTE impact of strategic initiatives and build ad-hoc management reports. As well, the compensation planning input process was greatly streamlined, with greater transparency and accountability between the corporate budget planning teams and individual departments.

The entire organization now benefits from a modernized, compensation planning tool that is utilized by 30+ users across all departments. With increased automation and accuracy to the process, the organization can now spend less time on inputting employee information, and more time leveraging the analytics capabilities of the compensation model.

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Story List





15 Success story

UK | Planning, budgeting, financial consolidations, management reporting, and FSR in Travel/Tourism

Brief description of service

Deloitte was engaged to manage overall project delivery for a leading travel agency, based on our long-standing relationship, industry experience, and strength in delivering financial and operational performance solutions. We provided vendor assessment of a range of software applications that were identified as being well-suited for the existing IT architecture. In addition, Deloitte consulted on several aspects of the design document to support infrastructure, security and data integration. Finally, Deloitte resolved infrastructure and implementation issues and provided advice around specific build requirements.

What problem does this solve/address?

As a consequence of its rapid growth through acquisitions, the travel agency had poor insight into the financial and operational performance of their business segments, despite the high cost of its systems environment. The core problems included lack of a unified approach to Group Consolidation reporting, no functional platform to support innovation, and outdated, no longer supported software. The travel agency and Deloitte evaluated its existing systems and software.

The goal was to select new, integrated solutions for consolidation, reporting and financial planning and eliminate inefficient, older technologies. With an aged technology platform and an immediate need to improve business analytics capabilities, Deloitte delivered a comprehensive solution including Cognos Controller, TM1 Financial Analysis, and Cognos BI software, quickly and efficiently.

Success story

As a result of the software implementations, the client realized substantial gains in efficiency, effectiveness, improved capabilities, and scalability. Efficiency was achieved through a consistent IBM Cognos application platform and centralizing chart of accounts, source ledger interfaces and business reporting enabled the client to fully automate consolidation processes and unlock workflow efficiencies. Effectiveness was achieved through improved understanding of segmented information, common management information, and increased flexibility to meet stakeholder demands. Improved capabilities stemmed from direct technology gains once Cognos Controller, TM1 Financial Analysis, and Cognos BI software were operational and utilized. Finally, scalability was achieved through the successful implementation of architecture and information infrastructure, unlocking opportunities to rollout Cognos Controller to further business segments, as well as extend the TM1 Financial Analysis software upload to integrate flat files from other segments of the company.



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Story List





16 Success story

Canada | Planning, budgeting, forecasting and financial reporting in FSI



Brief description of service

A leading Canadian pension fund chose to implement IBM Cognos Business Intelligence for financial reporting and upgraded its financial reporting, planning and forecasting processes to IBM Cognos TM1. To manage complex hierarchies, structures and dimensions, the team also implemented IBM Cognos Business Viewpoint.

What problem does this solve/address?

As large pension companies continue to grow in both membership and assets, the complexity of their financial accounting structure can become onerous. With numerous sets of books and unique charts of accounts, it can be difficult to get an enterprise-wide view of the financial position, and analysts can spend the majority of their time reconciling financial statements and validating data; diverting them from more valuable endeavours.

Success story

As a result of the successful Cognos implementations, the client accelerated reporting processes, gained deeper insight into operations, improved integration between finance and planning and achieved simpler, more efficient planning. The solution united multiple sets of books and charts of accounts into a single source of truth, eliminating the need for manual reconciliations and saving several days per quarter. It accelerated financial report generation significantly, delivering vital data to business users in near real time, providing better insight into the business, and leading to timelier, proactive decisions. An allocation process was streamlined, equating to an annual processing time saving of approximately 30 hours. In addition, information governance was improved by ensuring continued compliance with International Financial Reporting Standards (IFRS) and streamlining external audits.

The solution united multiple sets of books and charts of accounts into a single source of truth, eliminating the need for manual reconciliations and saving several days per quarter.

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Story List





17 Success story

U.S. | Planning, budgeting and forecasting in Financial Services



Brief description of service

A leading specialty insurance provider engaged Deloitte to implement a solution to enhance their planning, budgeting and forecasting capabilities. The key business objective was accurate and timely submission of their annual plan, forecast, and extended year plans. These objectives were impeded by the manual nature of existing processes and technology limitations. Deloitte delivered the IBM Cognos TM1 solution for improved planning, budgeting and forecasting and built seamless integration between SAP and TM1.

What problem does this solve/address?

Deloitte delivered a comprehensive solution that improved the client's existing financial planning operations, processes and technology, which lacked capabilities to deliver timely plans, forecasts and extended year plans. Deloitte led the client through all phases of the system development life cycle to go-live and provided post production support. The phases included analysis, design, build, test, training, deployment and post go-live support. Key elements of the solution included: determining appropriate sizing and server requirements for planning, budgeting, and forecasting, upgrading the hardware platform, building and enhancing templates for data entry and reporting, implementing improved security and workflow controls, enhancing the capability for performing allocations across lines of business and branches, and automating the generation of adjustment journal entries.

Success story

The client realized substantial gains from the IBM Cognos TM1 solution and SAP / TM1 integration. The redesigned TM1 application transformed the client's planning process through improved controls and enhanced reporting and analytical capabilities. Deloitte enabled the client to complete their annual forecasting and planning cycle after the implementation of the new GL tool.

The solution eliminated several key manual processes, provided end-to-end planning and forecasting capabilities, and provided an improved user interface with better data validation controls to improve the accuracy of budget and forecast submission.

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Story List





18 Success story

Canada | Planning, budgeting, forecasting and reporting in Professional Services



Brief description of service

When Deloitte's internal firm client needed to select the most effective tools for its Enterprise Planning System (EPS), they selected IBM Cognos TM1 technology. With the experience gained from over eight years implementing Cognos software solutions for clients across North America, and more than 200 implementations globally, Deloitte's Performance Management Technologies (PMT) practice supported this major implementation.

What problem does this solve/address?

The client had been using non-standard processes and tools including disparate spreadsheets and business rules. This process was labour-intensive and difficult to coordinate, and it contributed to a lack of consistency surrounding assumptions, versions, and data integrity. There was no transparency of planning progress or bottom-up buildup of the plan and there was no way to complete forecasts at a detailed level. Most importantly, these non-standard tools provided no alignment between the overall plan and the firm's compensation

methodology. Essentially, the new enterprise planning, budgeting and reporting capabilities were designed to help the client overcome systemic historical challenges.

Success story

As a result of the Cognos TM1 based implementations, the client realized substantial gains. Deloitte replaced hundreds of manual processes with optimized and consistent calculations, version control, and real-time reporting. "One Deloitte" planning templates replaced spreadsheets, and data is automatically loaded and aggregated, ensuring consistency of calculations and version control. Value-add analytics include self-service querying, charting and reporting. The solution is highly scalable, allowing drill-down from metrics to lower levels, as well as detail or summary forecasting. There is transparency into a bottom-up plan buildup, as well as improved top-of-house communication to lower levels. The solution also provides leaders and planners with the ability to create real-time in-flight reports.

The solution united multiple sets of books and charts of accounts into a single source of truth, eliminating the need for manual reconciliations and saving several days per quarter.

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Story List





19 Success story

U.S. | Governance, risk and compliance
in Financial Services and Energy

Brief description of service

Deloitte's Dodd-Frank rule repository and assessment tool for Derivatives (Title VII) is built using IBM Open Pages technology and is designed to help market participants comply with the complex implementation of the Dodd-Frank Wall Street Reform and Consumer Protection Act's ("Dodd-Frank" or the "Dodd-Frank Act") regulations. Clients will need to identify applicable rules from thousands of pages of regulatory rulemaking, coordinate among their legal, compliance, technology, operations and risk departments and make strategic decisions to respond to a new financial and regulatory landscape. The tool accelerates this process with a consolidated library that contains the rules and related metadata assembled from selected US-based regulatory agencies and augmented with Deloitte's understanding of the operational implications of the rules. The content is also decomposed into discrete project activities that firms can use as a basis to initiate change.

What problem does this solve/address?

The Dodd-Frank Act brings on a host of new and complex regulations to an already highly regulated marketplace. US regulators are tasked with finalizing rules to implement the Act while market participants are struggling to digest and understand how these new regulations will impact their business functions. Organizations are currently attempting to track and monitor the rules on spreadsheets. The process can be manual, error-prone and unreliable.

Success story

Deloitte has been selected by multiple Financial Services and Energy firms to assist with Dodd-Frank compliance programs. These assessments accelerate the process by using a central repository and tool as the foundation. The rules organized in the library can be downloaded in various formats and can feed client's project management reports. These rule feeds can then serve as the basis for creating project checklists, developing implementation working groups and distributing tasks.

Advanced graphical reporting supports project management requirements from many levels, by providing multiple ways to aggregate and drill-down on information using dynamic filters based on roles and responsibilities. In addition, the interactive reports provide a means to educate individuals on the intricacies of the regulations. Moreover, workflow can be added to facilitate and automate existing manual processes around communication between multiple parties. The tool supports expanding the library quickly as organizations are working with different sections of the Slaw and is highly configurable.



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Story List





20 Success story

U.S. | Governance, risk and compliance in Financial Services



Brief description of service

The client was interested in replacing their Sarbanes Oxley (SOX) self-assessment controls tool, which consisted of an eRoom filled with various document types such as narratives, test plans, test results, self-assessments, policies etc. A Microsoft Access database was used to create and manage numerous standard and ad-hoc reports as well as spreadsheets. To support this strategy, Deloitte helped facilitate a formal vendor selection process.

What problem does this solve/address?

Managing spreadsheets became a tedious and time consuming effort and there was no direct link to the overall 404 self-assessment process, 302 Certification process, and all phases of testing. Other issues included manual notification, difficulty identifying role changes, and manual generation of status reporting. To resolve the client's problems, Deloitte performed the following:

- Development of functional requirements; technical requirements and high-level technical architecture; a vendor short list; a Request for Information (RFI); a demo script; and development of vendor evaluation criteria and weightings
- Consolidation of RFI responses
- Coordination of vendor demonstrations
- Consolidation of client vendor scoring and vetting against requirements
- Development of high-level gap analysis of selected vendor and client requirements

- Leveraged results from the vendor selection as the basis for the functional, technical and people requirements
- Developed application mock-ups to enable the client to see a preview before the system was developed
- Created the detailed project plan; a customized application and administration guide
- Conducted detailed training sessions for the global organization including "train-the-trainer"

Success story

As a result of the formal vendor assessment and selection process, the client realized substantial gains. Deloitte provided the following:

- Vendor short list
- RFI-detailed functional, technical, general, and vendor requirements
- Detailed demo script
- Automated scorecard – multiple worksheets including functional, subjective, validation, cost, and general/vendor summaries, vendor RFP responses, vendor RFP Comparisons, vendor self-assessment scores, various scores by user groups
- Full-time on-site resources during the implementation effort, enabling the client to make faster decisions
- A solid foundation for data mapping, report templates and the ability to expand into other areas such as compliance and operational risk

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Story List





21 Success story

U.S. | Financial governance and internal reporting in Public Sector



Brief description of service

A U.S. public sector defense department engaged Deloitte to provide an internal collaboration tool to facilitate budget data compilation and integration with justifications, using IBM Cognos CDM. The budget data compilation involves the creation of a Budget Estimate Submission document which is submitted to the defense department for review and then finalized as the President's budget. This budget is then presented to Congress for approval. In a typical environment, data and content for the budget document is assembled from disparate systems, individuals and teams. Based on feedback from the client, managing version control, process workflows and validating numeric values in narratives against system-generated data were all challenges that required tedious manual labor to accomplish. Deloitte's service was phased: report framework creation, source data preparation, validation and controls creation, and workflow review.

What problem does this solve/address?

Managing version control, process workflows and validating numeric values in narratives against system-generated data were all challenges that required tedious manual labor to accomplish. Deloitte delivered the following:

- **Report framework creation:** The budget report was broken down along lines of its content so that content, workflow and data can be managed collaboratively by their respective stakeholders and owners.

- **Source data preparation:** Deloitte worked with the defense department to identify the budget document's underlying data sources and where possible, normalizing similar data and creating controlled input mechanisms for manual input.
- **Identify and create validations and controls:** Creating validations and controls within the document allowed for simple checks and balances to be centrally managed and easily reviewed.
- **Process workflow review:** Worked with the client to determine the overall process to assemble the budget report, uncover areas where their process can either be streamlined or technology can be employed to reduce FTE's spent on document assembly.

Success story

As a result of the IBM Cognos CDM solution, the client identified inefficiencies. The ability to manage version control, process workflows and validate numeric values in narratives against system generated data were all streamlined and automated. Budget submission, starting from the creation of a Budget Estimate Submission document to submission to the defense department for review became more efficient. As a result, the Agency's President's budget submission could be finalized in a timely manner to then be consolidated and passed to Congress for approval.

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Story List





22 Success story

U.S. | Sales Performance Management in Financial Services



Brief description of service

Following Deloitte's successful implementation of Salesforce.com software, the client again engaged Deloitte to assist in consolidating its sales operations into a single incentive compensation management platform for sales incentives across geographies (US, Canada/Latin America, EMEA and Asia). Deloitte proposed a solution based on IBM Cognos Incentive Compensation Management (ICM) that would automate the 2015 sales compensation eligibility determination, payment rules, and incentives reporting for each region.

What problem does this solve/address?

The major driver for the project was the client's need to standardize and automate their sales incentive calculation procedures. While some of regions already had some level of automation, others were completely manual, and the result was a mismatch in the types and detail level of reporting available to sales representatives and leaders from region to region. This made assessing the performance of individuals and the program overall a difficult, time-consuming task.

Deloitte worked with the client to help determine a future state vision that would address these challenges, then helped enable that vision with a solution built on IBM Cognos ICM. Deloitte's deliverables included the following:

- Definition of a general process for calculating incentives across geographic regions.

- An integrated, automated solution for calculation of sales incentives that accounted for all region-specific eligibility and incentive rules.
- Automated inbound/outbound integration of sales data with the corporate data warehouse.
- A robust reporting solution that provided sales representatives and leadership with access to sales incentive reporting, at both individual and aggregate levels.
- Payroll Approval workflows with dashboard for viewing the status as well as approval reports to view and approve payments.
- Trainings on the tool and the implemented model to prepare stakeholders for using the system in production.

Success story

By providing the client with a single incentive compensation management solution for all of its geographic regions, Deloitte was able to help create a platform capable of providing a clear line of sight between sales performance and pay, at both at the individual sales representative level and the leadership level. The IBM Cognos ICM solution was selected based on its promise of greater accuracy and significantly less maintenance than the legacy solutions it replaced.

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Story List





23 Success story

U.S. | Sales Performance Management in Financial Services



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