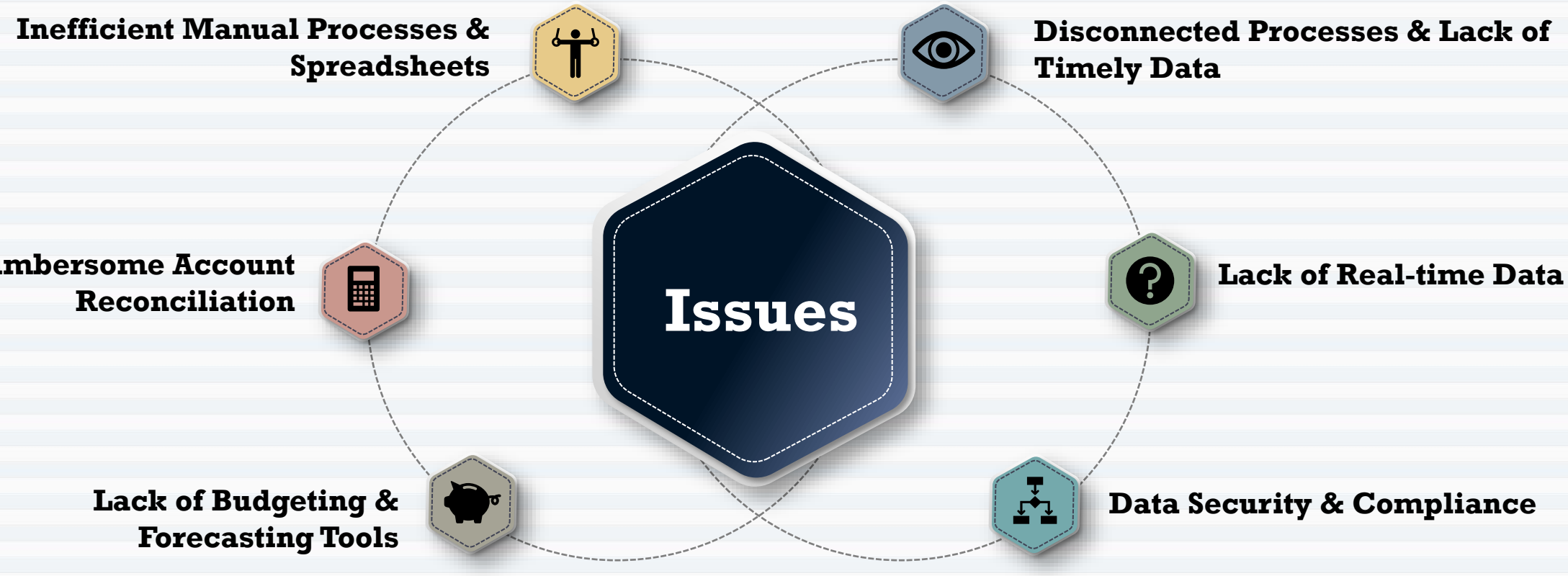
The Ultimate Guide to Enterprise Performance Management (EPM):

Market Research, Platforms & Use Cases



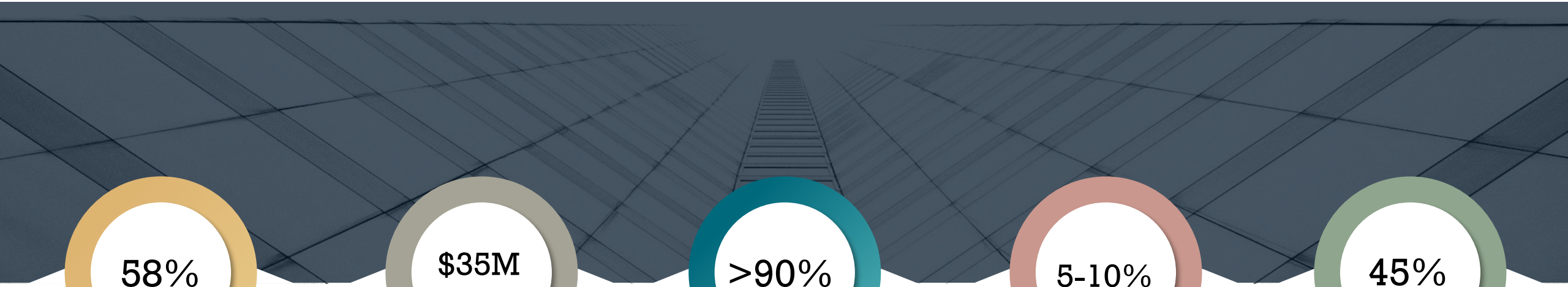
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Common Issues with Companies Today



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Effects of the Traditional Modeling



58%

organizations use spreadsheets to track performance

$35M
Per year

spent by a company with 10,000 employees to conduct reviews

>90%

managers are not happy with the current annual review process

5-10%

decrease in profitability can result from poor performance management

45%

managers do not see value in the review systems used

Source: darwinbox | CEB

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Introducing EPM



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Enterprise Performance Management (EPM)

- Helps analyze, understand, & report on business performance
- Assists organization planning, budgeting, forecasting & reporting on business performance
- Consolidates & finalizes financial results
- Also known as Business or Corporate Performance Management
- Ensures clear communication of company objectives & strategic goals

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Stats on EPM

$7.23

Average ROI that companies can achieve for every dollar spent on EPM software and implementation.

67%

Top-performing organizations are more likely to use EPM solutions to drive business performance compared to their peers.

79%

executives believe that organizations that base decisions on data analytics are more competitive.

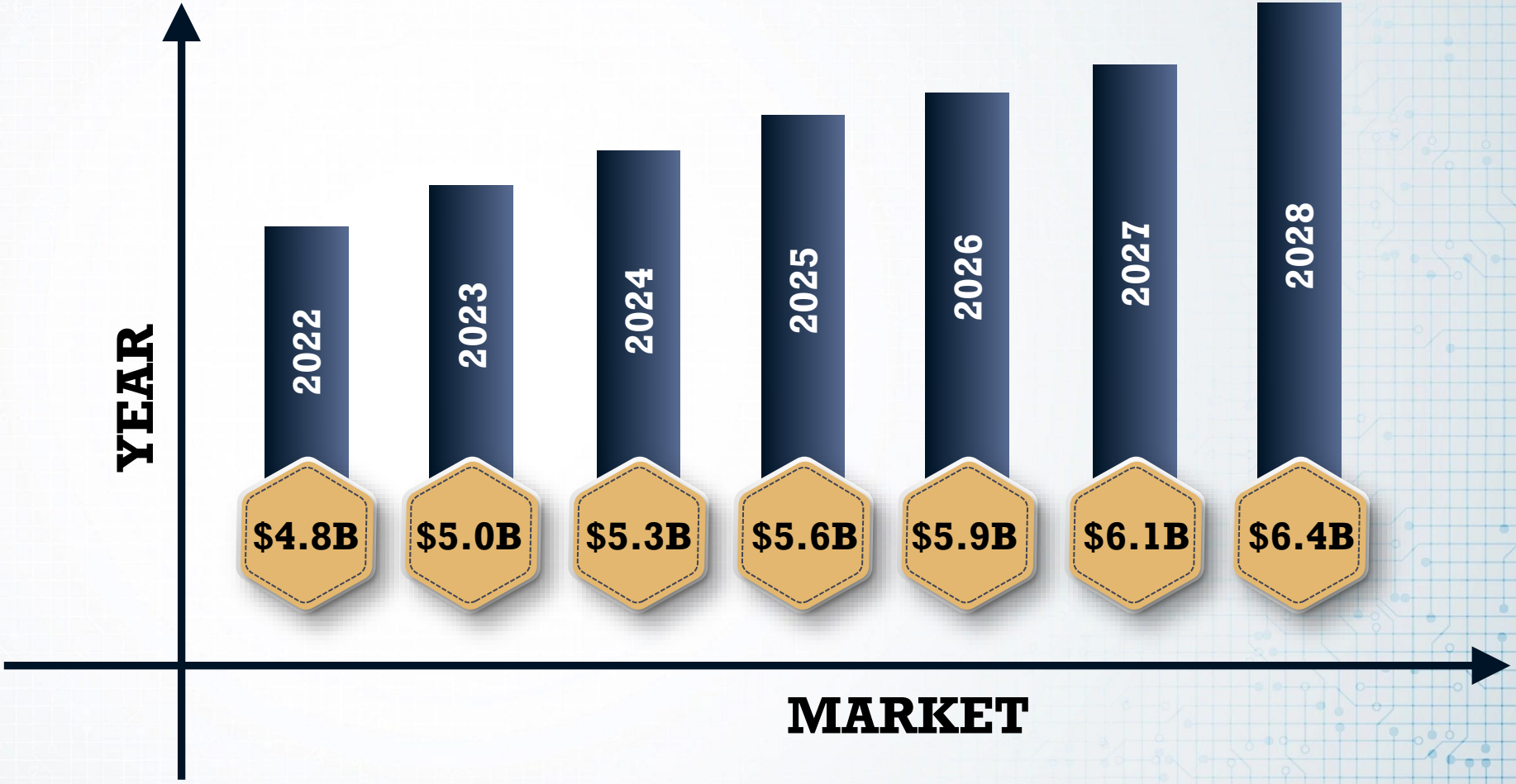
89%

organizations have implemented or plan to implement EPM solutions to improve business performance.

Source: rheincs | Aberdeen

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EPM Market – The Numbers



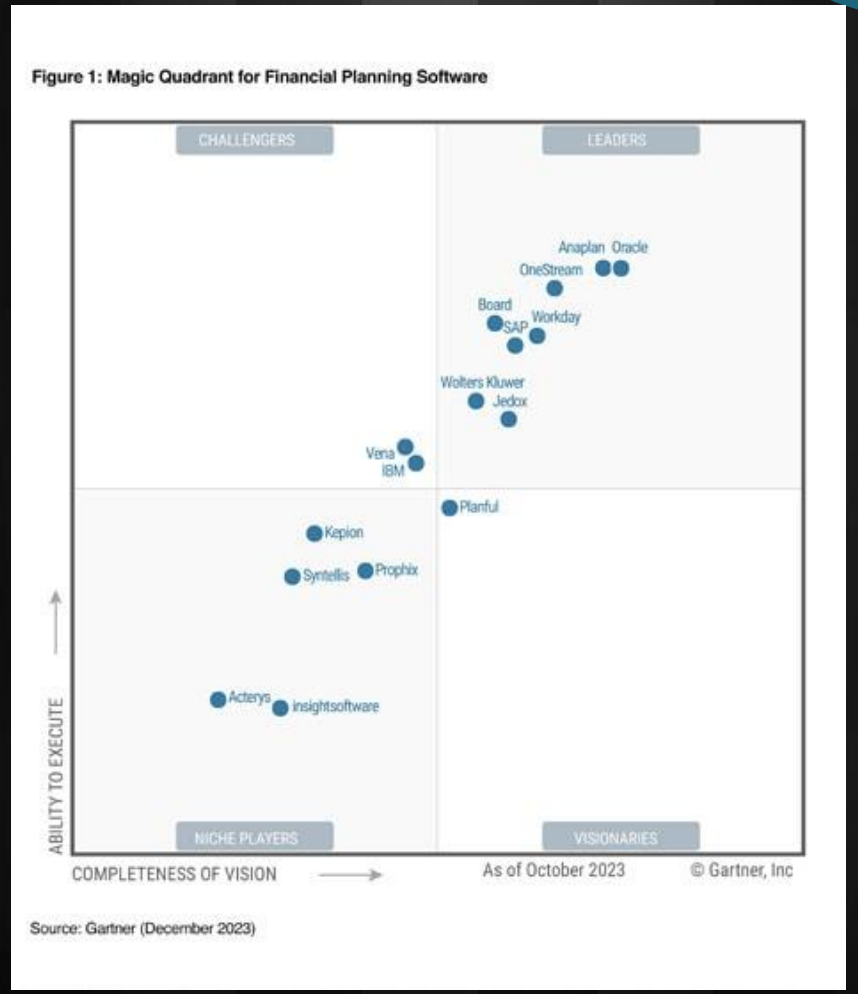
Source: statista

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EPM Platforms

- Oracle Cloud EPM
- Anaplan
- OneStream
- Workday Adaptive Planning
- Board
- IBM Planning Analytics
- SAP Analytics Cloud
- Jedox EPM Software
- Planful Continuous Planning Platform

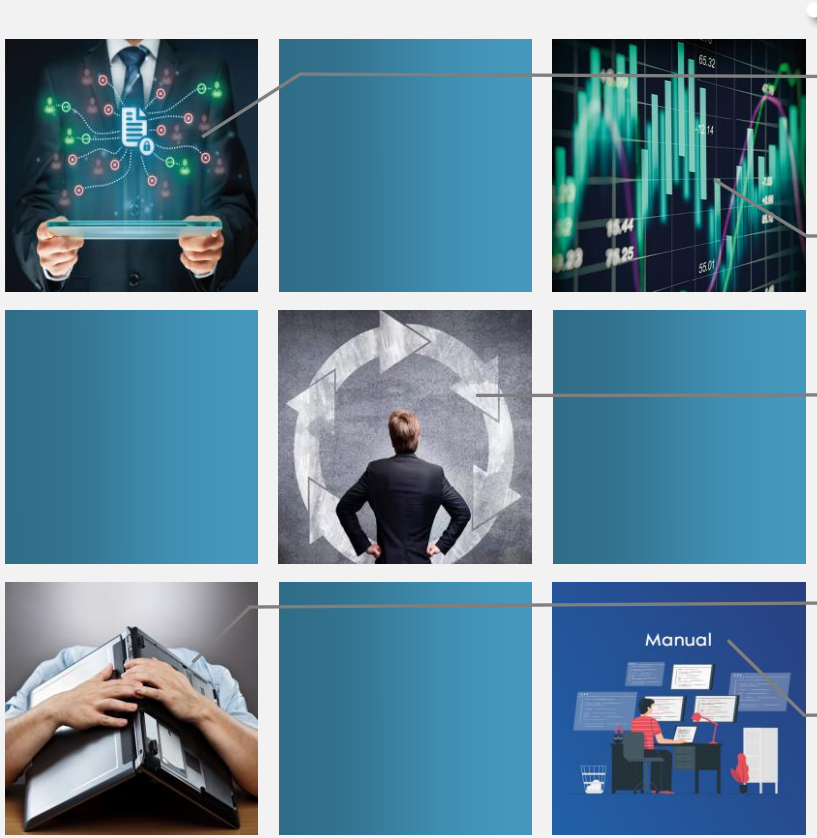
The Leaders



Gartner 2023

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EPM – Issues & Impacts



38% Difficulty in standardizing enterprise data

28% Low skills in combining financial & non-financial data

22% Employee time spent on repetitive tasks

70% Employees don't take advantage of new technology

34% Financial organizations rely on manual processes

Sources: Accenture | impactmybiz | kofax

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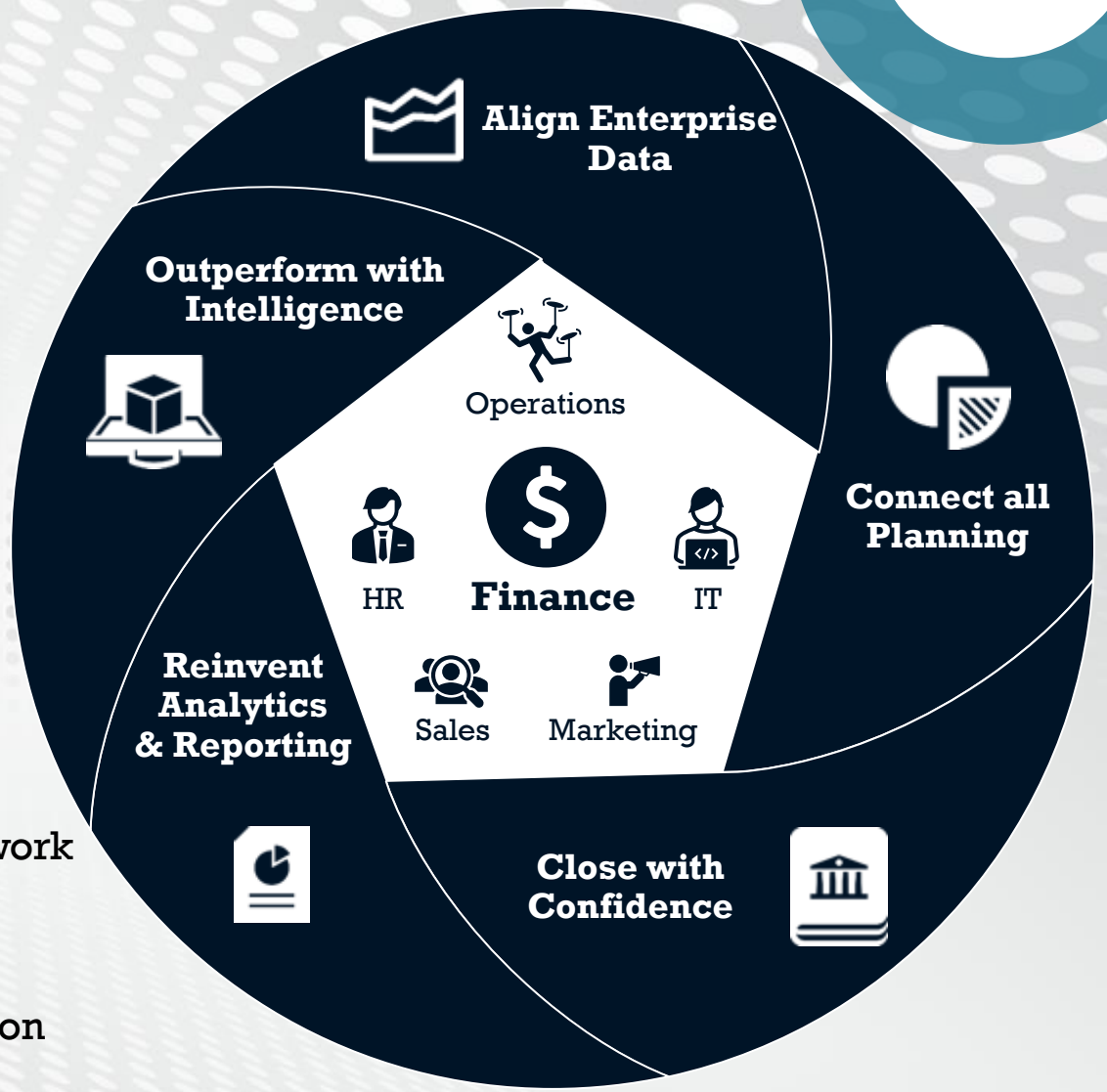
Oracle Cloud EPM – An Intro



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Oracle Cloud EPM

- Cloud-based solution for managing financial performance.
- Includes tools for budgeting, forecasting, financial reporting, & analytics.
- Offers financial consolidation and close management.
- Assist businesses in planning, executing & analyzing their financial strategies
- Connected Enterprise Planning with Line of Business/Operational Planning

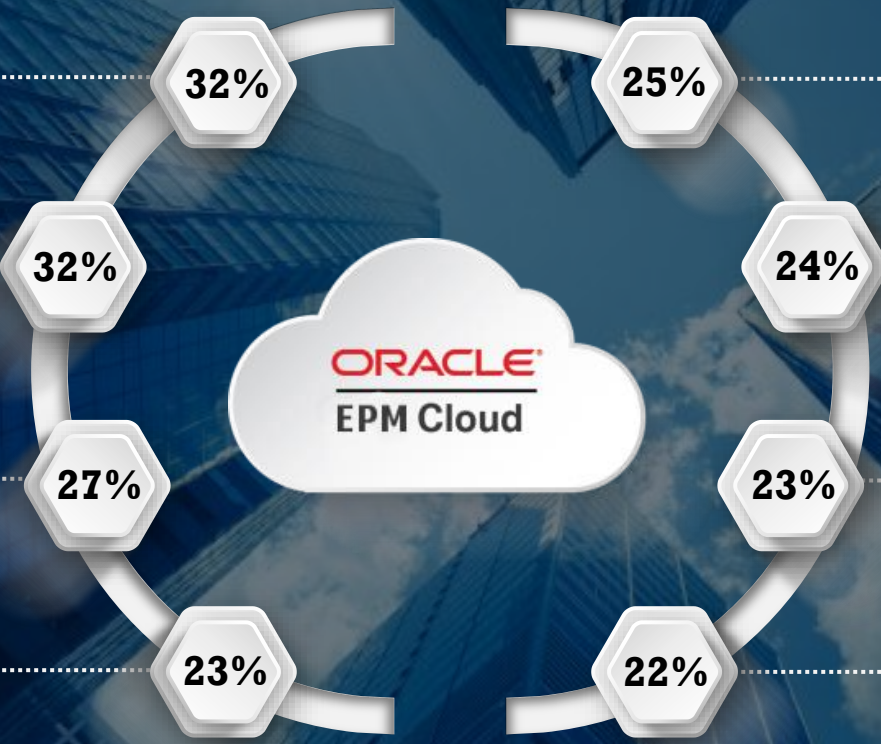


Benefits:

- Improved collaboration and communication, upgrading remote-work processes
- Lower total cost of ownership due to reduced technical debt
- Rapid access to EPM innovation, accelerating digital transformation initiatives
- Offers pre-built AI & ML technologies

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Why Oracle Cloud EPM



- Improve collaboration & communication — 32%
- Need to work better remotely — 32%
- Want to avoid on premises upgrades — 27%
- Part of digital transformation initiative — 23%
- Lower total cost of ownership — 25%
- Want to avoid infrastructure investment — 24%
- Rapid access/automatic updates to new EPM innovations — 23%
- Rationalizing multiple EPM systems — 22%

Source: Oracle

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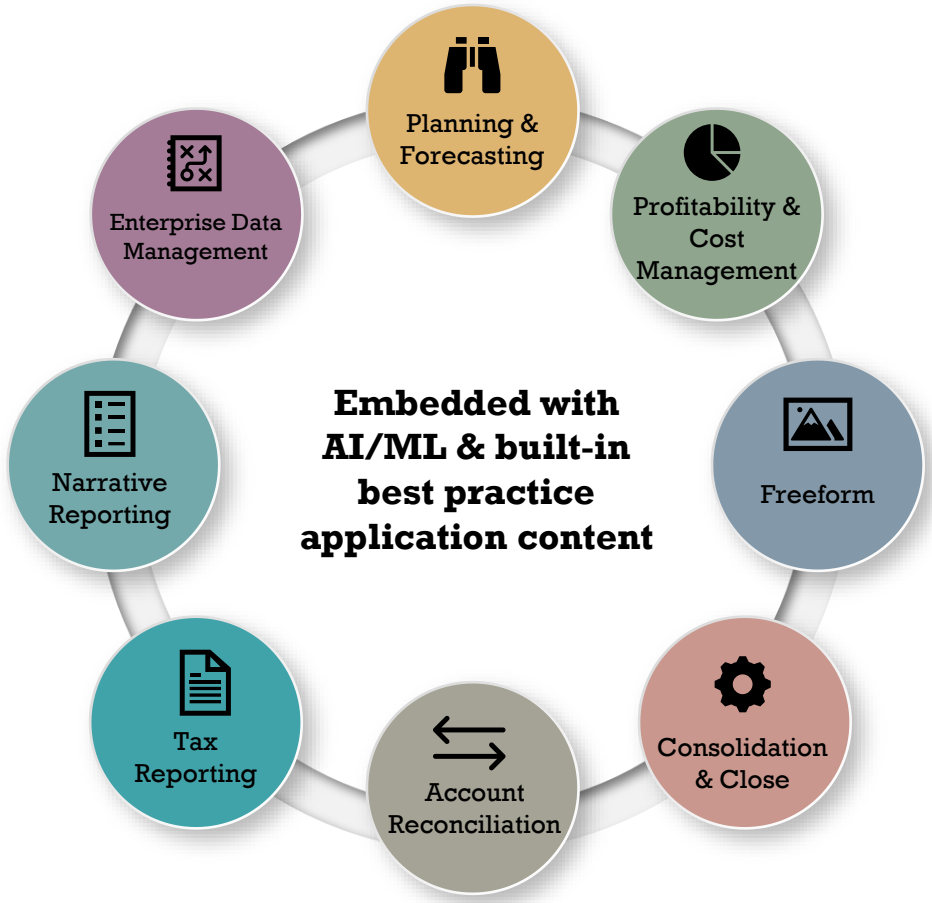
Oracle Cloud EPM – Products



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Oracle Cloud EPM – Products

- Planning and Forecasting (PBCS,EPBCS,NSPB)
- Profitability and Cost Management (PCMCS)
- Freeform
- Consolidation and Close (FCCS)
- Account Reconciliation (ARCS)
- Tax Reporting (TRCS)
- Narrative Reporting (NRCS)
- Enterprise Data Management (EDMCS)



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Planning & Forecasting

- **Scenario Modeling:** Leverage financial intelligence to rapidly model multiple scenarios to quickly respond to change.
- **Predictive Cash Forecasting:** Continuous prescriptive cash forecasts to optimize cash utilization.
- **Strategic Workforce & Workforce Planning:** Building better alignment between HR and finance for clear planning
- **Capital Asset Planning:** Better decision making on capital investments by planning for & modeling asset expenses, amortization, cash flow
- **Project Financial Planning:** Proactively manage project performance and align projects, people, & strategy.
- **Sales & Marketing Planning:** Quickly see the optimal sales territory and quota assignments and adjust as needed to meet revenue targets.
- **Integrated Business Planning and Execution:** Act on trends faster and more effectively with real-time planning & execution details
- **Intelligent Performance Management:** Embedded AI & ML monitors your plans and forecasts and alerts you to any anomalies and insights.

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Profitability & Cost Management



- Discover and act on hidden profit and costs across products, customers, & other business dimensions.
- Flexible modeling
- Calculate complex resource allocations
- What-if profitability and cost scenarios
- Pre-built graphs and KPIs
- Ad-hoc analytics using Smart View

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Freeform

- Delivers the familiar power and flexibility of Essbase with the flexibility & governance of SaaS.
- Re-imagined Essbase & Excel-based Models
- Unified reporting
- Advanced analysis and complex modeling

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Consolidation & Close

- Meet global reporting standards, including IFRS and GAAP, with a preconfigured consolidation model.
- Perform complex consolidations
- Global consolidations
- Close process orchestration
- Compliance and transparency
- Intelligent process automation



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Account Reconciliation

- Manage global reconciliation process with real-time visibility into the status of reconciliations
- Transaction matching
- Automated journal entries
- Support complex reconciliations
- Enterprise journals
- Compliance and audit support

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Tax Reporting



- Align tax with corporate financial reporting for better visibility & compliance
- Comprehensive tax provision
- Country-by-country reporting
- Tax schedules and dashboards
- Pillar Two compliance

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Narrative Reporting

- Combine management, narrative and statutory reporting needs in one solution
- Centralized direct reporting & analysis
- Collaboration and workflow
- Combine financial statements and data with comments to reports
- Publish and distribute budget books, presentations, report packages
- Leading office productivity suite integration

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Enterprise Data Management



- Enterprise application adapters
- Hierarchy and master data change management
- Real-time collaboration
- Application- and business- specific views
- Make changes to downstream applications with audit trails

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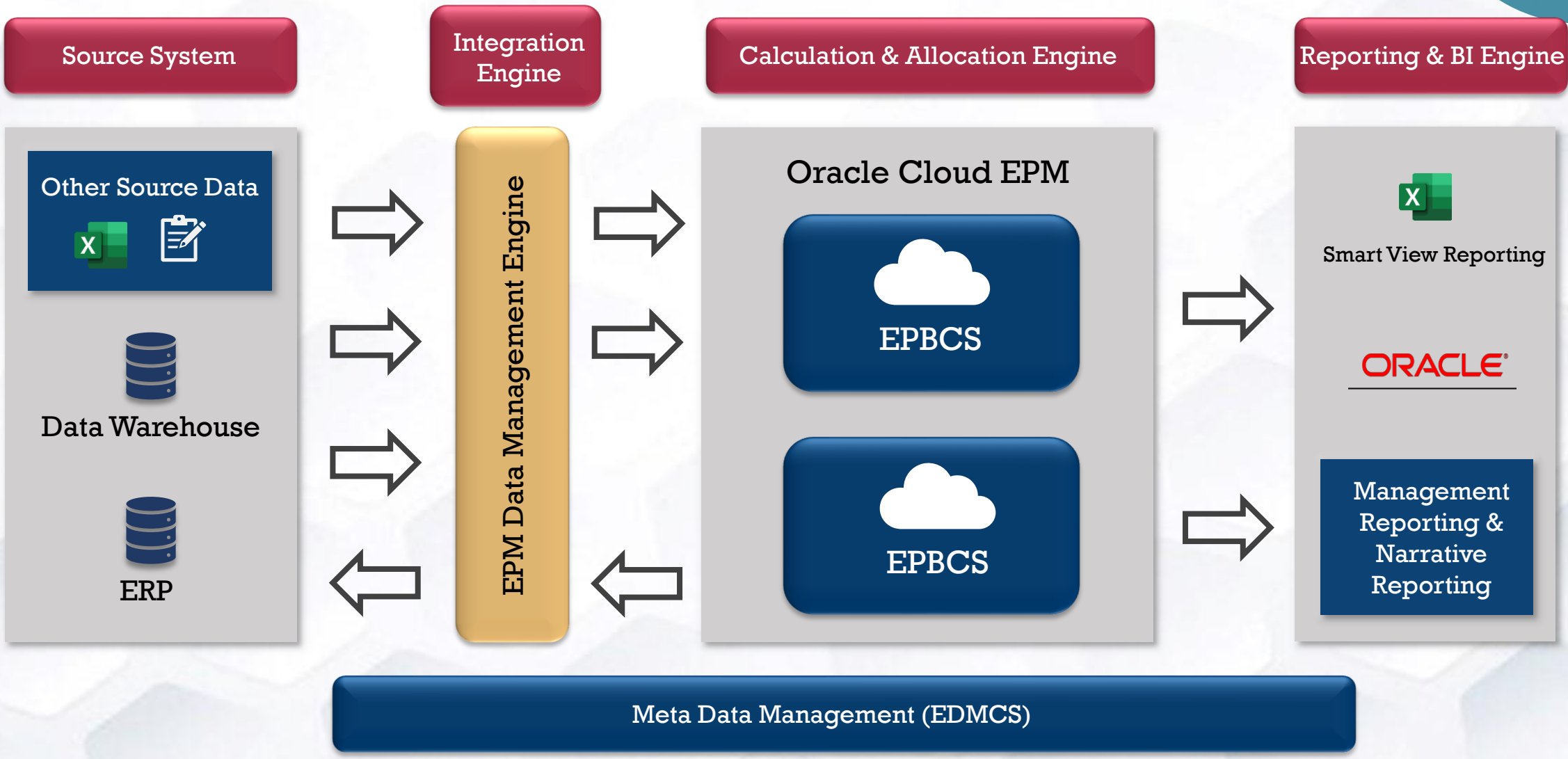
EPM for Sustainability

- Includes prebuilt KPIs and metrics, dashboards & reports
- Connect to sources to get data
- Combine narrative and data in Narrative reporting
- Create plans for sustainability initiatives
- Supports all ESG frameworks



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Oracle Cloud EPM – *High-level Solution Architecture*



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EPM Data Management Engine

- Prebuilt application integration options for data management
- Process automation for quick connectivity
- Visually configure integration parameters
- Automate data mappings
- Design, build, promote & secure internal or external APIs
- Real-time, serverless, Apache Kafka–compatible event streaming

Prebuilt Integration Options

Data Management	EPM Automate	EPM Integrator	CLI	Rest API

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EPM Stack

- Enterprise Planning & Budgeting Cloud Service (EPBCS)
- Oracle Financial Consolidation & Close Cloud Service (FCCS)
- Oracle Account Reconciliation Cloud Service (ARCS)
- Profitability & Cost Management Cloud Services (PCMCS)
- Oracle Enterprise Data Management Cloud Service (EDMCS)

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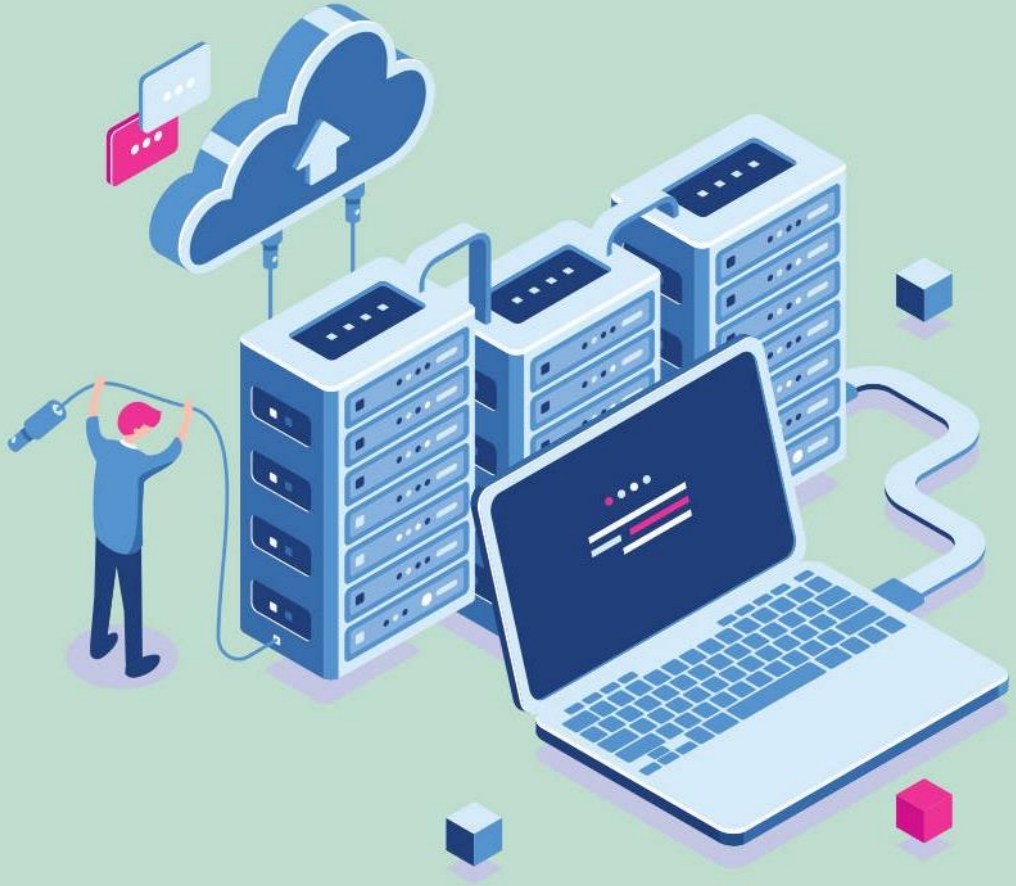
Enterprise Planning & Budgeting Cloud Service (EPBCS)

- Includes world-class budgeting and forecasting, data management, & analysis capabilities
- Offers sophisticated modeling & predictive analytical capabilities
- Can track capitalized expenses & non-financial measures of benefit
- Configurable by industry – Time & Material, Cost Plus, or Direct Revenue
- Wide choice of easy to change revenue & cashflow recognition methods



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Oracle Financial Consolidation & Close Cloud Service (FCCS)



- Cloud-based end to end solution for efficiently managing financial consolidation & close processes
- True consolidation in the cloud user experience
- Journal capabilities with configurable workflow
- Automated cash flow reporting
- Data management capabilities for integration with source systems

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Oracle Account Reconciliation Cloud Service (ARCS)

- Real-time visibility into the performance of reconciliations
- Integrates the accounts reconciliation process into the financial close
- Streamlines reconciliation processes, provides workflows for productivity
- Rules-based thresholds for automated certifications & risk assessments
- Collaboration & workflow within a compliance-driven framework
- Role-based intuitive interface



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Profitability & Cost Management Cloud Services (PCMCS)

- Focuses on allocation of resources and drivers behind costs
- Used to manage costs and analyzing profits
- Helps companies discover drivers behind profits and can segment by profitability
- Out-of-Box rule functionality makes cost allocation extremely user friendly & does not require scripting
- Custom calc-scripts for more complex allocation processes



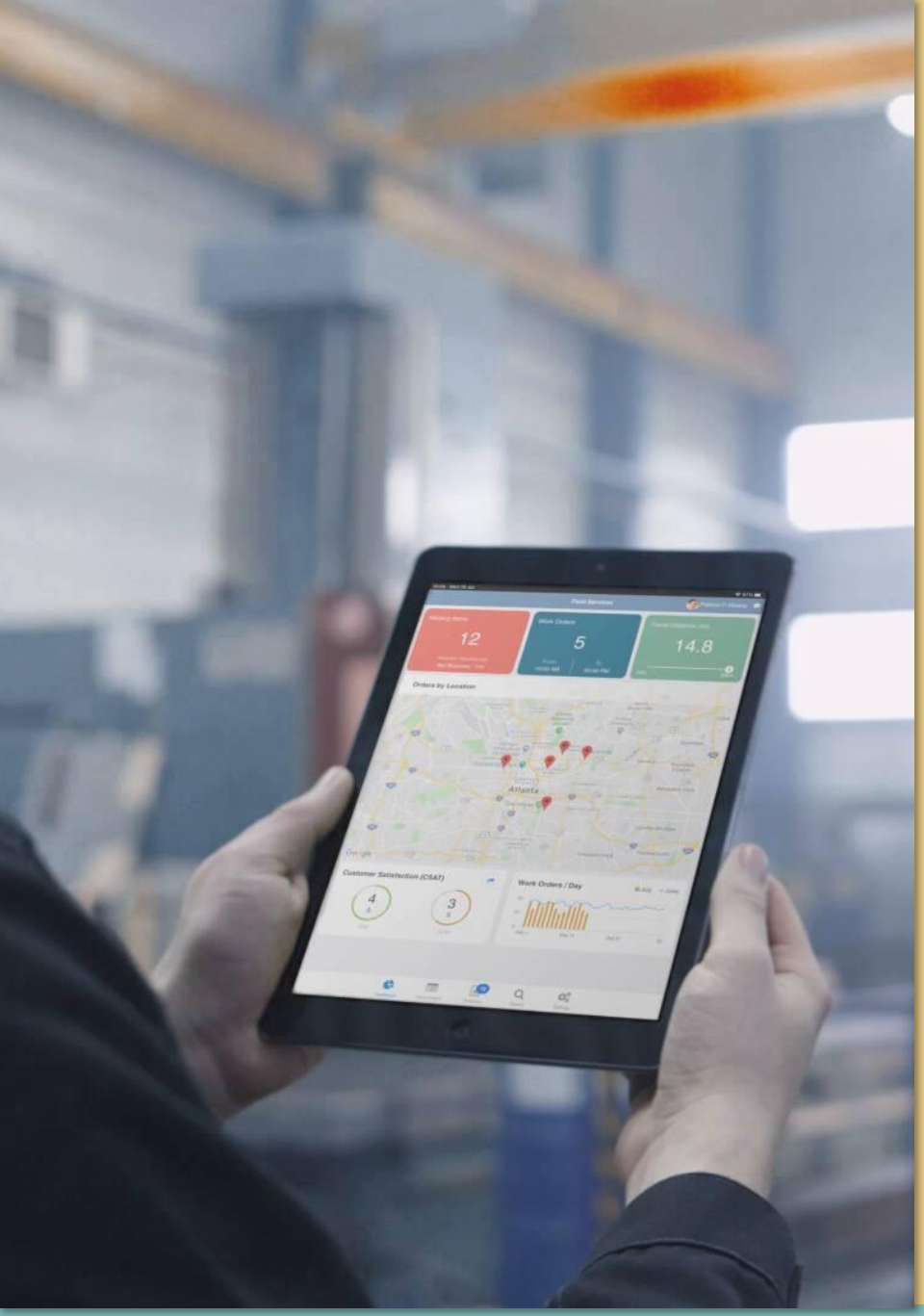
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Oracle Enterprise Data Management Cloud Service (EDMCS)

- Supports a range of patterns from secure, right-grain dimension sharing & data mapping to full-blown, multi-domain master data management
- Rapid data onboarding experience
- Integration capabilities via flat-file export
- Request-driven recorded actions
- Assimilate business transformation faster



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Reporting

- Tax Reporting
- Narrative Reporting
- Management Reporting
- SmartView Reporting
- Business Intelligence Engine
- Financial Reporting



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Use Cases by Industry



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Use Cases

Oil & Gas

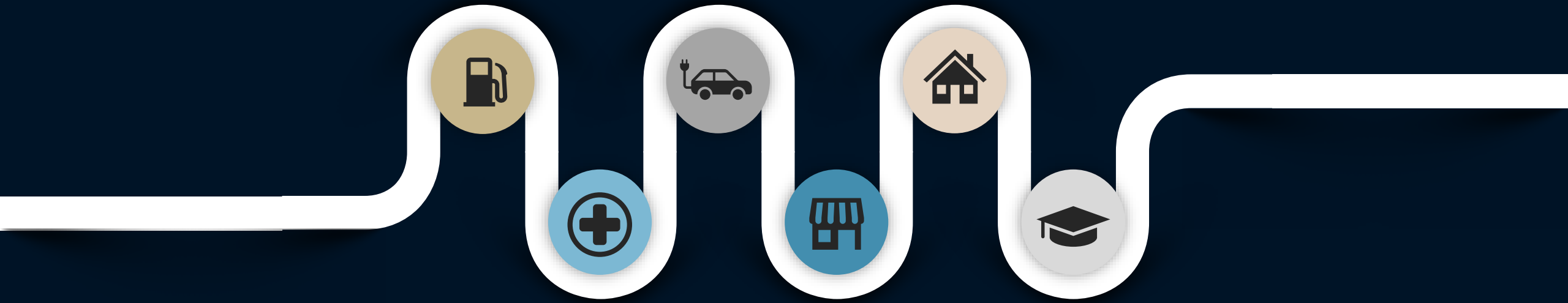
- Alternate funding options
- Volatility in oil market
- Divestitures

Automotive

- Predictive maintenance
- Real-time inventory tracking
- Quality control monitoring

Real Estate

- Rental defaults
- Mortgage deferment
- Cut capital project investment



Healthcare

- Less elective procedures
- Membership decline
- Company contributions decline

Retail & Distribution

- Store closures
- New sale channels
- Shift in customer spend
- Disruption in supply chain

Higher Education

- Enrollment mix to online
- Increased infrastructure investment
- Auxiliary event revenue decline

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SoftClouds Capabilities - Oracle Cloud EPM



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SoftClouds EPM Capabilities



Report & Analytics

Integrations

Architecture & Implementation

Training

EPM Cloud Migration Services

Maintenance & Support

EPM Cloud Strategy Consulting Services

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EPM Cloud Strategy Consulting Services



- Conducting an assessment of your landscape & environment
- Defining your EPM Cloud strategy & adoption roadmap for your organization
- Assess on-premise vs cloud fitment, timelines, change management approach
- High-level solution blueprint along with ROI analysis.
- Project Governance & Management

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EPM Cloud Migration Services

- Hyperion to Oracle Cloud EPM Upgrade
- Accelerate cloud transformation with proven tools and assets across the project lifecycle
- Enables HFM rules analysis framework, application migration toolkit
- Secure & Reliable Management of EPM Cloud
- ESS Base Cloud Services
- Data validation solution and test repository for quicker, predictive & accurate migration
- Technology installations, upgrades & migrations



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Maintenance & Support



- Cloud EPM Administration & Production Support
- Proactively monitoring Oracle EPM Cloud Applications
- Warranty Support
- Annual Maintenance Support
- Onshore / Offshore Model Support
- Manage Oracle SR
- Application Management Support
- Maturity Model – Improve/Enhance Environment

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Architecture & Implementation

- Customized Industry / Business Process based Architecture/Solutioning
- Analysis & recommendations on
  - Hardware
  - System Configuration
  - Backup & Disaster Recovery
- Infrastructure Assessment & Establishment
- Real-time Planning & Variance Analysis across Enterprise



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Training



- On-Site/Off-Site Training
- Change Management & Training
- Create User Guides/Manuals
- Admin guide for Operations Team

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Report & Analytics

- Narrative Reporting for greater transparency to financial reporting
- Self-Service, Interactive Dashboards & Data Visualization
- Rich Look & Feel of Dashboard/Analytics
- Financial Reporting - Multi entity & Multi currency
- Customized Role-Based Analytics Reports
- Performance Optimization Scorecards
- Industry Specific Analytics

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Integrations



- Realtime Data integration between Cloud EPM & ERP sources
- Integrate data from existing file system, SQL data sources
- FDMEE/Data Management
- Oracle Business Intelligence Integration
- Oracle Data Integrator (ODI)
- Other third-party tool recommendations & integration

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Customer Success Stories



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About Customer 1





- Japanese multinational automaker in Fuchu, Hiroshima, Japan
- Engages in Sky Active technology for newest generation auto makers
- Retail revenues advanced 6% to $8.37B from January-March 2024

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Challenges Faced



- No vendor support for existing version of Hyperion
- Metadata sync between the applications.
- High costs of administration, overpayments or unexpected operating costs
- Scaling up of existing architecture to meet business requirements
- System performance for user inputs and calculation time
- Cloud EPM services availability

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The Solution

- Migrated to Oracle Cloud EPM.
- Redesigned metadata sync to align with DRM.
- Migrated to shared DB, reducing operating costs.
- New architecture enables seamless scalability.
- Calculations and forms optimized for user experience.



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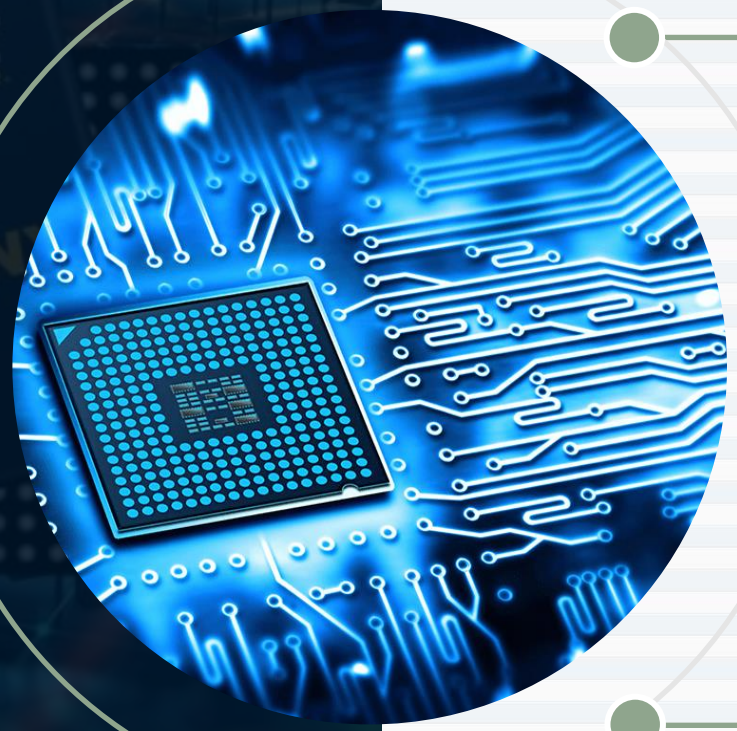
The Results

- Offers fixes and updates for Oracle Cloud EPM until 2030.
- DRM syncs metadata with Oracle Cloud EPM.
- Database team handles maintenance and patches.
- Aligning with business growth in data and users.
- Quick access to forecasts and budgets.
- System ensures continuous availability.
- No downtime for timely reporting.



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About Customer 2



- American Multinational Semiconductor Company Spanned over across America, Canada, Singapore, China & Malaysia
- Engages in communications, computing, industrial, automotive & consumer markets
- Revenue: **$737.2M in 2023**

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Challenges Faced

- Sales Team using traditional excel based Sales planning & forecasting.
- Current process is very complicated & cumbersome process.
- Requires lot of manual work & high cost in traditional based approach.
- There is no central repository to maintain data for forecasting process.
- There is no proper reporting framework to view and analyze data.
- There is no Audit Tracking in terms of data changes.



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The Solutions



- Implementing fast paced end to end Oracle EPBCS sales planning cloud application.
- Integrated Data load and Metadata build process from end to end.
- Implemented Quota Planning, sales forecasting and Key Account Planning.
- Setting up security matrix to restrict and view data other territory sales team.
- Educated user on how to view and analyze data by using Smart View plugin.
- Implemented custom outbound process to view data in third party reporting tools.

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About SoftClouds



Founded
2005

Other Locations
Hyderabad, India
Delhi, India
Tokyo, Japan

Oracle Platinum Partner

COPADO Certified Partner

Headquarters
San Diego, CA

Target Market
Majors & Enterprise

Salesforce Ridge Partner

AWS Partner

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Why SoftClouds?

Proven & Global customer experience expertise

Understanding today's need and vision for tomorrow's demand

Deep technical expertise in Oracle, integration & mobile & platforms

Preconfigured ERP cloud Solutions



Expertise in maximizing client satisfaction and loyalty

Trusted partner with innovative mindset & immense digital transformation expertise

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Next Steps…

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THANK YOU

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GVP – Global Strategic Sales

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