

A stylized DNA double helix graphic is located on the left side of the page. It features two intertwined ribbons, one blue and one green, with vertical bars of various colors (blue, green, grey) connecting them to form the rungs of the helix.

Global success stories

Deloitte and IBM business analytics

This is an interactive document. Use the links at the bottom of the page to navigate forward and backward, return to the contents page or skip forward to the next story.

Message from our leaders



Bob Dalton

Principal
IBM Global LCSP
and Relationship Leader

Deloitte continues to grow our joint marketplace success with IBM Software Group, in driving value for our mutual clients. Business analytics and information management is a key priority, especially as companies shift their orientation from hindsight, to insight to foresight, in order to drive better decision making and business results. – [Bob Dalton](#)



Nat D'Ercole

Principal
IBM Business Analytics and
Information Management Leader

Our team delivers solutions that are business focused and enabled by IBM technology. Our clients' success is based on our unique ability to interpret and challenge requirements, design and build solutions with business processes in mind and provide change management and communication services to drive enterprise adoption. I am very excited to share our IBM business analytics and information management client successes with you. – [Nat D'Ercole](#)

The Deloitte and IBM Alliance

With a track record of achievement that spans more than a dozen years, the Deloitte and IBM alliance combines the strengths of both organizations to help global enterprises in their efforts to address their toughest business issues. This 'smarter teaming' approach results in better service and higher value for our joint clients.

Deloitte is the largest privately held professional services organization in the world with respect to headcount and breadth of capability, delivering audit, enterprise risk, tax, finance, strategy and operations, human capital, and technology services. Deloitte applies a truly multidisciplinary approach to addressing our clients' needs, merging our industry, business, and technical expertise across this breadth of services.

The second largest publicly-traded technology organization in the world, IBM has built an unbeatable portfolio of solutions aimed at helping clients reduce costs, increase revenue, manage risk, optimize supply chains and improve the customer experience. IBM's business model is built to support two principal goals: helping their clients succeed in delivering business value by becoming more efficient and competitive through the use of business insight and information technology solutions; and providing long-term value to shareholders.

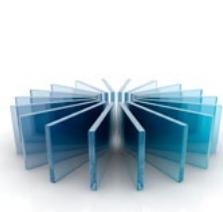
Our alliance offerings unite the depth and breadth of IBM's technology portfolio with Deloitte's world-class methodologies and consulting experience. Working together, Deloitte and IBM continue to help our joint clients create and capture value, based on our shared focus on growth, execution and accountability. Technology is a core foundation to our delivery. We apply technology as both an enabler and as a transforming element – delivering current business “better, cheaper, faster,” and creating new models of business in an industry, sector, or client. We match solutions to the needs of each client and deliver advice, implementation, management, and operations – from strategy through sustainment.

With Deloitte's strategic alliance relationship with IBM, we deliver unbeatable capabilities, focused on the business issues important to our clients. Our investments and scale are aligned around those issues to deliver complete value-based solutions.

Click on a success story



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Data management and reporting in Healthcare



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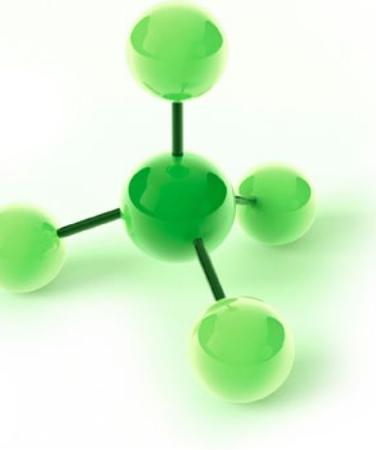


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Financial governance and internal reporting in Public Sector



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Data quality, profiling, data governance, dashboards, and operational reporting in Public Sector

Success story | u.s. | Data management and reporting in Healthcare



Brief description of service

A global healthcare company with expertise in medical devices, pharmaceuticals and biotechnology was looking to integrate data from multiple legacy systems. Due to the disparate systems, they were unable to provide a single version of the truth or evaluate business for global users, and needed to enable timely BI adoption to a major JDE ERP upgrade. Deloitte was chosen to develop and implement a data management and reporting solution called Analytics Factory, which integrated, conformed and stored data from JDS, Peoplesoft, Hyperion and Cognos Contributor systems.

What problem does this service solve/address?

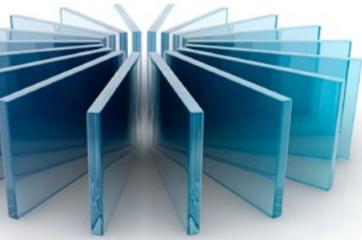
For some time, critical status reports had been delivered much later than needed or contained scrambled data, making it difficult to get ahead of problems. Additionally, because each division managed reporting and analysis independently, there was little consistency in the data. The Deloitte-developed factory environment provides the foundation for an enterprise data warehouse containing information that can be leveraged across all divisions.

The solution leverages IBM InfoSphere Information Enterprise Edition, DataStage, Cognos and data quality checks to integrate data from enterprise systems, monitor data integrity, and provide a global reporting platform. IBM Cognos is used to support all regional and global reporting needs, providing multiple canned reports, dashboards, DMR cubes and self-serve reports. Deployment of DMR reduced batch windows and enabled timely delivery of data. Power users also used Analysis Studio to perform deep dive analysis.

Success story

Consisting of more than 4500 DataStage jobs, 200 reports, and 25 virtual/physical cubes, the Analytics Factory solution has provided the client with visibility into various standardized KPIs across the globe. The client is now able to analyze global daily sales at the customer level, and benchmark business performance globally across regions and countries. The solution has also helped improve enterprise efficiency, by maintaining optimal levels of inventory globally. Process and data quality methodologies developed for this solution are being extended out to Supplier Management, Product Development and R&D organizations.

Success story | Canada and U.S. | Financial planning and analytics in Technology, Media and Telecommunications



Brief description of service

Following an investment in IBM Cognos Finance Analytics suite, a global media and entertainment company experienced a troubled Phase 1 rollout with its initial implementation partner. The client asked Deloitte advisors for assistance in overcoming inefficient Finance information processes, limited financial reporting and analytics capabilities, poor finance analytics information governance, and ineffective information systems. Deloitte was engaged to help modernize and improve finance analytics processes, controls, information, organization, and systems, and to assist with off-shore sustainment.

What problem does this service solve/address?

The resulting enterprise planning and analytics initiative was designed to help the company achieve improvements in Close, Consolidations and statutory reporting, as well as Plan, Budget, Forecast, Management Reporting and Analysis. A multi-disciplinary Deloitte team with technology, change management, business process and xBRL compliance skills collaborated with IBM Cognos Lab Services to provide a business-led and technology-enabled implementation of the IBM Cognos Finance Analytics Suite. Deloitte assisted the client in implementing its initiative, designed to provide improvements in Close and Variance Commentary, Consolidations and SEC disclosure reporting, Long Range Forecast, integrated and driver based Budgeting and Forecasting, and Internal Reporting to over 300 users across North America and International locations.

Success story

Following the first wave of implementation, the company experienced a modernized financial analytics solution comprising new processes, standardized data, and common finance analytics systems capable of scaling for the next ten years, extending from North American operations to International units. Specific benefits included:

- One version of the truth for actual, proforma, budget, forecast, commentary and currency effected results for North America and International
- Sustainable enterprise financial reporting solution, eliminating costs to redo chart of accounts for North America and International
- Reduced system and information complexity and faster delivery of the budget from prior years (from 3 months to 1.5 months) and reduced effort and complexity to complete an intuitive driver-based forecast for North America
- High-performing in-memory and scalable solution that solved the accounting and finance organization's data, talent, and processing crunch
- Internal business, systems, and change management capability, with a low-cost sustainment organization supporting the transition from legacy to modernized systems and processes for North America
- Ability to embed Excel and PowerPoint to enable self-service reporting in Division Finance, Accounting, and North American markets

Success story | u.s. | Finance analytics



Brief description of service

A global organization needed to improve its financial analytics capabilities. Its existing environment was hampered by a lack of standardized processes, duplication of effort, lagging controls, and poor data quality – making it difficult to achieve transparency in business operations or use information to plan strategically. Deloitte was engaged to design and implement standardized business processes and systems to reduce process cycle time, establish data structures to support highly relevant analysis, and enable emerging business needs through a scalable IT infrastructure.

What problem does this service solve/address?

Deloitte worked with the company to develop and implement a finance analytics roadmap, focused on improving business processes, implementing an industry-centric information model, and leveraging existing technology investments to enable a scalable yet flexible architecture.

Deloitte worked side-by-side with business leaders and analysts to understand the business needs, design business processes, and define the enabling technical architecture. Deloitte practitioners provided both the technical and financial expertise necessary to validate that the required finance analytics capabilities were embedded in the solution. To align the solution with current organizational standards and capabilities, the team proceeded with an IBM Cognos TM1 and

Microsoft SQL-Server-based solution, architected to scale as business needs evolved. The team leveraged an incremental “prototype, build, and deliver” approach to manage organizational change and engage the business community in the evolving solution.

Success story

From a technology perspective, the new platform was vastly simplified, easier to support, and more efficient – including a 20x reduction in applications that required support and a 50-percent reduction in data integration code, both of which have contributed to improved efficiency and a 99.9 percent scheduled availability record. More importantly, the solution enabled a redeployment of IT resources from “supporting and patching” to “value-added” systems enhancements.

From a business perspective, the time required to perform work was reduced and the quality of analysis improved. Financial analysts spent less time solving data challenges and more time delivering analysis linked to business needs, such as a 30-percent reduction in business cycle duration and the reduction of many last-mile processes from days to minutes. These improvements were a direct result of business process changes, improved confidence in information used for analysis, and improved reliability of underlying technology. Overall, this initiative streamlined analysis, refocused resources on strategic business objectives, and established an integrated global business process that drives performance.

Success story | u.s. | Financial reporting in Energy



Brief description of service

A global energy company was having problems with their financial close and reporting process. While they had already implemented IBM Cognos Financial Statement Reporting (FSR), the IT group was still relying on legacy manual processes that limited their ability to fully leverage the software's capabilities. The company engaged Deloitte to perform an assessment to identify the issues and recommend new procedures to improve their Financial Close and Reporting process.

What problem does this service solve/address?

Deloitte and IBM then teamed on a high-level assessment of the Cognos FSR implementation and identified a number of issues and opportunities, including:

- Limited use of validation rules led to over 100 hours of manual reconciliation
- Manual sourcing of data through lead sheets was causing confusion
- IT's lack of experience with SQL was limiting the assistance that could be provided to the reporting team in resolving FSR error messages
- Training sessions performed in groups outside of the reporting team was confusing and inadequate

Deloitte provided the client with leading-practice insight pertaining to the Cognos FSR tool and its capabilities. The team conducted stakeholder interviews as well as a performance test of the Cognos FSR environment and made recommendations based on performance benchmarks. They were also able to provide input from a team of SMEs (e.g. SEC reporting team) at critical stages.

Success story

Based on the success of the project, the client requested Deloitte's assistance to immediately implement every identified quick-hit initiative and begin planning to assist in the implementation of the long-term initiatives. The client has been able to improve the performance of their FSR environment and has begun to make changes to the overall process, which will help them continue to improve data governance and capture efficiencies.

From the engagement, Deloitte developed a repeatable, sophisticated maturity model that helps clients evaluate their FSR capabilities compared to other leading companies and assess future enhancement opportunities to further evolve their use of the tool.

Success story | Canada | Planning, budgeting, and forecasting in Public Sector



Brief description of service

A Canadian municipal government chose to build upon their capabilities, where we had developed an integrated budgeting, planning and reporting solution and operating budget model for a particular department. Upon successful completion, we then developed and implemented a corporate compensation planning model for the entire organization. During this second phase of engagement with the client, we leveraged the technical environment developed previously, adding new functionality to an existing TM1 environment.

What problem does this service solve/address?

Most organizations grapple with their budgeting. Between aggregating disparate data, parsing massive amounts of information and reconciling all accounts, the process can be exceptionally cumbersome and extremely time-consuming. With this problem solved via the initial TM1 environment implementation (phase 1), we then developed both a CPM solution, IBM Cognos Xcelerator (TM1), for budget and compensation planning, and Cognos Advisor (Executive Viewer) for end user reporting and analysis, across the organization (phase 2).

Success story

After phase 1, the client's department was able to automate their budget model, which allowed for reduced data inaccuracy and vastly accelerated the budgeting process. It also positioned the client's department to quickly build and easily generate accurate and

meaningful reports. Allocating expenditures over various programs was streamlined. Rather than a cumbersome, days-long process, the client's department was able to allocate instantly and immediately confirm that all numbers reconcile. By freeing up staff time from manual reconciliations, the client's department was able engage in more meaningful data analysis – a function further supported by the system's ability to automatically analyze disparate data groupings, compare data and support accurate forecasting.

After phase 2, the client had a tool to allow them to conduct 'what if' scenario analysis in real-time and assist with collective bargaining negotiations, incorporate part-time and vacant positions in their budget, isolate the cost and FTE impact of strategic initiatives and build ad-hoc management reports. As well, the compensation planning input process was greatly streamlined, with greater transparency and accountability between the corporate budget planning teams and individual departments.

The entire organization now benefits from a modernized, compensation planning tool that is utilized by 30+ users across all departments. With increased automation and accuracy to the process, the organization can now spend less time on inputting employee information, and more time leveraging the analytics capabilities of the compensation model.



Brief description of service

Deloitte was engaged to manage overall project delivery for a leading travel agency, based on our long-standing relationship, industry experience, and strength in delivering financial and operational performance solutions. We provided vendor assessment of a range of software applications that were identified as being well-suited for the existing IT architecture. In addition, Deloitte consulted on several aspects of the design document to support infrastructure, security and data integration. Finally, Deloitte resolved infrastructure and implementation issues and provided advice around specific build requirements.

What problem does this service solve/address?

As a consequence of its rapid growth through acquisitions, the travel agency had poor insight into the financial and operational performance of their business segments, despite the high cost of its systems environment. The core problems included lack of a unified approach to Group Consolidation reporting, no functional platform to support innovation, and outdated, no longer supported software. The travel agency and Deloitte evaluated its existing systems and software. The goal was to select new, integrated solutions for consolidation, reporting and financial planning and eliminate inefficient, older technologies. With an aged technology platform and an immediate need to improve business analytics capabilities, Deloitte delivered a comprehensive solution including Cognos Controller, TM1 Financial Analysis, and Cognos BI software, quickly and efficiently.

Success story

As a result of the software implementations, the client realized substantial gains in efficiency, effectiveness, improved capabilities, and scalability. Efficiency was achieved through a consistent IBM Cognos application platform and centralizing chart of accounts, source ledger interfaces and business reporting enabled the client to fully automate consolidation processes and unlock workflow efficiencies. Effectiveness was achieved through improved understanding of segmented information, common management information, and increased flexibility to meet stakeholder demands. Improved capabilities stemmed from direct technology gains once Cognos Controller, TM1 Financial Analysis, and Cognos BI software were operational and utilized. Finally, scalability was achieved through the successful implementation of architecture and information infrastructure, unlocking opportunities to rollout Cognos Controller to further business segments, as well as extend the TM1 Financial Analysis software upload to integrate flat files from other segments of the company.

Success story | Canada | Planning, budgeting, forecasting and financial reporting in Public Sector



Brief description of service

A leading Canadian pension fund chose to implement IBM Cognos Business Intelligence for financial reporting and upgraded its financial reporting, planning and forecasting processes to IBM Cognos TM1. To manage complex hierarchies, structures and dimensions, the team also implemented IBM Cognos Business Viewpoint.

What problem does this service solve/address?

As large pension companies continue to grow in both membership and assets, the complexity of their financial accounting structure can become onerous. With numerous sets of books and unique charts of accounts, it can be difficult to get an enterprise-wide view of the financial position, and analysts can spend the majority of their time reconciling financial statements and validating data; diverting them from more valuable endeavours.

Success story

As a result of the successful Cognos implementations, the client accelerated reporting processes, gained deeper insight into operations, improved integration between finance and planning and achieved simpler, more efficient planning. The solution united multiple sets of books and charts of accounts into a single source of truth, eliminating the need for manual reconciliations and saving several days per quarter. It accelerated financial report generation significantly, delivering vital data to business users in near real time, providing better insight into the business, and leading to timelier, proactive decisions. An allocation process was streamlined, equating to an annual processing time saving of approximately 30 hours. In addition, information governance was improved by ensuring continued compliance with International Financial Reporting Standards (IFRS) and streamlining external audits.

The solution united multiple sets of books and charts of accounts into a single source of truth, eliminating the need for manual reconciliations and saving several days per quarter.

Success story | u.s. | Planning, budgeting and forecasting in Financial Services



Brief description of service

A leading specialty insurance provider engaged Deloitte to implement a solution to enhance their planning, budgeting and forecasting capabilities. The key business objective was accurate and timely submission of their annual plan, forecast, and extended year plans. These objectives were impeded by the manual nature of existing processes and technology limitations. Deloitte delivered the IBM Cognos TM1 solution for improved planning, budgeting and forecasting and built seamless integration between SAP and TM1.

What problem does this service solve/address?

Deloitte delivered a comprehensive solution that improved the client's existing financial planning operations, processes and technology, which lacked capabilities to deliver timely plans, forecasts and extended year plans. Deloitte led the client through all phases of the system development life cycle to go-live and provided post production support. The phases included analysis, design, build, test, training, deployment and post go-live support. Key elements of the solution included: determining appropriate sizing and server requirements for planning, budgeting, and forecasting, upgrading the hardware platform, building and enhancing templates for data entry and

reporting, implementing improved security and workflow controls, enhancing the capability for performing allocations across lines of business and branches, and automating the generation of adjustment journal entries.

Success story

The client realized substantial gains from the IBM Cognos TM1 solution and SAP / TM1 integration. The redesigned TM1 application transformed the client's planning process through improved controls and enhanced reporting and analytical capabilities. Deloitte enabled the client to complete their annual forecasting and planning cycle after the implementation of the new GL tool. The solution eliminated several key manual processes, provided end-to-end planning and forecasting capabilities, and provided an improved user interface with better data validation controls to improve the accuracy of budget and forecast submission.

Success story | Canada | Planning, budgeting, and forecasting in Oil & Gas



Brief description of service

A leading Canadian energy company chose to implement and integrate both IBM Cognos TM1 and IBM Cognos Business Intelligence. This robust, integrated solution provides more timely access to information, enables basic business scenario modeling, and supports forward looking analytics. Organizations benefit from this integrated solution as it eliminates excel based mid / long-range forecasting and budgeting to enable better decision making.

What problem does this service solve/address?

Most organizations grapple with their budgeting. Between aggregating disparate data, parsing massive amounts of information and reconciling all accounts, the process can be exceptionally cumbersome and extremely time-consuming. The integrated IBM Cognos solution solved gaps outlined in the client's playbook (i.e. cost management, business process improvement), as well as their finance effectiveness program (i.e. simplification, accountability, sustainability, transparency, and capability development and competency improvement). The integrated IBM Cognos solution delivered an automated driver-based budgeting, forecasting planning and analysis process across multiple lines of business, streamlining the client's operations.

Success Story

As a result of the successful implementation and integration, the client aligned to a single performance management application, replacing the existing multi-platform structure. This resulted in reduced overall software licensing expense, improved timeliness, accuracy, consistency, and reliability of forecasting, budgeting, planning, and analysis of the information sources, and ultimately supported accuracy of reported information (single source of truth).

As well, Enterprise Performance Management (EPM) tools provided for the ability to move to a single data and information structure layer that could be utilized and maintained, resulting in the reduction of multiple layers and maintenance requirements. Further, the solution enabled business workflow to provide for documented submission and approval processes, standardized IBM Cognos EPM tools for eased sustainability, and improved insight, reporting, trending, and analysis on key drivers associated with forward looking information for the company, including trending against prior period information. Finally, the transition was successful, as we provided embedded training, build, testing, and operation of the system to each of the operating areas to build competency within each individual utilizing the system.

Success story | Canada | Planning, budgeting, forecasting and reporting in Professional Services



Brief description of service

When Deloitte's internal firm client needed to select the most effective tools for its Enterprise Planning System (EPS), they selected IBM Cognos TM1 technology. With the experience gained from over 8 years implementing Cognos software solutions for clients across North America, and more than 200 implementations globally, Deloitte's Performance Management Technologies (PMT) practice supported this major implementation.

What problem does this service solve/address?

The client had been using non-standard processes and tools, including disparate spreadsheets and business rules. This process was labour-intensive and difficult to coordinate, and it contributed to a lack of consistency surrounding assumptions, versions, and data integrity. There was no transparency of planning progress or bottom-up buildup of the plan and there was no way to complete forecasts at a detailed level. Most importantly, these non-standard tools provided no alignment between the overall plan and the firm's compensation methodology. Essentially, the new enterprise planning, budgeting and reporting capabilities were designed to help the client overcome systemic historical challenges.

Success story

As a result of the Cognos TM1 based implementations, the client realized substantial gains. Deloitte replaced hundreds of manual processes with optimized and consistent calculations, version control, and real-time reporting. "One Deloitte" planning templates replaced spreadsheets, and data is automatically loaded and aggregated, ensuring consistency of calculations and version control. Value-add analytics include self-service querying, charting and reporting. The solution is highly scalable, allowing drill-down from metrics to lower levels, as well as detail or summary forecasting. There is transparency into a bottom-up plan buildup, as well as improved top-of-house communication to lower levels. The solution also provides leaders and planners with the ability to create real-time in-flight reports.

Deloitte replaced hundreds of manual processes with optimized and consistent calculations, version control, and real-time reporting.

Success story | u.s. | Data architecture, data integration and operational reporting



Brief description of service

Deloitte's global Supply Chain and Finance BI solution based on IBM Data Stage/Cognos platform provides an integrated, globally conformed and efficient analytics capability to the client. The solution enables the client to automatically view their product inventory position, service levels and perform financial analysis globally within seconds, enabling smarter business decisions. In addition to advanced analytical capabilities, the solution reduces manual labor, minimizes infrastructure costs and provides a "Global Version of Truth".

What problem does this service solve/address?

The client faced several challenges in operating their IT services to meet business analytics needs globally. The client lacked a global reporting and analysis strategy to meet business analytics needs. Business analytics was fragmented across regions and countries. This resulted in multiple versions of business rules and KPIs across the globe creating integrity concerns, compliance risks and many hours of manual work. Moreover, they did not have a system which measures the performance of the business in a consistent and timely manner both regionally and globally.

Success story

Deloitte was engaged to integrate Supply Chain and Finance data to provide a global BI solution to meet the analytics needs of a wide variety of audiences ranging from business analysts to C-level executives.

Deloitte implemented a global BI solution using IBM Data Stage as the integration tool and IBM Cognos as the reporting tool. The source data was globally integrated, conformed and stored in a data warehouse. Multiple de-normalized and aggregated data marts and cubes were created to support reporting and ad-hoc analysis. The global data incorporated consistent business rules to provide single version of truth and consistent KPIs to compare businesses across the globe. The solution also allowed for individual regions to build their own customized solutions, based on an integrated global data from the data warehouse. In all, the solution consisted of over 1000 data stage jobs, 200 reports and 60 virtual/physical cubes.

As a result of the solution, the client was able to analyze data globally within seconds across Supply Chain and Finance.

Success story | u.s. | Governance, risk and compliance in Financial Services and Energy



Brief description of service

Deloitte's Dodd-Frank rule repository and assessment tool for Derivatives (Title VII) is built using IBM Open Pages technology and is designed to help market participants comply with the complex implementation of the Dodd-Frank Wall Street Reform and Consumer Protection Act's ("Dodd-Frank" or the "Dodd-Frank Act") regulations. Clients will need to identify applicable rules from thousands of pages of regulatory rulemaking, coordinate among their legal, compliance, technology, operations and risk departments and make strategic decisions to respond to a new financial and regulatory landscape. The tool accelerates this process with a consolidated library that contains the rules and related metadata assembled from selected US-based regulatory agencies and augmented with Deloitte's understanding of the operational implications of the rules. The content is also decomposed into discrete project activities that firms can use as a basis to initiate change.

What problem does this service solve/address?

The Dodd-Frank Act brings on a host of new and complex regulations to an already highly regulated marketplace. US regulators are tasked with finalizing rules to implement the Act while market participants are struggling to digest and understand how these new regulations will impact their business functions. Organizations are currently attempting to track and monitor the rules on spreadsheets. The process can be manual, error-prone and unreliable.

Success story

Deloitte has been selected by multiple Financial Services and Energy firms to assist with Dodd-Frank compliance programs. These assessments accelerate the process by using a central repository and tool as the foundation.

The rules organized in the library can be downloaded in various formats and can feed client's project management reports. These rule feeds can then serve as the basis for creating project checklists, developing implementation working groups and distributing tasks.

Advanced graphical reporting supports project management requirements from many levels, by providing multiple ways to aggregate and drill-down on information using dynamic filters based on roles and responsibilities. In addition, the interactive reports provide a means to educate individuals on the intricacies of the regulations. Moreover, workflow can be added to facilitate and automate existing manual processes around communication between multiple parties. The tool supports expanding the library quickly as organizations are working with different sections of the law and is highly configurable.

Success story | Canada and U.S. | Planning, budgeting and forecasting in Technology, Media and Telecommunications

Brief description of service

The solution was delivered to the whole enterprise using IBM Cognos TM1, including TM1 Web to capture and consolidate plans, with reporting and analysis provided in real time in Cognos BI 10. Information management was delivered using a combination of Informatica and TM1 Turbo Integrator. Deloitte provided a global team using European, North American and India resources throughout the project lifecycle.

What problem does this service solve/address?

A leading entertainment company's multiple business units faced several challenges with their forecasting and planning systems and business processes, which led to excessive time to react to a market where consumer behavior can change very rapidly. This included lack of transparency, poor information quality, and minimal flexibility, all leading to slower reaction time in a fast-moving market. They required a common corporate planning application to be delivered to a community of 160 users across the whole enterprise.

Success story

Deloitte used its experience across a wealth of sectors and delivered a flexible platform that could accommodate these wide-ranging requirements.

The winning solution leveraged:

- **Data management:** Highly experienced data management experts worked closely with source system owners to define and deliver key interfaces to automate as much of the data provision in to the system as possible, whilst leaving manual input forms to apply adjustments as required.
- **Design, delivery and test:** Deloitte provided experienced TM1 developers and architects to deliver the engagement, supported by a global reference team of SMEs to provide input during key areas of complexity.

Business benefits as a direct result of this implementation, including:

- Automated cash flow and roll-forward reporting from balance sheet submissions
- Iterative forecasting capability
- Real time planning and reporting
- Common consolidated planning applications for business segments
- Output integrated with corporate reporting solution

Success story | u.s. | Governance, risk and compliance in Financial Services



Brief description of service

The client was interested in replacing their Sarbanes Oxley (SOX) self-assessment controls tool, which consisted of an eRoom filled with various document types such as narratives, test plans, test results, self-assessments, policies etc. A Microsoft Access database was used to create and manage numerous standard and ad-hoc reports as well as spreadsheets. To support this strategy, Deloitte helped facilitate a formal vendor selection process.

What problem does this service solve/address?

Managing spreadsheets became a tedious and time consuming effort and there was no direct link to the overall 404 self-assessment process, 302 Certification process, and all phases of testing. Other issues included manual notification, difficulty identifying role changes, and manual generation of status reporting. To resolve the client's problems, Deloitte performed the following:

- Development of functional requirements; technical requirements and high-level technical architecture; a vendor short list; a Request for Information (RFI); a demo script; and development of vendor evaluation criteria and weightings
- Consolidation of RFI responses
- Coordination of vendor demonstrations
- Consolidation of client vendor scoring and vetting against requirements
- Development of high-level gap analysis of selected vendor and client requirements

- Leveraged results from the vendor selection as the basis for the functional, technical and people requirements
- Developed application mock-ups to enable the client to see a preview before the system was developed
- Created the detailed project plan; a customized application and administration guide
- Conducted detailed training sessions for the global organization including "train-the-trainer"

Success story

As a result of the formal vendor assessment and selection process, the client realized substantial gains. Deloitte provided the following:

- Vendor short list
- RFI-detailed functional, technical, general, and vendor requirements
- Detailed demo script
- Automated scorecard -multiple worksheets including functional, subjective, validation, cost, and general/vendor summaries, vendor RFP responses, vendor RFP Comparisons, vendor self-assessment scores, various scores by user groups
- Full-time on-site resources during the implementation effort, enabling the client to make faster decisions
- A solid foundation for data mapping, report templates and the ability to expand into other areas such as compliance and operational risk

Success story | u.s. | Financial governance and internal reporting in Public Sector



Brief description of service

A U.S. public sector defense department engaged Deloitte to provide an internal collaboration tool to facilitate budget data compilation and integration with justifications, using IBM Cognos FSR. The budget data compilation involves the creation of a Budget Estimate Submission document which is submitted to the defense department for review and then finalized as the President's budget. This budget is then presented to Congress for approval. In a typical environment, data and content for the budget document is assembled from disparate systems, individuals and teams. Based on feedback from the client, managing version control, process workflows and validating numeric values in narratives against system-generated data were all challenges that required tedious manual labor to accomplish. Deloitte's service was phased: report framework creation, source data preparation, validation and controls creation, and workflow review.

What problem does this service solve/address?

Managing version control, process workflows and validating numeric values in narratives against system-generated data were all challenges that required tedious manual labor to accomplish. Deloitte delivered the following:

- **Report framework creation:** The budget report was broken down along lines of its content so that content, workflow and data can be managed collaboratively by their respective stakeholders and owners.
- **Source data preparation:** Deloitte worked with the defense department to identify the budget document's underlying data sources and where possible, normalizing similar data and creating controlled input mechanisms for manual input.
- **Identify and create validations and controls:** Creating validations and controls within the document allowed for simple checks and balances to be centrally managed and easily reviewed.
- **Process workflow review:** Worked with the client to determine the overall process to assemble the budget report, uncover areas where their process can either be streamlined or technology can be employed to reduce FTE's spent on document assembly.

Success story

As a result of the IBM Cognos FSR solution, the client identified efficiencies. The ability to manage version control, process workflows and validate numeric values in narratives against system generated data were all streamlined and automated. Budget submission, starting from the creation of a Budget Estimate Submission document to submission to the defense department for review became more efficient. As a result, the Agency's President's budget submission could be finalized in a timely manner to then be consolidated and passed to Congress for approval.

Success story | uk | Data quality, profiling, data governance, dashboards, and operational reporting in Public Sector



Brief description of service

Like many public institutions around the world, the client faced severe budget pressures and needed to consider workforce as part of its effort to meet austerity measures. Deloitte, already working with the client on workforce issues, saw this as an ideal opportunity to use analytic techniques and create a solution capable of monitoring, comparing and predicting organizational risk. The aim was to develop an intuitive and comprehensive tool that the client could use to understand, identify, and predict performance and risk within the entire system and target resources appropriately.

What problem does this service solve/address?

Given the client's situation, Deloitte reviewed how it could use its existing wealth of data to be more effective in maintaining quality controls going forward. Those with system oversight responsibility need to have the ability to better identify and predict organizational risks, as well as monitor the performance and interaction of workforce and quality.

The client faced the following issues:

- Data was retrospective and out of date
- Individual indicators of risk were often looked at in silos, preventing analysis of patterns between indicators

- Analysis was often ad-hoc and not supported by robust statistical techniques
- Processes were labor intensive and manual
- Workforce plans were iterated repeatedly between delivery organisations and their QA bodies, increasing timescales and tensions
- Process, dashboards and metrics used were different in each region, making establishment of best practices and benchmarking difficult

Success story

Deloitte helped the client:

- Consolidate best practices through stakeholder engagement
- Use predictive analytics to forecast risk
- Create an accessible interface
- Ensure the tool was dynamic and sustainable
- Create a standardized definition of risk indicators based on existing literature, custom and practice and expertise
- Combine datasets to enable the rapid and structured consideration of risk factors
- Shift the focus of risk assessment from current data to projected data
- Incorporate data quality assessment into the risk assessment process
- Allow users to compare and contrast their organizations with peer groups both at a data, and risk level



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