



# Top 7 Trends in Corporate Performance Management

# Speaker Bio



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15 Years – Corporate Performance Management

7 Years – ERP and Business Intelligence

### Industries

- Retail
- Healthcare
- Manufacturing
- Oil & Gas
- Financial Services

### Specializations

- Hyperion
- Oracle EPM Cloud
- OneStream

# Topics

1. Strategy First
2. Speed to Value
3. AI, ML, Bots, and RPA
4. User Experience
5. Enterprise Data Governance
6. Making “Unicorns”
7. CPM Beyond Finance

# Poll Question

**Q: What are the biggest challenges you are facing in your current CPM processes (check all that apply)?**

1. Accuracy
2. Time wasted tracking data in Excel
3. Lack of visibility into process
4. Incomplete information
5. Internal resource constraints
6. Too many concurrent projects

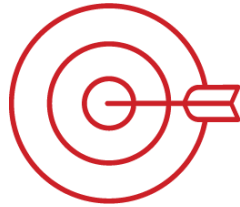
A blurred background image showing a person's hands holding a pen over a laptop keyboard. The text "Strategy First" is overlaid in white, bold, sans-serif font in the center of the image.

**Strategy First**



## Cloud Strategy

Understand each stage of an enterprise cloud transformation to achieve your desired business objectives



## Strategic Assessment

Perform critical analysis of business processes and systems to inform the visioning & roadmap



## Execution

Execute with help from system integrator to produce measurable outcomes.



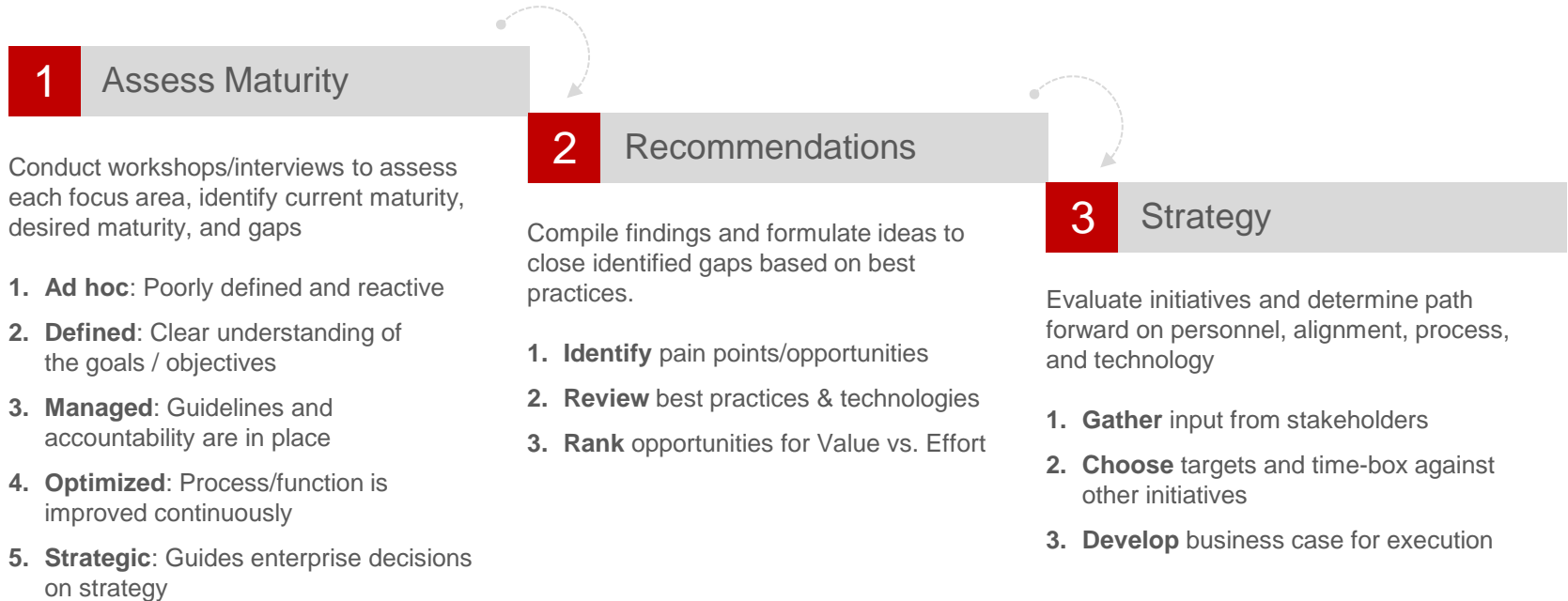
## Change Management and Support

Establish training, change management and post-implementation support beyond the go-live

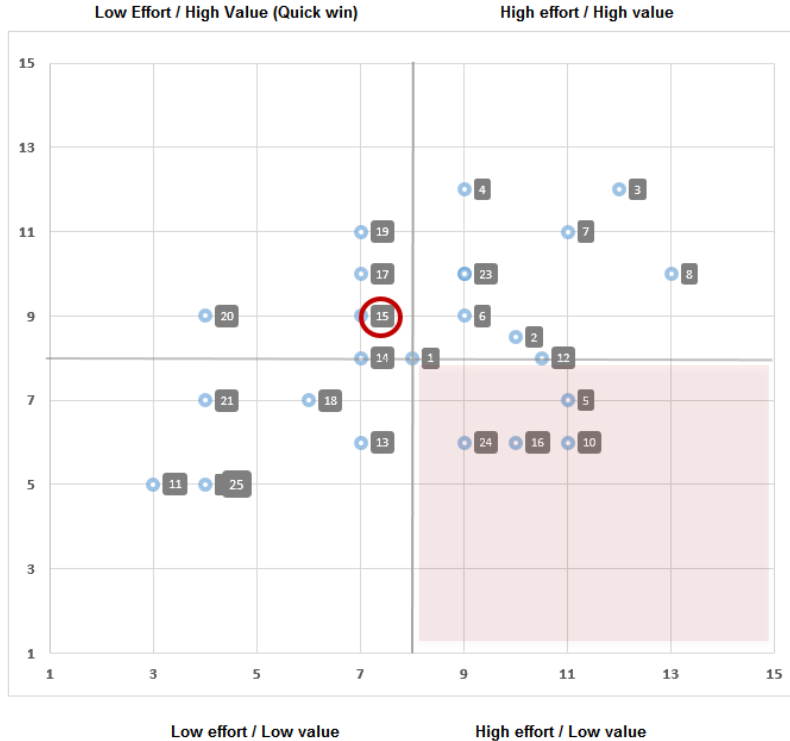


# Financial Process Optimization


The objective is to assess the CPM functions. The result is a strategic roadmap with **process improvement recommendations, design suggestions, and prioritized objectives.**



# Ranking Finance Initiatives



Ref ID	Name	Total Effort Score	Total Benefit Score	Release
1	Reduce load/consolidation conflicts	8	8	2
2	Single-factor management allocations	10	8.5	1
3	Separate legal spread from Budget/Outlook	12	12	1
4	Eliminate unnecessary detail in Budget/Outlook forms	9	12	1
5	Enable drill-back on SAP data	11	7	
6	Enhance custom dim design (user experience)	9	9	1
7	Build integration to SAP for capital planning	11	11	1
8	Add fixed asset reporting to Oracle and link to Outlook	13	10	3
9	Add long range plan to PROD	9	10	3
10	Implement packaged app for external filings	11	6	
11	Add definitions for calculated Key Performance Indicators	3	5	1
12	Implement Close Manager / Workflow solution	10.5	8	2
13	Automate Bully allocation cutback	7	6	
14	Deploy executive dashboards	7	8	1
15	Support IFRS reporting (Iledger)	7	9	2
16	Electronic certification of financials	10	6	
17	Improve performance of MDA report	7	10	1
18	Create recurring journals for guarantor reporting	6	7	2
19	Automate labor rates for Outlook	7	11	1
20	Expand Cash account detail	4	9	2
21	Improve process for Plan cube restructure	4	7	1
22				
23	Implement MDM tool for dimension versioning and approvals	9	10	1
24	Field admin template	9	6	
25	Migrate backlog cube to cloud	4	5	3

 Current initiative





# Speed to Value

By 2020, at least 75% of organizations will seek to improve the accuracy and “actionability” of financial planning and analysis by using operational data from multiple business domains.

By 2020, at least 25% of organizations will achieve more collaborative, continuous and consistent financial planning and performance management by closely linking key operational and financial planning processes.

(Gartner, 2017)

# Solutions and Accelerators



Corporate  
Finance & HR



Operations



Executive



Information  
Technology

Planning &  
Forecasting

Financial Close

Costing

Analytics

Tax

Compliance

## Vendor Platform

Enterprise Data Governance

Extensible

Rapid Release

Relational / OLAP Blending

# Poll Question

**Q: What are the top reasons your organization is considering a CPM initiative (check all that apply)?**

1. Cost savings
2. Improving the finance process
3. External reporting requirements (IFRS, IPO, statutory, etc.)
4. Mergers and acquisitions
5. Modernize legacy CPM solution
6. Change in ERP or Chart of Accounts
7. Not considering a CPM initiative at this time



# AI, ML, Bots, and RPA

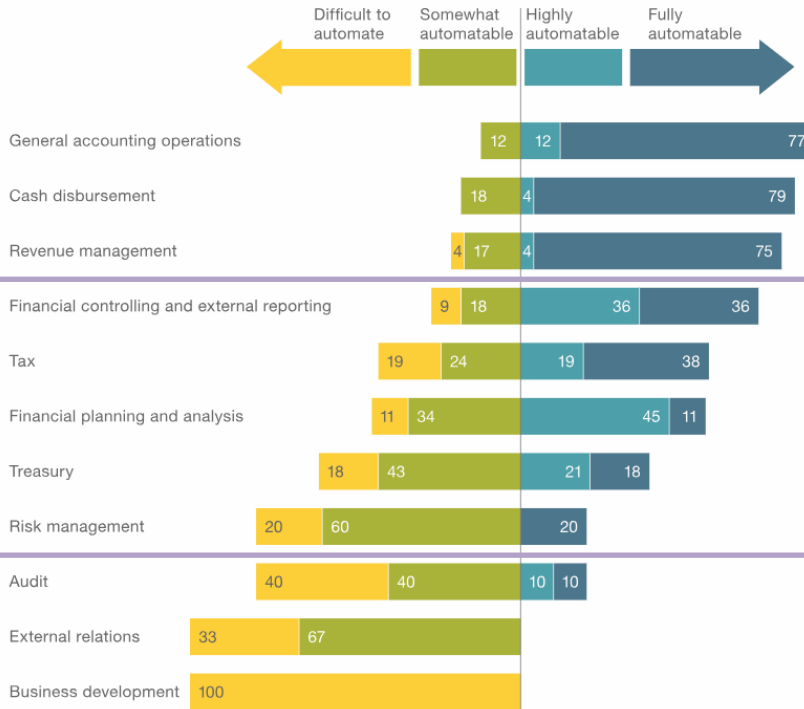
# Artificial Intelligence



Source: <https://twitter.com/oracleerpcld>

Transactional activities are the most automatable, but opportunities exist across most subfunctions.

Activities that can be automated using demonstrated technologies, %<sup>1</sup>



“Of the nine capabilities we asked about, **robotic process automation, computer vision, and machine learning** are most commonly deployed.

For each of these, at least 20 percent of respondents say their companies have already embedded these technologies into their business processes.”

Source: McKinsey, “Bots, algorithms, and the future of the finance function”

Source: McKinsey, “AI adoption advances, but foundational barriers remain”

# Machine Learning and RPA

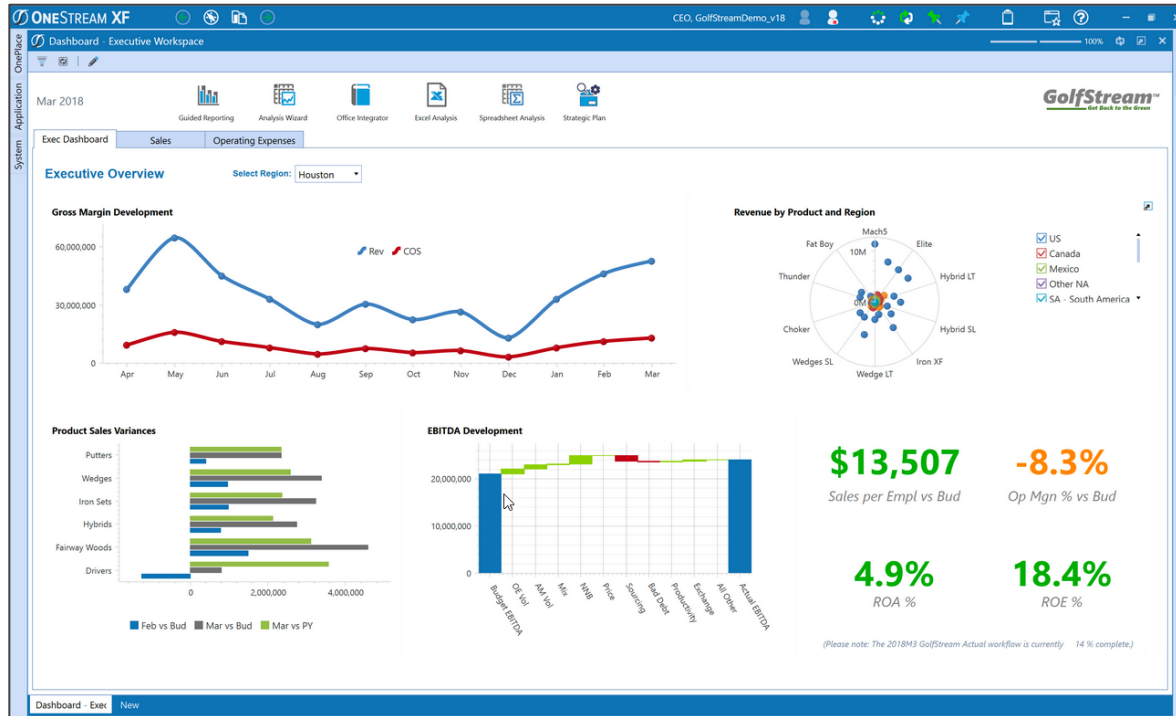
- Predictive analytics
- Narrative commentary for MD&A, external filings
- Repetitive tasks
- Performance scaling/tuning
- Natural Language Processing – voice commands
- Data anomalies – formulas, values, duplicates, missing values
- Data insights
- Automated testing

A woman with glasses and a braid is smiling while looking at a laptop in a dimly lit office. The background is dark and out of focus, showing a desk lamp and some office supplies.

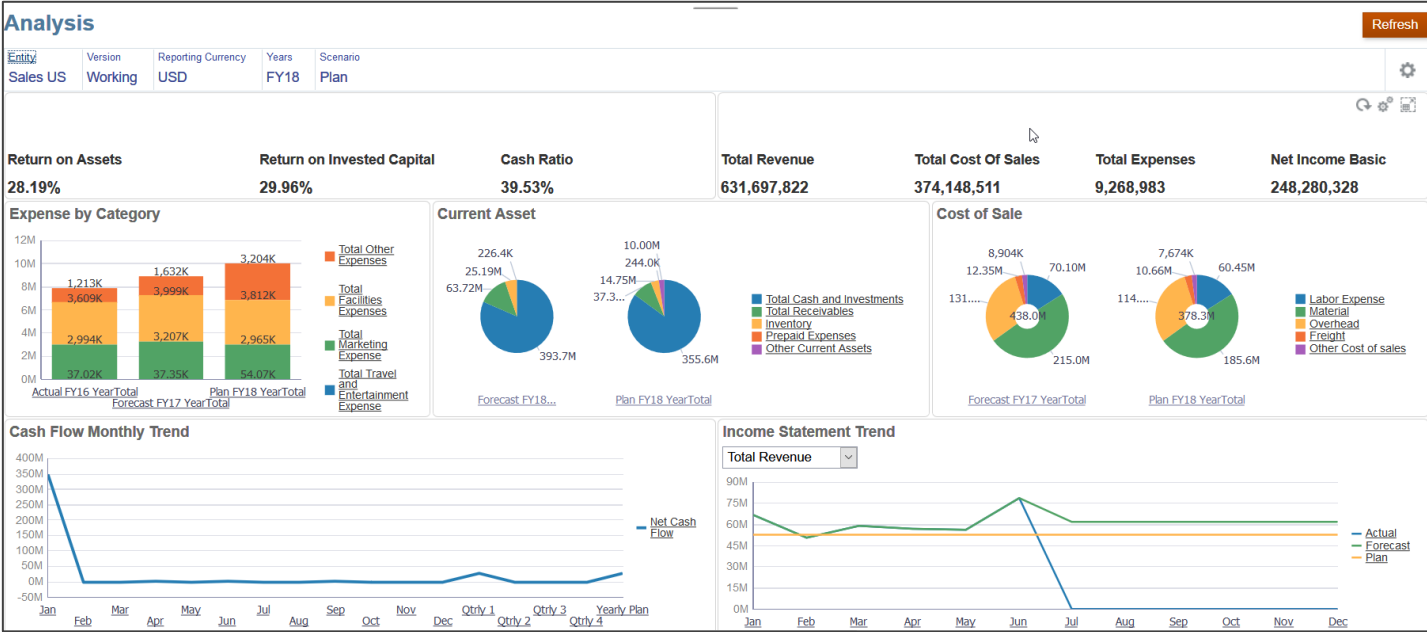
# User Experience



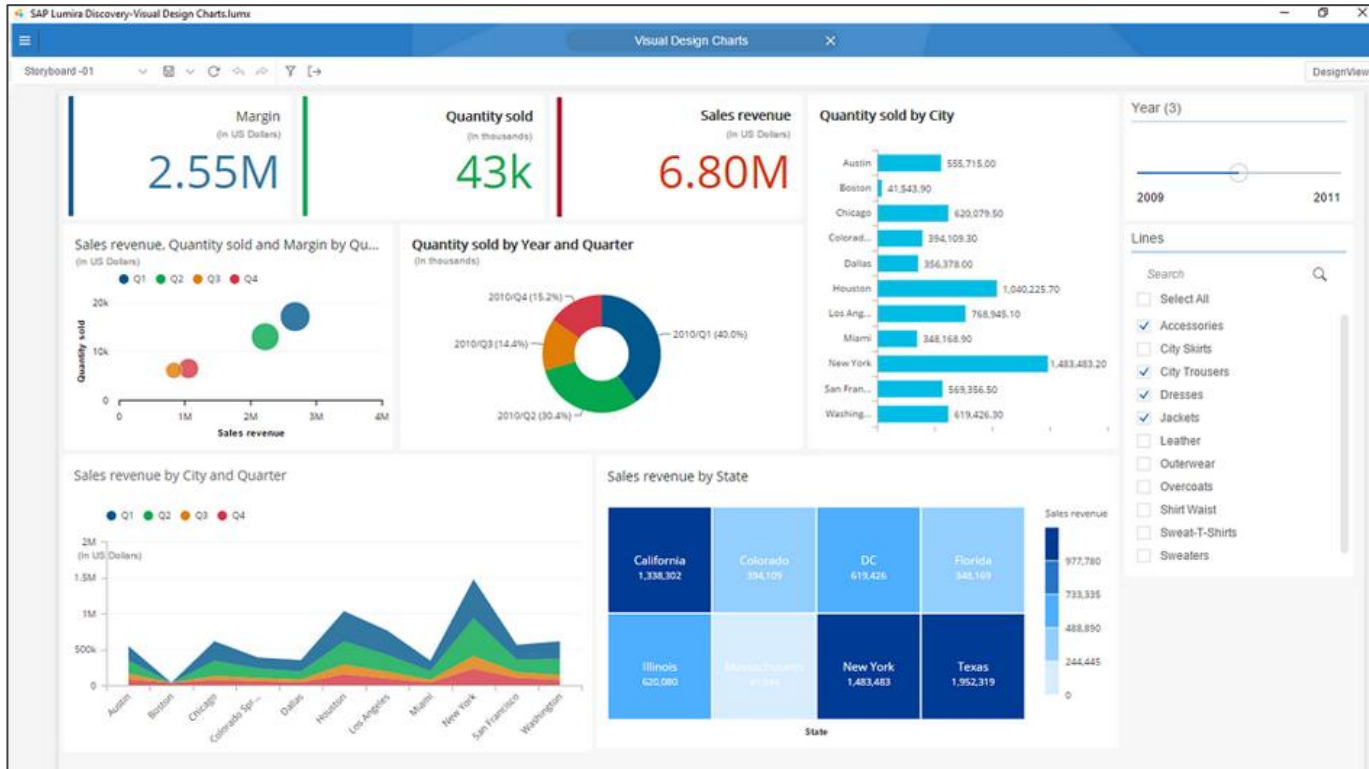
# Data Visualization



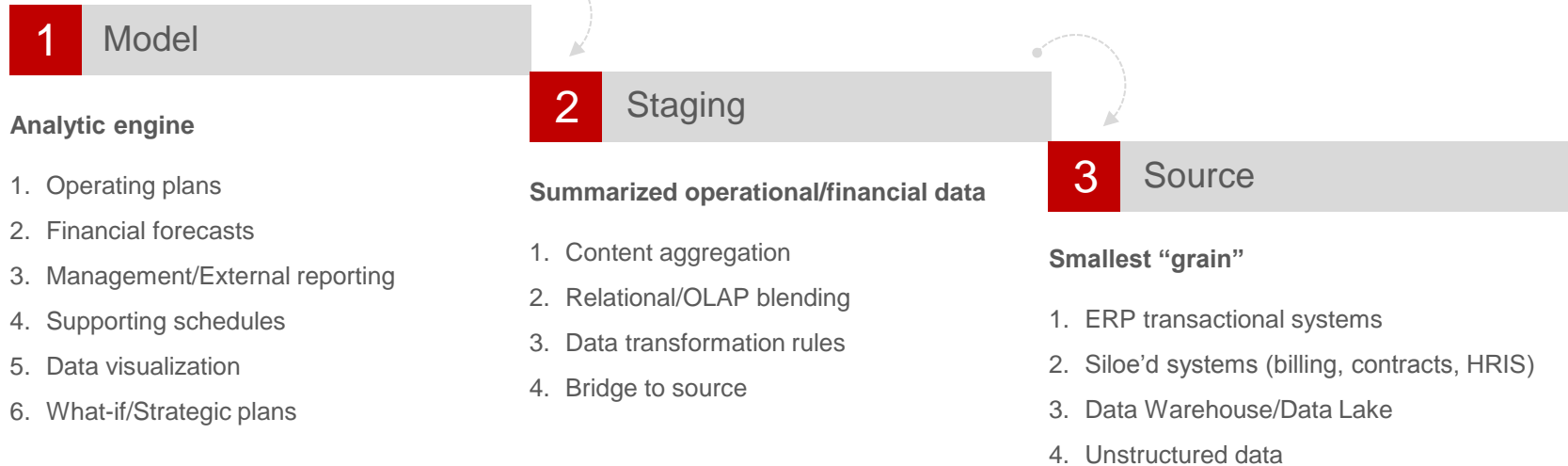
# Data Visualization



# Data Visualization



# Integration





# Enterprise Data Governance

# Enterprise Data Governance

- Validations at every level:
  - Master data request & attributes
  - Data load
  - Data mapping
  - Data entry (“combo edits,” intersection validation)
- Change history/supporting details/drill to source
- Version control
- Security audit
- Change control; regression testing

# Poll Question

**Q: If I had to choose one area of Enterprise Data Governance to improve at my organization it would be (select one):**

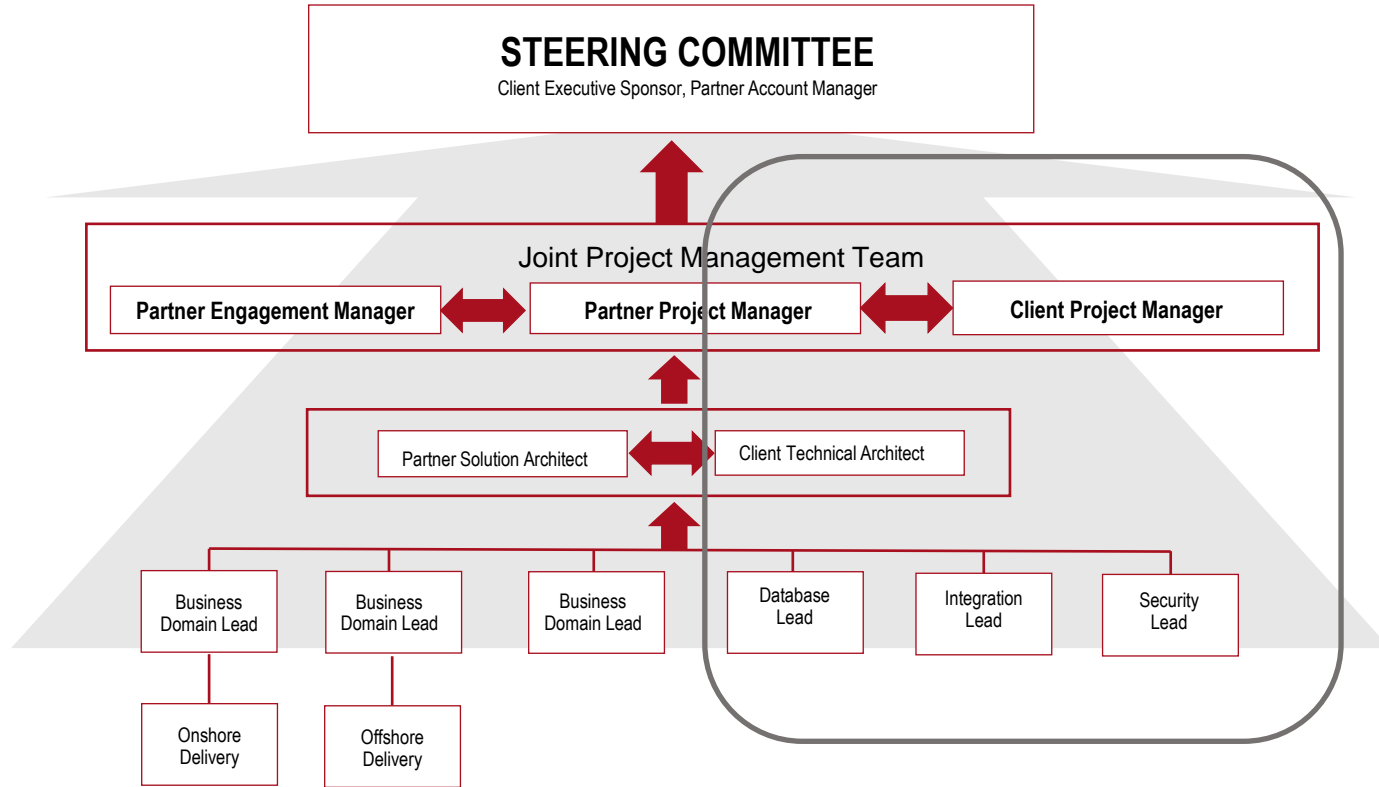
1. Creating a clear, repeatable framework for Enterprise Data Governance
2. The initiation and approval of new master data (accounts, departments, customers, employees, suppliers, etc)
3. Sharing and transforming master data across systems
4. Data completeness, alignment, and cleansing
5. Security roles, authentication, and timely access to information
6. Process automation
7. Ability to respond to internal / external audit requests



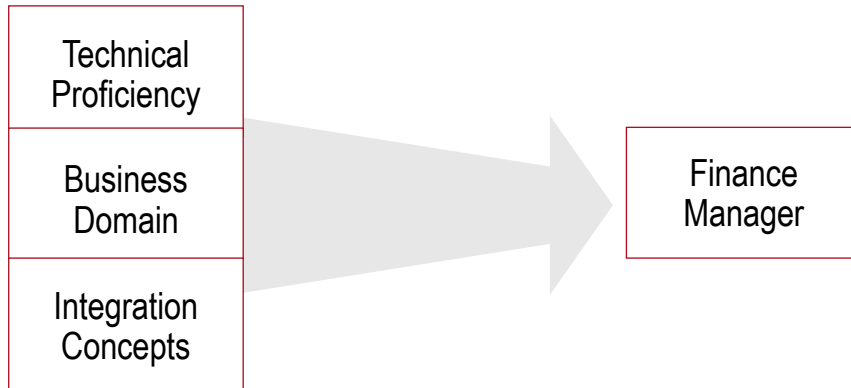
# Making “Unicorns”



# Project Execution



# New “Finance Manager”



## Job Description:

- Accounting and finance
- Interpersonal skills
- Industry knowledge
- Business process
- Data transformation
- User interface design
- Microsoft Excel
- “Numeracy”
- Technical aptitude
- Continuous learning

# Skill Development



## Subscriptions

Subscription-based delivery method. Instant access to all topics. Guided path or self-directed.



## In-Person/Virtual Class

Instructors teach students in a physical or "virtual" classroom. Attend these courses online, in real-time.




## Custom Training

Custom training for administrators or users tailored to specific, client application content

# Managed Support

## Fully Customizable



Adaptable to your business processes

## 100%

Focused CPM  
Experts

## Predictable

Get any assistance  
on a fixed budget

## High Touch

Designated, Familiar  
Contacts

## 100%

Onshore Leads

## Personalized Attention



No Large Call Center | Implementation History  
Knowledge of Your Environment

A photograph of three business professionals in a meeting. A man in a white shirt and glasses is pointing at a laptop held by another man. A woman in a dark suit is looking at the laptop. The image is dimmed and has a dark overlay.

# CPM Beyond Finance

# Poll Question

**4. We are actively using our CPM suite to support the following departments/functions (check all that apply):**

1. Strategy and finance
2. Sales and marketing
3. Product or service development
4. Human resources
5. Procurement and supply chain
6. Information technology
7. Other services

# Solutions



- HR: Labor costing, total compensation reporting
- Procurement: Strategic sourcing
- Sales and Marketing: Industry analytics, campaign effectiveness
- Operations: Production planning, store/machine ramping
- IT: Project portfolio management, costing, contract labor, asset management



**Questions?**