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Driving Management Excellence

Oracle's Enterprise Performance Management System

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The Growing Need for Enterprise Performance Management

The time is right: companies that focus on achieving management excellence can gain a competitive advantage. And Oracle's enterprise performance management (EPM) system is helping them succeed.

Many organizations worldwide have successfully optimized their business processes by using enterprise resource planning (ERP) and other applications. They have achieved high levels of operational efficiency and are able to respond more rapidly, deliver higher quality, and improve cost efficiency. However, as more businesses improve their operational excellence, market-leading organizations must look elsewhere to achieve competitive differentiation—to management excellence. Your business can gain an edge by developing the three pillars of management excellence: being smart, agile, and aligned.

Smart: Most organizations have access to ample data on both the market and their internal operations. The competitive difference comes from the analysis, interpretation, and actions based on this data. You can gain a strategic advantage by finding patterns and opportunities earlier and with deeper insight than your competitors.

Agile: To be useful, insight must be turned into action. Successful organizations are those that can rapidly adapt to changing circumstances. As global competition and new technology developments impact the marketplace, you must be able to integrate and process new information and systems quickly to gain an advantage.

Aligned: Technology has dramatically decreased transaction and communication costs, letting organizations outsource many activities and develop tightly integrated value chains. Pervasive sharing of information and intelligence is critical to achieve alignment of both internal and external resources. To succeed in today's world, you need to foster collaboration and communication across your extended enterprise.

How will you help your company achieve management excellence?

"Traditionally, financial analytic applications have been treated as separate but equal from other operational BI initiatives. This inside-out view limited each group's vision of enterprisewide performance management. As organizations take an outside-in perspective of organizational execution by connecting the dots between operational and financial performance and value creation, they soon recognize the next logical step is to establish a pervasive PM strategy that encompasses the entire organization along with its value network."

John Hagerty, AMR Research, *CPM Market Landscape: Office of the CFO Is Hot Again*, 2007

Oracle's Enterprise Performance Management System

The Need for EPM

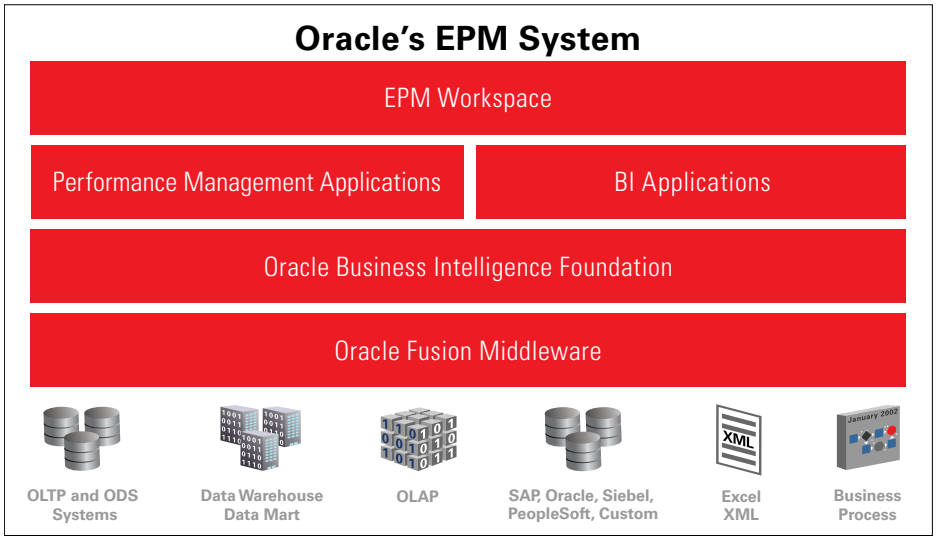
Decision-makers struggle with performance management challenges everywhere in the enterprise. Here are the EPM challenges they typically face.

- Senior executives—Seek to align the goals and objectives of all stakeholders
- Line managers—Must align individual and departmental objectives with corporate goals
- Financial executives—Must achieve compliance and transparency
- Information workers—Need immediate access to critical business information
- IT executives—Must meet increasing end-user demands and innovate at minimal cost

Drive Management Excellence

To achieve management excellence, organizations need to standardize, automate, and integrate their management processes and implement the right software solutions to optimize them. While ERP and other business applications can be used to optimize operational processes, EPM systems are needed to fully optimize your management processes.

Management excellence requires an integrated set of performance metrics and management processes, so you can link strategic scenarios to your financial and operational management. A single connected system can enable this integration by providing "one version of the truth"—a common, aligned view into datasources across all financial and operational management processes. This integrated view can support scenario modeling and what-if simulations to deliver insight and the ability to optimize resources. It also empowers executives, advanced users, and line managers by giving them the information and analytic capabilities they need to make more-intelligent decisions that increase agility.



Oracle's EPM system brings together your company's performance management information from various datasources, business intelligence applications, and financial performance management applications and delivers it directly to the desktop of your decision-makers—enabling strategic "insight to action."

Fact: Oracle now leads the corporate performance management (CPM) market with 28 percent of the world-wide market share for CPM suites.

(Gartner Dataquest: *Market Share: CPM Suites Software, Worldwide, 2006, Composite View,* August 2007)

One Performance Management System

Oracle delivers that single, integrated system. Oracle's EPM system includes a suite of performance management applications, a suite of business intelligence (BI) applications, a common foundation of BI tools and services, and a variety of datasources—all integrated using Oracle Fusion Middleware. Easy to use, easy to manage, and the lowest in cost to deploy, it's the most comprehensive and flexible EPM system in the marketplace today.

In fact, thousands of organizations around the world are using Oracle's EPM system to define their strategy and objectives; coordinate planning to meet those objectives; consolidate and analyze enterprisewide information; monitor performance against plans; and deliver the insights to drive the best decisions, actions, and processes throughout their enterprise. Using the Oracle approach, they can align decisions with strategic goals, reduce financial reporting and planning cycles, compare operational results to plans in real time, and drive decisions from "insight to action" with lower costs and less complexity than nonintegrated solutions.

Take a look at what's inside the system and what it can do for you.

Most Comprehensive Suite of Performance Management Applications

A modular suite of integrated solutions, Oracle's performance management applications support a broad range of strategic and financial performance management processes to enable management excellence. This comprehensive, market-leading suite drives profitable growth by delivering predictable results, improving transparency and compliance, and increasing business alignment.

In addition, Oracle's performance management applications leverage Oracle's Business Intelligence foundation and Oracle Fusion Middleware to integrate data from multiple sources and provide dashboards, reporting, and analysis. The modules can be deployed out-of-the-box, extended with Oracle BI technologies, or tailored to meet specific needs. By providing a holistic view of your business, these applications help you increase speed and agility, improve your decision-making abilities, and enhance corporate performance.

Oracle's Performance Management Applications

Supporting a broad range of strategic and financial performance management processes, the performance management applications in Oracle's EPM system include

- Oracle Hyperion Financial Management
- Oracle Hyperion Planning
- Oracle Hyperion Performance Scorecard
- Oracle Hyperion Strategic Finance
- Oracle Hyperion Capital Asset Planning
- Oracle Hyperion Workforce Planning
- Oracle Integrated Operational Planning
- Oracle Hyperion Profitability and Cost Management
- Oracle Crystal Ball
- Oracle Hyperion Financial Data Quality Management
- Oracle's Hyperion Enterprise

Fact: Oracle's closest competitor in the corporate performance management (CPM) suite market has less than half of Oracle's market share, with only 10.9 percent.

(Gartner Dataquest: *Market Share: CPM Suites Software, Worldwide, 2006, Composite View,* August 2007)

Fact: Oracle is the leader in the business analytics industry with US$2.7 billion in software revenue for 2006.

(IDC: *Worldwide Business Analytics Software 2007–2011 Forecast Update and 2006 Vendor Shares,* September 2007)

Most Complete Suite of Business Intelligence Applications

"Hyperion Essbase [now called Oracle Essbase] has provided me with the tools to study our financials from many different angles. It enables deeper analysis of the results of each business unit and the region as a whole."

Jeroen Potjes
Chief Financial Officer, ING Asia/Pacific

Oracle's EPM system also includes Oracle Business Intelligence applications. These are complete, prebuilt BI solutions that help everyone in your organization—from frontline employees to senior management—understand how the business is performing, resulting in better decisions, confident actions, and efficient operational management processes. They provide a single, integrated view of enterprise information, for greater insight and alignment across business functions.

Oracle Business Intelligence applications address analytic requirements across a wide range of functions—from sales and marketing to finance and human resources, order management and fulfillment, supply chain, service, and contact center analytics. They're also tailored to meet the unique needs of different industries, addressing important industry issues such as customer-churn detection in telecommunications, fact-based selling and trade promotion performance in consumer goods, customer value and "share of wallet" in financial services, or physician and product opportunity identification in pharmaceuticals. Based on best practices, these solutions help organizations gain greater insight and value from a variety of datasources and applications, including Oracle E-Business Suite, Oracle's PeopleSoft, and Oracle's Siebel, as well as other systems, such as SAP R/3.

Oracle Business Intelligence applications are built on Oracle Fusion Middleware and Oracle Business Intelligence foundation, delivering a comprehensive, innovative, and leading BI platform that lets you benefit from the rapid deployment, reduced cost of ownership, and built-in best practices of a packaged BI application, with the ability to easily extend the solution to meet specific needs or even create custom-built BI applications—all on a common BI foundation.

Oracle's Business Intelligence Applications

Oracle's complete, prebuilt BI solutions deliver intuitive, role-based intelligence for everyone in an organization—to enable better decisions, confident action, and efficient operational processes.

- Oracle Financial Analytics
- Oracle Human Resources Analytics
- Oracle Procurement and Spend Analytics
- Oracle Supply Chain and Order Management Analytics
- Oracle Sales Analytics
- Oracle Marketing Analytics
- Oracle Service Analytics
- Oracle Contact Center Telephony Analytics

A Comprehensive Business Intelligence Foundation

Oracle Business Intelligence foundation features best-in-class technology for reporting, analysis, and packaged applications. Based on an integrated, scalable, Web-native architecture, the unified and open Oracle Business Intelligence foundation reduces your cost of ownership, offers efficient access to information from heterogeneous sources, and provides an enterprise semantic layer with multiple channels of information delivery, to support self-service, pervasive BI, and management excellence.

"With Oracle's business intelligence solution, we were able to deliver more than 400 reports to a large organization with just one person—now that's cost effective."

William Duffy, Data Warehouse Project Manager, Pitney Bowes Inc.

Pervasive

With Oracle Business Intelligence foundation, all business users have timely, accurate, and role-relevant insight, regardless of where the underlying data resides. Oracle's enterprise information model insulates business users from having to understand source systems, instead providing them with a logical (business) view of information that allows them to get the information they need on a self-service basis. It also ensures all metrics, calculations, hierarchies, and business rules are consistent across all BI tools and applications. Oracle's BI server provides efficient, high-performance, transparent access to heterogeneous relational and multidimensional datasources. Oracle Essbase (formerly Oracle's Hyperion Essbase), a best-in-class online analytical processing (OLAP) server, enables calculation-intensive, analytic applications (such as customer profitability analysis), speed-of-thought, multidimensional data exploration, and predictive analytics.

Comprehensive

Oracle provides the broadest range of best-of-breed reporting and analysis capabilities in an integrated set of products. Oracle supports multiple channels of information delivery that include enterprise reporting, ad hoc query and analysis, interactive dashboards, financial reporting, Microsoft Office, desktop gadgets, proactive notifications and alerts, mobile and disconnected dashboards, BI embedded in applications, and OLAP analytics. The result: relevant and timely access by the right people, at the right time, in the right form.

Hot-Pluggable

Oracle helps customers maximize the value of their existing IT investments and resources while expanding their use of business intelligence applications. With Oracle Business Intelligence foundation, you can leverage your investment in SAP, Oracle E-Business Suite, Oracle's Siebel, Oracle's PeopleSoft, Oracle's JD Edwards, and other transactional applications via certified adapters and extract, transform, and load (ETL) mappings. You can access data in any relational and multidimensional source, including IBM DB2, Teradata, Microsoft SQL Server, Oracle Database, SAP BW, Oracle's Hyperion applications, and Oracle Essbase. In addition, you can leverage your existing ETL technologies, including Informatica, Ascential, Oracle Data Integrator, Oracle Warehouse Builder, and others. Oracle also preserves your investments in security and authentication technologies such as LDAP, MSAD, Oracle Identity Management, and more.

Oracle's EPM system supports a broad range of strategic, financial, and operational management processes. This complete and integrated system lets you manage and optimize your enterprisewide performance and drives management excellence.

Oracle Business Intelligence Foundation and Data Warehousing Products

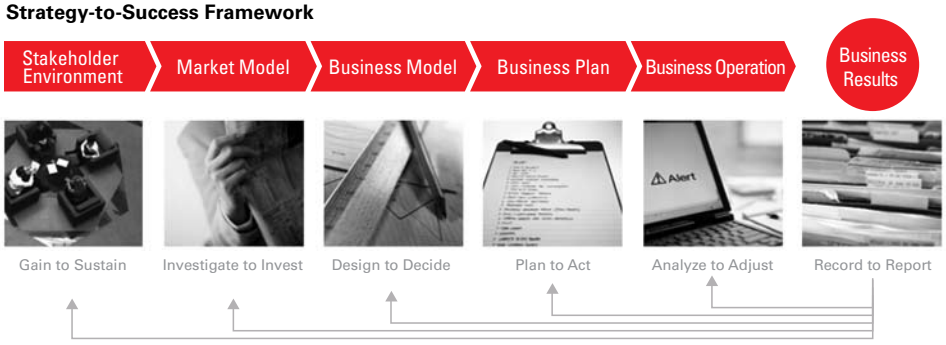
Oracle's analytic capabilities are based on category-leading products that provide online analytical processing (OLAP) interactive dashboards, ad hoc analysis, proactive detection and alerts, advanced reporting and publishing, mobile analytics, and more. And Oracle data warehousing products offer fast, reliable, and secure reporting; online analytics; and data mining on data warehouses that can scale at low cost.

- Oracle Business Intelligence Suite Enterprise Edition Plus
- Oracle Business Intelligence Standard Edition One
- Oracle Business Intelligence Standard Edition
- Oracle Essbase
- Oracle Warehouse Builder
- Oracle Partitioning
- Oracle OLAP
- Oracle Data Mining

Fact: Forrester expects the business performance solutions market to grow at a healthy 11 percent rate through 2010, resulting in a US$1.4 billion market.

(The Forrester Wave: Business Performance Solutions, Q4 2007)

Strategy-to-Success Framework



Leveraging the capabilities of Oracle's EPM system, Oracle is pioneering a series of integrated management processes designed to help organizations achieve management excellence. As illustrated above, this framework has six core processes and is called "Strategy to Success."

"With Oracle's prebuilt analytic solutions for sales, marketing, and service, we were able to deploy a powerful BI solution in less than three months. Verizon Business employees across the enterprise are now empowered with relevant, complete information tailored to their role."

Rob Moore
Executive Director, Verizon Business

Oracle Fusion Middleware

Oracle's EPM system is supported by Oracle Fusion Middleware and Oracle's market-leading database technologies. A comprehensive, standards-based family of middleware products, Oracle Fusion Middleware enables customers to adopt and manage service-oriented architectures (SOAs) in heterogeneous computing environments.

The more than 50,000 customers now using Oracle Fusion Middleware include leading organizations in the financial services, telecommunications, manufacturing, retail, pharmaceuticals, healthcare, and public sector industries. Oracle Fusion Middleware is also supported by 9,000 partners, including market-leading independent software vendors, value-added resellers, and system integrators.

Supported by Oracle Fusion Middleware and Oracle Database Technologies

Oracle's enterprise performance management system is supported by Oracle Fusion Middleware and Oracle's database technologies. Oracle Fusion Middleware is a comprehensive family of products that ranges from application development tools and data integration solutions to master data management, identity management, collaboration, workflow, secure search, and data warehousing technology. It provides the critical software foundation you need to ensure corporate growth, insight, and control. With Oracle Fusion Middleware, you can leverage your investment in Oracle or any other vendor to make better decisions, secure sensitive information, streamline compliance initiatives, and mitigate risk. And because Oracle Fusion Middleware is modular and integrated, you buy only what you need, when you need it.

Oracle's Enterprise Performance Management System Benefits Your Business

Oracle's EPM system delivers consistent visibility into past, current, and future business operations, so you can confidently plan and trust the reliability of your reports and forecasts. This visibility enables "insight to action" for improved performance and increases the overall health of your organization as you set and meet shareholder expectations.

Oracle's performance management applications help you improve transparency, enhance compliance, and mitigate business risk through integrated process control and consistent planning, financial consolidations, reporting, and scorecarding. You'll get shorter, more-predictable cycle times for financial closing and planning, increase forecast accuracy, and reduce risk by eliminating spreadsheet errors. Plus, you'll be able to effectively link strategies to plans and continuously monitor execution, so you gain business alignment, improve decision-making, and optimize your resources.

Oracle Business Intelligence foundation gives line managers timely, accurate financial and operating results for improved transparency, visibility, and decision-making. With an easy-to-learn-and-use environment for self-service reporting and analysis, you gain the most comprehensive set of BI capabilities in one platform. Oracle Business Intelligence foundation

"For a global organization like ours, having one view of the truth is critical. Hyperion Planning – System 9 [now called Oracle Hyperion Planning] is our global budgeting and forecasting tool that allows us to predict and analyze our spending companywide. Even across different time zones and cultures, everyone stays on the same page, with no need to e-mail spreadsheets back and forth."

Janis O'Bryan, Chief Information Officer, Hudson Advisors

addresses any type of reporting and analysis requirement—from interactive dashboards to structured operational and financial reports, ad hoc queries, and advanced OLAP analysis—all within a single environment. And these tools seamlessly integrate with and enhance the use of Microsoft Office.

Oracle's BI applications give business managers a single, accurate view that provides them with timely, meaningful insight into business performance and better alignment with business goals. Thus, managers can identify performance gaps and take action in time to affect results. With guided analysis and role-based intelligence, you can improve decision-making and business agility and increase customer satisfaction.

Finally, Oracle's EPM system increases user productivity through a common EPM workspace that gives users role-based access to all elements of their enterprise performance management solution—performance management applications, BI applications, and BI tools.

Oracle's Enterprise Performance Management System Delivers Real IT Advantages

Oracle understands the challenges facing IT organizations. Every business today runs on multiple software solutions, systems, and platforms. The costs in resources, budget, and time for administration alone can be staggering and difficult to control. And often, even if organizations do standardize their operational systems, new systems are soon introduced via acquisitions or integration initiatives with suppliers and other partners in the value chain.

With its EPM system, Oracle delivers a better way. Its scalable, standards-based, hot-pluggable business intelligence foundation not only integrates with your existing transaction and enterprise resource planning (ERP) systems, data warehouses, and other sources, it complements and extends your current IT infrastructure investments. You can reduce your total cost of ownership by simplifying systems management, administration, and support with a single, unified system. And with the embedded industry and functional best practices delivered by Oracle's packaged applications, you'll deploy solutions quickly and reduce time to value.

"Hyperion Financial Management – System 9 [now called Oracle Hyperion Financial Management] lets us extend data entry capabilities to every country. Every unit can now enter its own data into the system."

Heikki Kemola
Project Manager, Kesko Corporation

Oracle Business Intelligence Foundation

The most comprehensive set of BI capabilities in one platform, Oracle Business Intelligence foundation gives IT organizations

- An easy-to-learn-and-use environment for self-service reporting and analysis
- A way to address all reporting and analysis requirements—from interactive dashboards to structured operational and financial reports, ad hoc queries, and advanced OLAP analysis—within a single environment
- Solutions that integrate with and enhance your use of Microsoft Office
- Timely, accurate financial and operating results for improved transparency, visibility, and decision-making

"Deploying [Oracle's] Hyperion as its business performance management system has enabled Symantec to unify its processes for business planning and forecasting and provide a central source that all employees can access for operational data. The solution has streamlined the financial reporting process, enabling Symantec to grow without hiring additional staff and reduce the potential risk of financial noncompliance."

Nucleus Research, Symantec ROI Study, March 2006

Delivering a Complete Solution: Oracle Services

Oracle's enterprise performance management system—and all Oracle products—are backed by a global team of experts who provide comprehensive implementation, support, and education services to accelerate your return on investment. Expert technical consultants with extensive product knowledge can design and deploy a range of software solutions to meet your business requirements. Technical support analysts are ready to help you troubleshoot and resolve your day-to-day challenges promptly and effectively. And skilled course developers and instructors are available to educate all levels of your staff, enabling optimum performance, increasing productivity, and encouraging long-term expertise.

You'll further reduce your costs by eliminating redundant tools from multiple vendors and controlling software license and maintenance costs. Oracle's EPM system provides a consistent source of information and change control across the enterprise through centralized analytic master data management, data quality management, and data integration tools. Its modular architecture facilitates a "start anywhere" approach, so you can address your immediate needs first, then add additional capabilities as your business grows and your budget allows. And its flexibility and extensibility let you customize applications if you need to address unique requirements.

Oracle's Enterprise Performance Management System—Far Ahead of the Pack

Since the enterprise software industry began recognizing the value of better performance management, many vendors have jumped on the performance management train. But Oracle leads the market by embracing a comprehensive approach to enterprise performance management. With Oracle's EPM system, Oracle delivers the first and only performance management system that integrates leading performance management applications and BI applications with broad reporting and analysis functionality, giving you an integrated system with a single user view and shared services. The system enables you to reduce your risks and costs while increasing user and developer productivity. The capabilities you get from Oracle's EPM system are unique—and only Oracle offers them in a comprehensive end-to-end system that drives management excellence.

CONTACT US

For more information on how your business can benefit from the power of Oracle's enterprise performance management system, please visit **oracle.com/solutions/business_intelligence** or call **+1.800.ORACLE1** to speak to an Oracle representative.

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