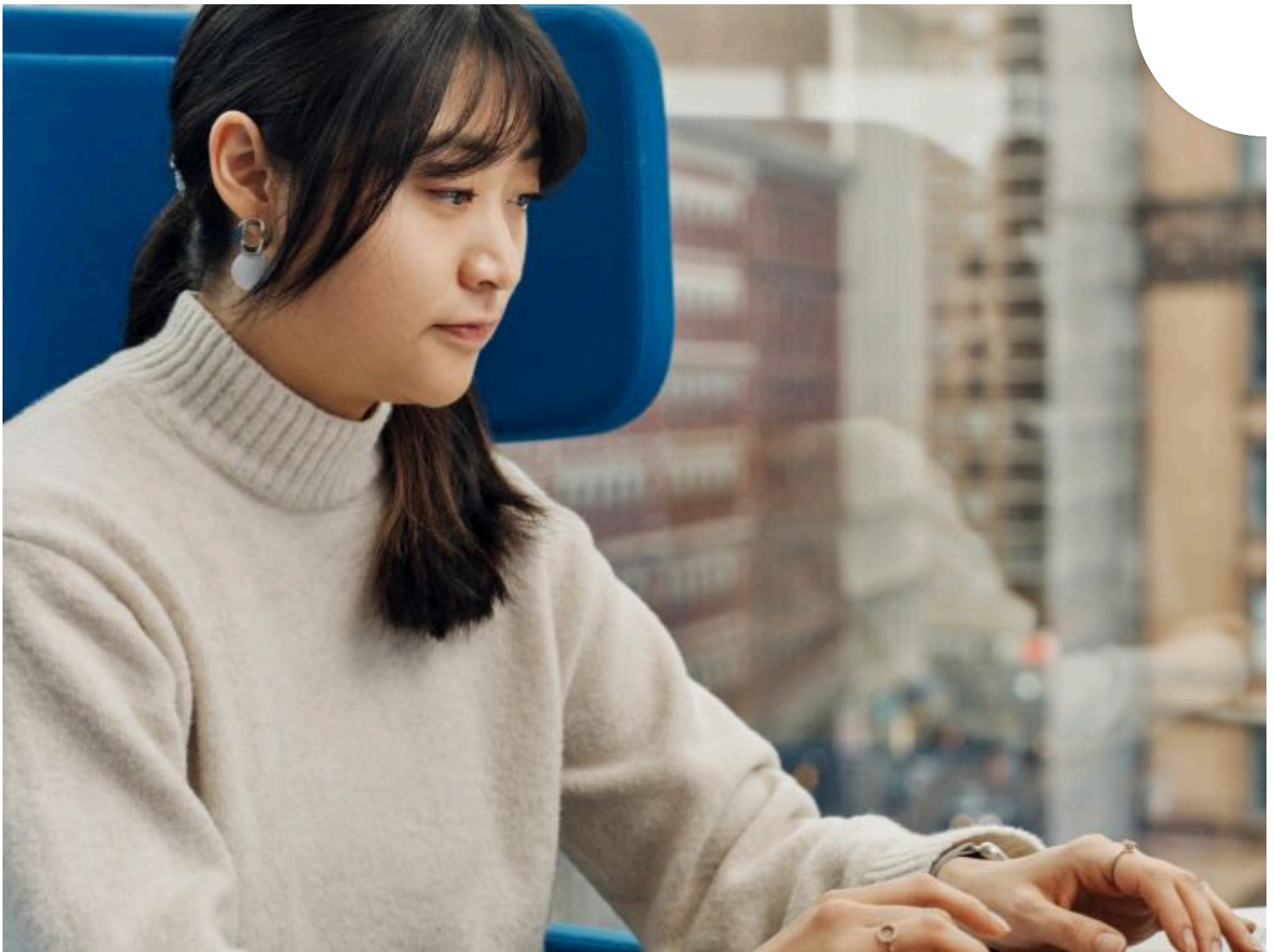


Transform team prod with ease

IBM automates journal entries with
watsonx Orchestrate, watsonx.ai and
Apptio EBM to drive fast, accurate
outcomes

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Overburdened with manual journal entries

The finance team at IBM began addressing a long-standing challenge around journal entries a few years ago. At the time, the process was highly manual, repetitive, and time-consuming—requiring data collection from multiple sources, manual checks to minimize errors, especially during peak financial periods, a significant burden on analysts and required ongoing support. Initially, the team implemented robotic process automation for key portions of the workflow. Building on that foundation, the team launched the Jobotx initiative in 2024, expanding automation capabilities using IBM® watsonx Orchestrate™

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and IBM Apptio™ Enterprise Business Management (EBM). These tools addressed persistent issues like inconsistent data validation, cycle time delays and scalability. By combining AI, RPA and cost-based automation prioritization, IBM began standardizing and accelerating journal processing across regions in a more intelligent and adaptable way.

90%

>90% reduction in cycle time possible

USD 600K

An estimated USD 600,000 in annual cost savings projected

Shifting focus to more strategic work with IBM watsonx Orchestrate

The IBM finance team used IBM Apptio EBM to analyze full year ledger data and identify automation opportunities, then leveraged watsonx.ai® to build custom AI models for root cause analysis. They then deployed IBM watsonx Orchestrate and integrated it with robotic process automation (RPA) to validate inputs against the ledger, optimize process steps and generate journal data for review.

Additionally, the solution was extended to include real-time anomaly detection to improve the accuracy of financial records before submission. The AI-powered, customized automation models in Jobotx enabled dynamic adaptation to changing financial policies.

The IBM finance team and the Jobotx team of IBM together moved manual steps of journal entry to the watsonx Orchestrate platform. IBM watsonx Orchestrate to streamline operations, make informed decisions with AI-powered insights and drive growth in a secure and scalable environment. Watsonx

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Orchestrate then interpreted these inputs and converted them into precise RPA commands. Upon approval by the finance manager, watsonx Orchestrate scheduled automated commands for journal submission to the ledger during financial close. The solution also worked well with IBM Business Automation Workflow to deliver a dynamic, real-time dashboard, empowering finance analysts to execute timely exception management.

Implementing the solution in early 2025 enabled the IBM finance team to increase accuracy while freeing up time for more strategic work and improving overall efficiency. As part of the Jobotx initiative, the team will continue to refine automation accuracy, integrate the platform with additional enterprise resource planning (ERP) systems and expand AI-driven insights for finance teams globally.

Improving the overall efficiency of financial operations

The IBM finance team successfully automated their journal entry process by leveraging models on watsonx.ai, resulting in significant time and cost savings. With the new system, finance analysts can now focus on more strategic tasks. Additionally, the team has seen a reduction in errors and an improvement in overall efficiency.

According to the finance team, “By automating tedious workstreams with watsonx Orchestrate and leveraging AI-driven insights from Jobotx, we are now able to free up our employees’ time to focus on more strategic work and their own development, while also improving the overall efficiency of our operations.”

The team has also observed the following benefits during the initial 3 months of implementation:

- **Estimated >90% reduction in cycle time**

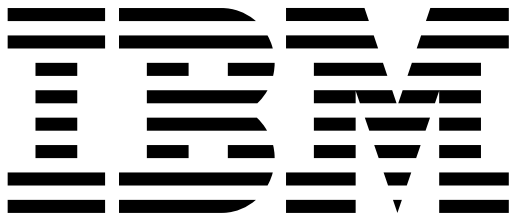
With end-to-end process automation, cycle times for reconciliation were projected to be cut by more than 90%. What previously took days or even weeks is now completed in hours, bringing real-time visibility and facilitating faster decision-making.

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- **Estimated USD 600,000 in annual savings**

By replacing legacy systems with an AI-powered finance automation solution, the company could potentially achieve an estimated annual cost savings of approximately USD 600,000. These savings stemmed from reduced operational costs, improved process efficiencies and a decreased reliance on manual work.

Looking ahead, the finance team plans to continue leveraging AI and watsonx.ai to automate other business processes and improve overall productivity. Expansion plans also include deep integration with additional financial applications and extending AI capabilities to cover risk assessments and compliance monitoring.



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Solution components

IBM® watsonx.ai™

IBM watsonx Orchestrate™

IBM Apptio™

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