jedox. Simplify Planning | **Microsoft 365**

Unify Planning Across Your Organization

360° Planning

The move from Financial to
Extended Planning & Analysis

The finance department is at the very core of business. Everything boils down to finance. For example, if your marketing department is not generating a sufficient number of leads today, your enterprise will experience sales problems a few months down the line, which, in turn, will likely have a negative impact on revenue.

So how do you operationally measure the performance of multiple processes across the enterprise, effectively detect trends and problems before they impact the bottom line? And what is the best path to a unified, extended strategy for finance that enables better insights and better decisions across the organization? This is where Extended Planning & Analysis comes in.

Extending the power of planning and analysis

Financial Planning & Analysis (FP&A) provides organizations with vital planning, budgeting, and forecasting abilities, so important strategy decisions can be made. Extended Planning & Analysis (xP&A) gives operational departments the same power – and more. With xP&A, the power of FP&A can be extended to every department to create continuous, company-wide plans that are more comprehensive, more agile, and more accurate. A solid data foundation provides the basis for collaborative, unified planning that extends way beyond the finance office and enables 360° planning.

With xP&A, the FP&A planning practice of using financial, non-financial and external data is extended to departments beyond finance. xP&A helps you to overcome traditional boundaries, bridge performance management gaps, and benefit from richer context to numbers. xP&A can deliver a more comprehensive picture of performance across the board.

The Big Picture

When planners across departments can collaborate using a single, unified data foundation, they will be able to see and understand how activities across functions impact one another. This allows departments to identify opportunities, discover "white spots" in the business landscape, and more clearly see the domino effect of their decisions. Better decisions and better insights across the organization are the result.

New xP&A

> Continuos, Real-time Planning & Forecasting
> Granular Operational Models & Solutions
> Platform for Strategic, Financial & Oprational Planning
> Driver-based Simulations, Scenario Planning
> Augmented with Predictive Forecasting & ML

xP&A empowers modern finance to drive transformation

There are multiple benefits to implementing an xP&A strategy. It integrates financial with operational and strategic planning for a more holistic view of your complete enterprise. This enables you to **achieve more – faster and more accurately** than ever before, e.g. continuous planning, a comprehensive view of performance, organizational alignment, cross-functional orchestration, and more. **A shift to xP&A drives business value**.

Evolving from Financial to Extended Planning

Moving from departmental data silos and disparate systems to integrated and extended planning eliminates inconsistent planning and forecasting that can contribute to a lack of transparency. xP&A makes such a difference because it enables you to unify financial and operational planning processes by **with a single solution**. Planning silos can be eliminated, and **unified planning across departments** becomes a reality.

Jedox delivers just that: It **unifies data from across the enterprise** and enables seamless data integration for ERP/GL, CRM, HR and other key enterprise systems in the cloud or on-premise. And it gives you a **competitive advantage in a fast-moving world**.

The need for speed

In traditional business models, planning was typically done quarterly. Today, in the digital, fast-changing world, this is insufficient for supporting increased agility and resilience for organizations. Data volumes continue to increase. In light of uncertain local and global markets, worldwide supply chains and fierce competition, you must be able to pivot and adapt quickly **continuous planning is how you get there**.

The need for speed and precision in decision-making has never been more vital. Financial, operational and strategic departments without the ability to immediately orchestrate and match their actions to dynamic markets, an ever-changing economy, and fierce competition cannot keep the pace without 360° planning.

"With Jedox, we can finish tasks that used to take an entire day within seconds."

Apleona

"The increase in efficiency from planning alone is really great! What used to take several hours is done in seconds with Jedox."

Fiat

That's why it is so important that your xP&A solution leverages hyperautomation. Your extended planning & analysis solution should be able to seamlessly unify available data sources, manage the platform environment, and automate reporting. But that can only happen if an organization's people, planning, processes, and data are unified in one single solution.

With Jedox, you have all the information you need for faster financial, operational and strategic decisions from **one single source**.

x.

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A single source of truth

A wide array of systems and solutions can be combined and integrated with Jedox: finance, sales, marketing, HCM, S&OP and more. The result is a **360-degree view** of your enterprise, creating a single source of truth that provides:

› Simplified planning, analytics, and reporting

› Enterprise budgeting and forecasting

› Daily sales reporting

› Product KPIs & inventory analytics

› Management reporting

› Secure, role-based access from any device (Excel, Web, mobile)

› Latest in-memory computing technology

› Lightning-fast calculations for complex enterprise applications

When information comes together as a single source of truth, your business moves ahead.

"With Jedox, it's one set version of the truth that can be viewed in different ways. It's the same data being used consistently across the organization."

Malcom Dagg
Commercial Manager, GWA Group Limited

What's in it for you?

The deep integration of strategic, financial and operational planning and performance management will lead to more accurate plans, forecasts and performance tracking. It allows you to create your own reports and analysis functions or to combine data in practically any way that makes sense for your organization – easily and with less reliance on your IT department.

Discover the Jedox difference to:

1. Increase agility
2. Speed up time-to-value
3. Make better-informed decisions
4. Reveal data-supported insights
5. Predict how they will affect your bottom line
6. Reduce reliance on IT

"We replaced Excel with integrated planning and reporting through Jedox in a few weeks. Our specialist departments plan independently on the web. My team is able to focus on profitable growth."

Michael Bailey
Senior Manager Controlling, Sanofi

A real-world example

With sales over 30 billion EUR, Sanofi is a global pharmaceutical leader. Sanofi needed a unified planning and reporting solution, and implemented Jedox across Europe, first modeling the overarching corporate Business Intelligence requirements, then adjusting with more complex localized requirements. Jedox delivered results instantly: processes that needed hours now take seconds, and users see real-time, high-quality data, checking and adjusting plans on the fly. Controlling focuses on profitable growth, acting on real-time insight instead of wasting hours on manual data collection and preparation.

However, there is plenty to consider when shifting from Financial to Extended Planning & Analysis. Understanding the benefits and abilities when evaluating xP&A solutions is vital to maximize the long-term value of your investment.

Key Considerations

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Turn data into insights:

› Does the solution provide unified, collaborative planning?

› Does it offer flexibility and scalability to grow with the organization?

› Can it break down data silos and does it offer out-of-the-box functionality?

› Does it offer seamless integration with all data sources?

› Are modern capabilities such as AI and Machine Learning available?

Leverage the power of advanced analytics:

› Does the solution enable you to view your data across operational units and from different angles and multiple dimensions?

› AI thrives on data: Does the platform offer AI and Machine Learning for handling practically any amount of data?

› Does the integrated AI support enable you to tie financial and operational results together to provide detailed, nuanced insights?

› Will these new capabilities enable you to conduct your financial and operational planning continuously and increase collaboration?

Rapid time-to-value

Jedox delivers on extended planning. With Jedox, a **rapid time to value** is key – with pre-built templates for P&L, Cost Center, Sales Planning, HR Planning, Balance Sheet, and more. Each model contains out-of-the-box capabilities for reports, databases, business logic and rules, workflows, and integration, all built to flexibly adapt to your needs.
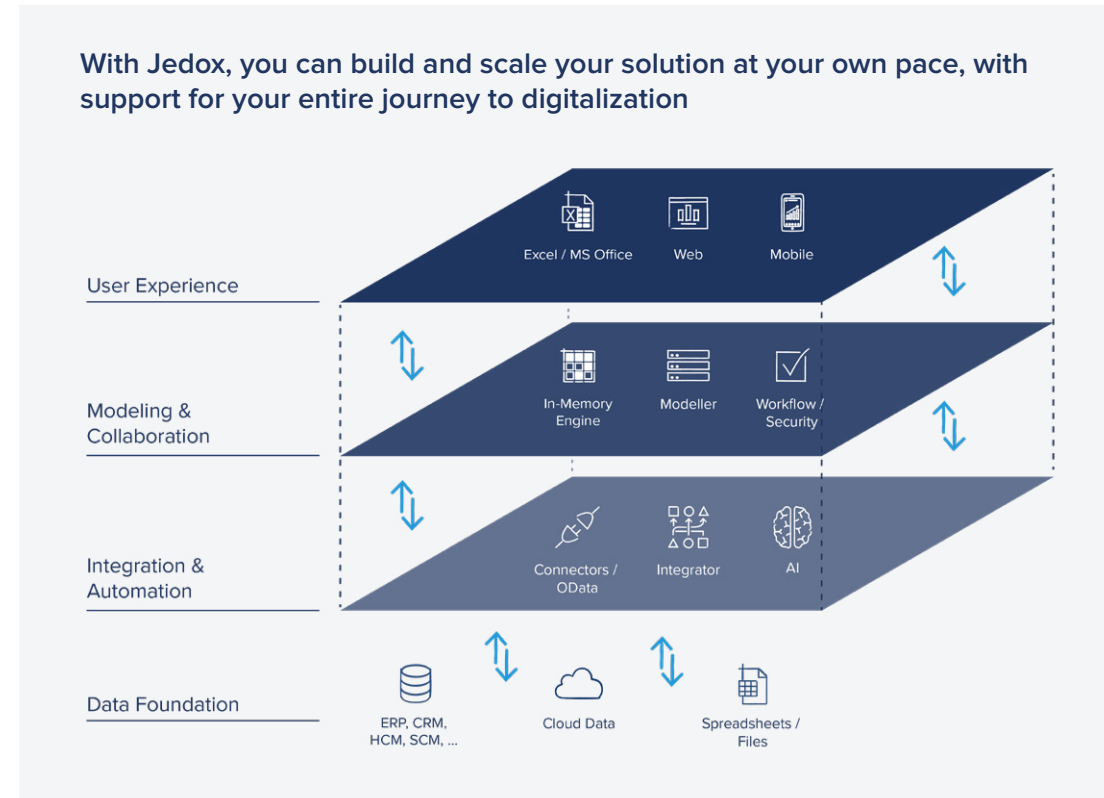
The granular data governance of Jedox **safeguards your data** through granular user roles and permissions – even down to a single cell level. Jedox enables agile corporate performance management anywhere, anytime and on any device.

Think Big. Start Simple. Scale quickly.

Built to accommodate organizations at any maturity level, you can start getting better insights wherever you are in your journey to digitalization. All along the way, you remain flexible with Jedox: New business sectors, new data sources and models can be **added anytime**. The step-by-step approach of Jedox enables you to integrate different data from formerly disparate systems whenever you're ready.

Every organization and every business model is different. Jedox is recognized by independent analysts worldwide for its **flexibility and scalability**. The "model any-thing" approach of Jedox, together with our ability to design any data in practically any way, delivers a solution that not only makes your business future-ready but also **future-proof**.

And more: The **embedded Jedox AI Engine** enables you to get started with Artificial Intelligence easily.

With Jedox, you can build and scale your solution at your own pace, with support for your entire journey to digitalization

User Experience — Excel / MS Office, Web, Mobile

Modeling & Collaboration — In-Memory Engine, Modeller, Workflow / Security

Integration & Automation — Connectors / OData, Integrator, AI

Data Foundation — ERP, CRM, HCM, SCM, ..., Cloud Data, Spreadsheets / Files

Progress through Innovation

AI and Machine Learning enables advanced, auto-mated predictive analytics, the detection of patterns and anomalies, and it compiles and prepares data for maximum automation and convenience to make your work faster, easier, and more precise.

The **ready-to-use AI that is built into Jedox** assists finance and business functions with smart decision support and automation with:

❯ AIssisted(TM) Data Preparation
❯ AIssisted(TM) Predictive Forecast
❯ AIssisted(TM) Performance Management

It supports complex, driver-based modelling efforts, handles even the largest amount of data, saves more time and empowers your business to succeed in a dynamic, digital business environment.

"Jedox gives a clearer, easier path to get started with AI instead of having to work from the ground up and needing specialized data scientists or developers on your staff. We have the ability to feed a dataset to the Jedox AI engine and then the 'magic' happens accessing pre-built algorithms based on industry-standard AI libraries. With Jedox, the finance department gains a direct solution pathway to information that it could not access before."

Kevin Kennedy
Business Systems Manager, Terminix, a ServiceMaster Brand

Transform your planning to create new value by leveraging AI and digitalization to respond rapidly and augment decision-making:

❯ Increase forecast speed and accuracy for better decision-support

❯ Free up resources with automated, continuous forecasting

❯ Understand the impact of change for the entire business

❯ Ensure sufficient size and quality of datasets

❯ Get easy-to-use and transparent ML/AI results

❯ Benefit from continuous updates and dynamic simulations

Siemens achieved this and more with the continuous, predictive forecasting by Jedox. The results:

❯ Replaced manual forecast with automated, driver-based models

❯ Prediction of vacation accruals

❯ Break-down on multiple levels

❯ Increased data quality, transparency & efficiency

❯ More accurate **real-time forecast with 90% accuracy**

x.

Why Jedox?

Jedox creates a seamless digital foundation for Extended Planning and Analysis. Improve efficiency as well as effectiveness across your organization with process automation, collaboration, and ultimately, transformation.

Benefit from a unified data foundation for planning, budgeting, and forecasting across finance, sales, HR and other business functions provides greater consistency and transparency for truly integrated performance management.

Leverage scalable and innovative technologies like cloud computing and artificial intelligence to increase value.

Value Chain

Ecosystems

Use Cases

SAP

Qlik

Distribution

Sales

Power BI

salesforce

Production

Procurement

Customer Segmentation

R&D

Supply Chain Management

Strategic Planning

Demand Forecasting

Capital Planning

"Jedox **is a flexible solution**, not as heavy and unwieldy as other systems in the market. Jedox is also a very fast system, which updates quickly in our data warehouse, so that data is always fresh."

Laurent Weiler
Finance Manager, Kvadrat

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What's next?

Empower your organization with simplicity, agility, and innovation and discover a solution that provides 360° planning. Talk to us today about how Jedox can increase your planning agility with Extended Planning & Analysis capabilities.

Get started today:

Schedule a demo

Or get in touch:

Contact us

jedox.

For more information, please contact:
info@jedox.com
www.jedox.com
http://www.linkedin.com/company/jedox/

Microsoft Partner | Gold Cloud Platform Gold DevOps | Microsoft

About us

Jedox accelerates planning, analysis, and reporting with one unified and cloud-based Enterprise Performance Management software suite. Jedox empowers finance decision makers and business users across all departments, helping them work smarter, stream-line business collaboration, and make insight-based decisions with confidence. Around 2,500 organizations in over 140 countries use Jedox for real-time planning in the cloud, on the web, and on any device. For a free trial, visit www.jedox.com