

Case Study in Aligning Enterprise Systems and Processes with FP&A

Presented by:

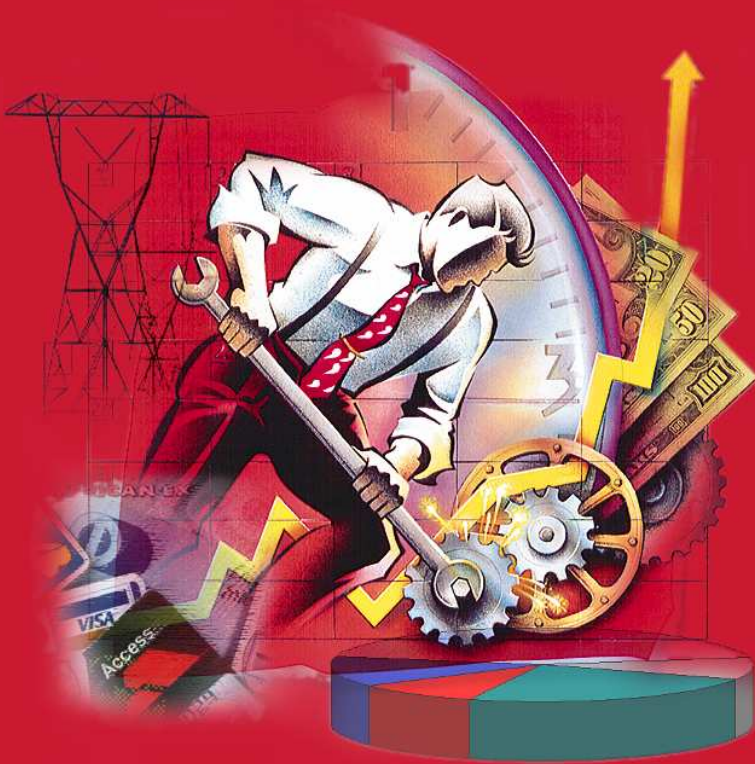
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Case study linking ERP and FP&A

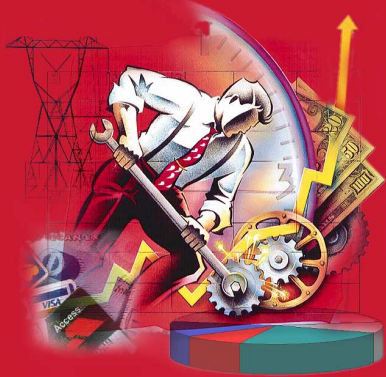
Client Challenge:

“How do we improve and tightly couple our financial and operational processes with our financial planning and analysis activities?”

Initial Assessment:

- Not fully leveraging the capabilities of both Oracle and their FP&A / Reporting Systems.*
- Processes were efficient, but experiencing low effectiveness across the organization*
- No single source of truth, lots of spreadsheets*
- Policies and processes not always understood or followed - resulting in missing data*
- KPIs not tracked or used at the operational level on a timely basis*

Together, we agreed to take the following approach...



- *Start by developing and/or confirming the business vision and process objectives*
- *Understand and measure existing processes and identify the processes that need improvement including all the people, process, and technology levers*
- *Develop and deploy improved processes with measurable metrics to quantify the optimization achieved and link to daily operations*

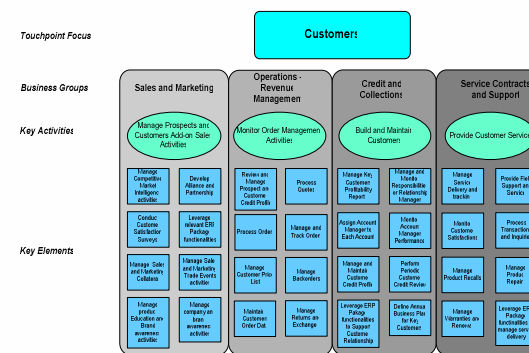
These are the 5 steps we used for this engagement

5. Recognize that “Best Possible” performance is an on-going effort

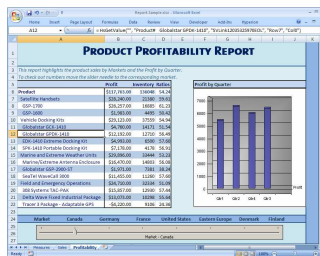


1. Build current / future state processes flows and metrics

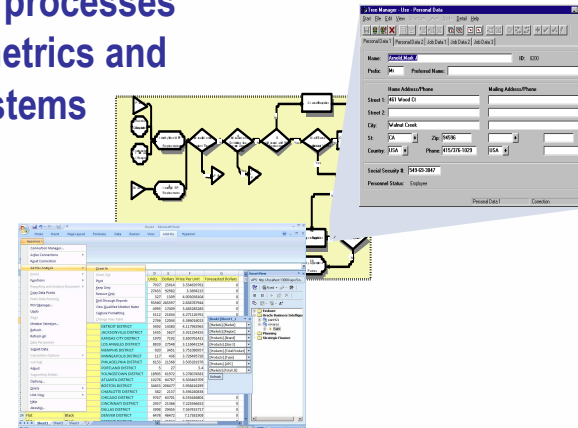
Best Practice Process Alignment (B²P²A)



4. Develop consensus to prioritize improvement initiatives



2. Map the processes to FP&A metrics and related systems



3. Conduct rapid prototyping and user sessions for early buy-in and adoption

An iterative approach ensures business improvements are adopted by all stakeholders.