



**Deloitte Planning
Cloud for Oracle**

Transform planning,
budgeting and forecasting

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Why businesses are considering the Cloud

The challenges

Planning, budgeting and forecasting (PB&F), financial consolidation, and reporting are critical components of Enterprise Performance Management (EPM). On an increasing basis, modern-day businesses are seeking to gain benefits from the deployment of EPM solutions in the Cloud. CFOs and CIOs are demanding more from their business systems and their ability to give insight into information and to support decision making.



Analytics

Only 44% of companies have the analytical tools they need to: support decision making, improve execution efficiency, comply with regulation and identify growth opportunities.



Collaboration

Social networks are influencing the collaboration that occurs within the enterprise. These networks, empowered by new tools, will change the way employees work together, and drive new efficiencies.



Mobility

88% of CFOs and IT executives believe that mobility, the use of mobile devices, will be the most important technology for their companies' success in the next three years.



Agility and Scalability

In today's dynamic business environment, it is no longer acceptable to take years to implement a system. Businesses need systems to scale and flex on demand and within much shorter timeframes.



Lower cost

All of the above must be achieved at a lower cost of ownership, with the ability to pay as you go, using an agile, cheaper approach to implementation.

Why Cloud?

- The Cloud provides organisations of all sizes with the opportunity to subscribe on a per user basis to specific modules (for example, PB&F, financial consolidation and/or reporting). These modules form the basis of your EPM solution.
- You can implement modules as required, and in a shorter timeframe than traditional software packages.
- Cloud applications offer broad, rich and proven functionality, which is regularly updated without needing to invest time and money in upgrade projects.
- You can easily access the Cloud from a web browser or mobile device with Internet access, there is also no need for you to invest in additional infrastructure.

In an April 2015 Forrester report, author Paul Hamerman, VP and Principal Analyst, makes a recommendation to “migrate from outdated EPM products to SaaS [Cloud] in order to assimilate software innovation more quickly.”

**“The EPM Market Landscape Responds To The Growth Agenda And Digital Disruption”,
Forrester Research, Inc.**

Deloitte planning Cloud *for Oracle*

The **Deloitte Planning Cloud for Oracle** is an out of the box, rapid and fixed price service to transform the planning, budgeting and forecasting processes within your organisation.

It is based upon our experience of transforming planning, budgeting and forecasting processes for some of the biggest companies. It is built upon Oracle's Enterprise Planning and Budgeting Cloud Service (EPBCS).

The **Deloitte Planning Cloud for Oracle** is available for the following planning, budgeting and forecasting process areas:

“ Oracle are extremely excited about the launch of the Deloitte Planning Cloud. It provides all of our customers with the opportunity to benefit from access to Deloitte's global experience of transforming planning, budgeting and forecasting processes.”

Rod Johnson, Group Vice President, Oracle



Staff Cost & Compensation Planning



Expense Planning



Balance Sheet Planning



Cash Flow Planning



Project & Programme Planning



Capital Planning



Strategic Workforce Planning

Oracle enterprise planning and budgeting Cloud service

Oracle's Enterprise Planning and Budgeting Cloud Service (EPBCS) is based upon the market-leading Oracle Hyperion Planning, but built and optimised for the Cloud. EPBCS offers world-class planning, budgeting and forecasting with the simplicity of the Cloud, including market leading "out-of-the-box" modules for:

- Fully integrated financial statement planning (income statement, balance sheet and cash flow)
- Strategic workforce planning
- Capital expenditure planning
- Project financial planning (including capital projects, indirect projects and contract projects)

The modules deliver:

01. Best practice planning and forecasting content that is available when you need it

Start small; the solution allows you to only use the features and processes that you need, allowing you to mature your planning process over time. In other words, features can be "incrementally enabled". For example, you can begin with basic expense planning in year one, then add revenue planning or workforce planning at a later date.

02. Upgradable and configurable

Get the best of both worlds. Oracle content can be combined with customer-specific content. Yet, your system is automatically upgraded by Oracle.

03. Empower the business user

Easy-to-use administration wizards allow business users to maintain the system in the context of the business problem. This allows you to take more control of your business processes.

Oracle Delivers

- Embedded predictive analytics.
- Accurate cost allocation to drive profitability.
- First-in-class functionality.
- Planning across the enterprise.
- Speed-of-business reforecasting to meet changing business conditions.

Benefits

- Plan and report faster, in more detail, with more accuracy and insight.
- Drive growth by containing costs.
- Specialised functionality provides the right tools for the right job.

"The Oracle Enterprise Planning and Budgeting Cloud Service (EPBCS) takes planning in the Cloud to the next level. It supports enterprise-wide, driver based planning, budgeting and forecasting across multiple process areas. It provides our customers with the opportunity to rapidly implement a world class solution."

Martin Jermyn, Deloitte Planning Cloud Lead

Your journey to the Cloud with the Deloitte planning Cloud *for Oracle*



Pick a Deloitte planning Cloud package to suit you

We are all unique. Recognising that every business is different, we have created three Deloitte Planning Cloud packages so that you can choose the solution that best fits your needs and ambitions.

PREMIER	<p>The Premier package is the entry level of the Deloitte Planning Cloud. It is based upon the standard Deloitte Planning Cloud template, which results in a rapid implementation timeline and an attractive per user, per month fee.</p> <p>It is suitable for businesses who have standard requirements, who want to adopt good practice processes, and want their new Cloud based planning, budgeting and forecasting tool to reflect industry good practice.</p>	Process Areas	✓	Pick 1 process area from those available
		Business Requirements	✓	Standard Deloitte Planning Cloud business requirements
		Business Processes	✓	Standard Deloitte Planning Cloud business processes
		Setup & Configuration	✓	Standard Deloitte Planning Cloud business setup and configuration
		Historic Data Conversion	✗	–
		Data Load Mechanism	✓	1 x Standard file based data load mechanism
		Timeline	🏁	Go-live from 8 weeks
		Training & Knowledge Transfer	✓	5 days of training & knowledge transfer for your administrators
		Post Go-Live Support	✓	5 days of post go-live support
		On-Going Support	✓	6 days of on-going support per year
		Minimum No. of Users	👤	10 Users
		Minimum Length of Service	✓	3 Years
		Price (per user, per month)	£	Price on application (billed annually)

ENHANCED	<p>The Enhanced package is suitable for businesses who may need to tailor the standard Deloitte Planning Cloud template.</p> <p>It is suitable for clients that have slightly more complex requirements, who want to adopt good practice processes but need a little bit of extra flexibility.</p>	Process Areas	✓	Select 2 process areas from those available
		Business Requirements	✓	Standard Deloitte Planning Cloud business requirements, tailored to your business
		Business Processes	✓	Standard Deloitte Planning Cloud business processes, tailored to your business
		Setup & Configuration	✓	Standard Deloitte Planning Cloud business setup and configuration, tailored to your business
		Historic Data Conversion	✗	1 Year
		Data Load Mechanism	✓	2 x Standard file based data load mechanism
		Timeline	🔄	Go-live from 12 weeks
		Training & Knowledge Transfer	✓	10 days of training & knowledge transfer for your administrators
		Post Go-Live Support	✓	10 days of post go-live support
		On-Going Support	✓	12 days of on-going support per year
		Minimum No. of Users	👤	20 Users
		Minimum Length of Service	✓	3 Years
		Price (per user, per month)	£	Price on application (billed annually)

UNLIMITED	<p>If your business has complex requirements, differing business processes or a greater appetite for business change, then the Unlimited package is for you.</p> <p>Our Deloitte Planning Cloud specialists will work with you to understand your challenges and aspirations in order to provide a comprehensive proposal that meets your business needs.</p> <p>While this option may not provide you with a fixed timeline and cost, you will be provided with the same expertise offered by our Premier and Enhanced packages.</p>	Process Areas	✓	Pick any combination of process areas
		Business Requirements	✓	Business requirements captured from your key business experts
		Business Processes	✓	Business processes designed based on your requirements
		Setup & Configuration	✓	Setup and configuration based on your requirements
		Historic Data Conversion	✗	Historic data conversion based on your needs
		Data Load Mechanism	✓	Data load mechanisms based on your needs
		Timeline	🔄	Timeline based on your requirements
		Training & Knowledge Transfer	✓	Training and knowledge transfer based on your needs
		Post Go-Live Support	✓	Post go-live support based on your needs
		On-Going Support	✓	On-going support based on your needs
		Minimum No. of Users	👤	30 Users
		Minimum Length of Service	✓	3 Years
		Price (per user, per month)	£	Price based on your needs and requirements

We give you the extras you might need

Every **Deloitte Planning Cloud** package includes the following:



Deloitte Process Library

We recommend that you adopt standard planning, budgeting and forecasting processes to get the maximum benefit from your new Cloud based planning, budgeting and forecasting tool. The **Deloitte Process Library** is a collection of good practice process flows and process documentation templates, taken from our extensive global experience of transforming planning, budgeting and forecasting processes in some of the biggest companies.



Deloitte Learning Centre

The **Deloitte Learning Centre** gives your end users access to a wide curriculum of self-guided training courses. The courses include a mix of demonstrations, videos, and quizzes. We have developed a successful training programme that keeps learners hungry for more. The **Deloitte Learning Centre** is updated as and when new and improved functionality is released, so your users are always up to date.



Deloitte Help Centre

We know that you will need guidance, help and support after adopting your new Cloud based planning, budgeting and forecasting tool. The **Deloitte Help Centre** is designed to help you, help yourselves. The **Deloitte Help Centre** provides you with access to a regularly updated, self-service knowledge base and also to our online community of other **Deloitte Planning Cloud** customers and Deloitte experts.



Deloitte Testing Suite

Planning, budgeting and forecasting is a critical business process and we understand that everyone will want to ensure that their new Cloud based planning, budgeting and forecasting tool works as expected. This is why the **Deloitte Testing Suite** includes test script templates and access to our online test management tool during the implementation of your new Cloud based planning, budgeting and forecasting tool to ensure everything goes to plan.



Deloitte Cloud Release Service

One of the many benefits of purchasing Software as a Service (SaaS) is that you gain access to new and improved functionality on a regular basis – usually every quarter. The **Deloitte Cloud Release Service** ensures you get the most out of this new and improved functionality. We will provide you with advanced notice of upcoming changes, explain what the changes are, explain how you might be able to use the functionality, and provide suggestions as to how you might prepare your end users.

Contact us to find out more

For more information on the Deloitte Planning Cloud please visit www.deloitteplanning.cloud or contact:



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