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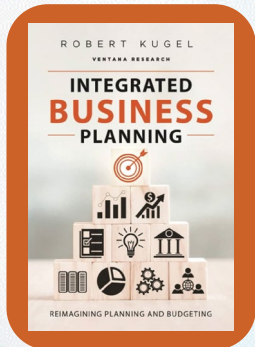
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# Innovations in Integrated Business Planning and Performance

Ventana Research Digital Summit



**Robert D. Kugel** CFA  
Executive Director,  
Business Research



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# Why Plan?

**What's happening?**

**How can we address our opportunities and issues?**

**What happens if?**

**What do we do then?**

**What's the impact on the workforce?**

**Do we have the capacity?**

**Can we substitute x for y?**

**What's the impact on our financial statements?**

# Market Observations



**1.** AI and Generative AI will profoundly affect planning and budgeting.

**2.** Gaining agility to respond rapidly with intelligence is a priority.

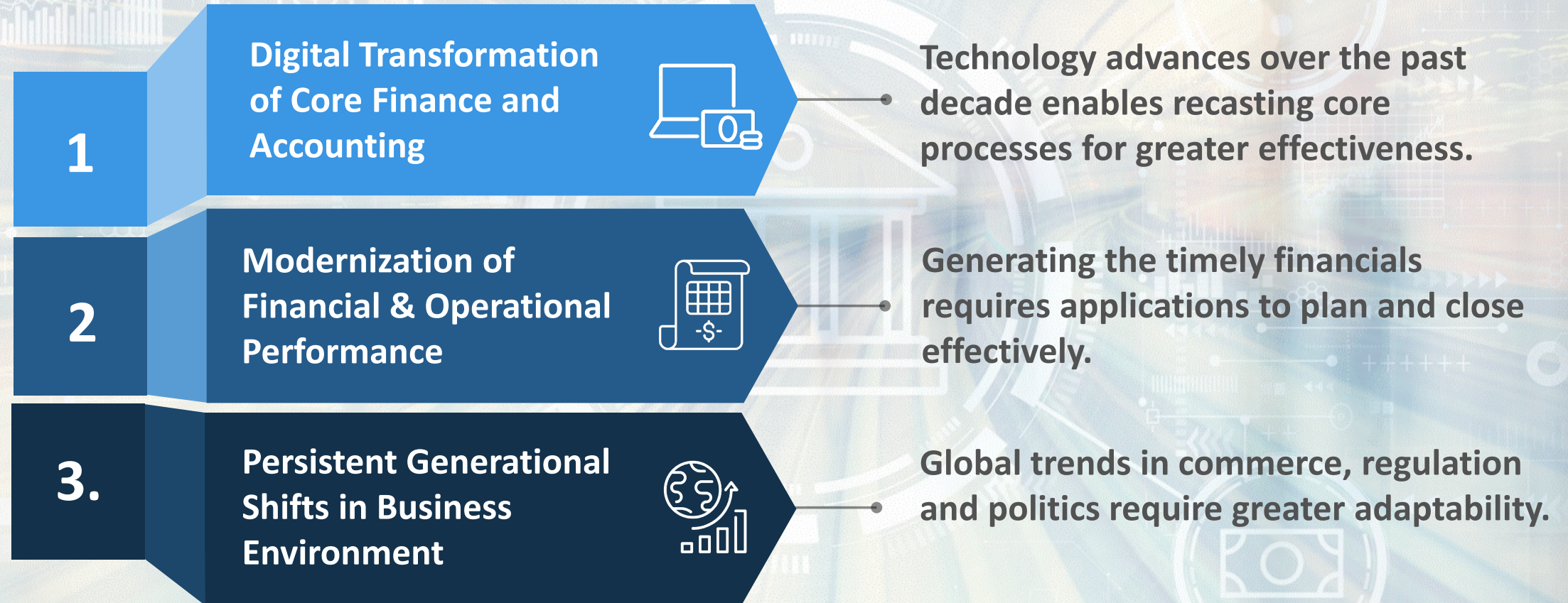
**3.** “Data pantries” restructuring planning, analysis and reporting.

**4.** IBP makes planning a management tool for better performance.

**5.** ESG compliance cascading goals to individual objectives.

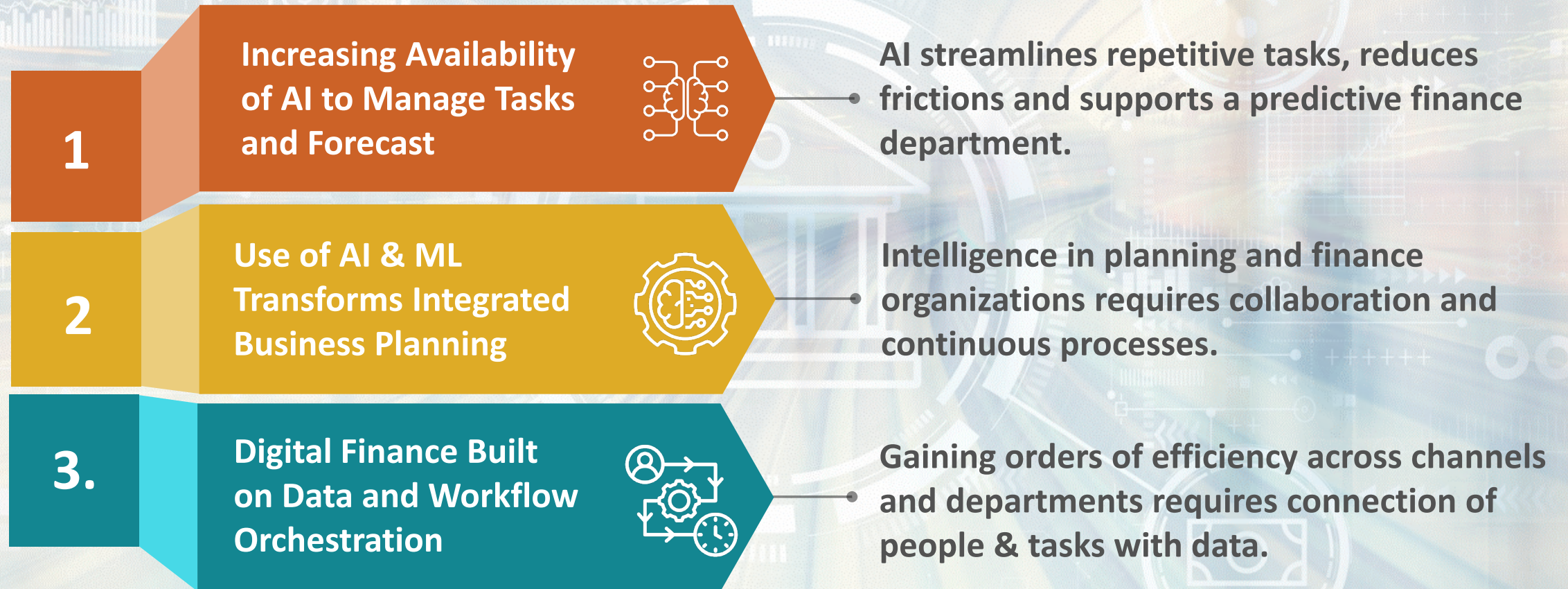


# Business Trends in Planning and Budgeting





# Technology Trends in Planning and Budgeting



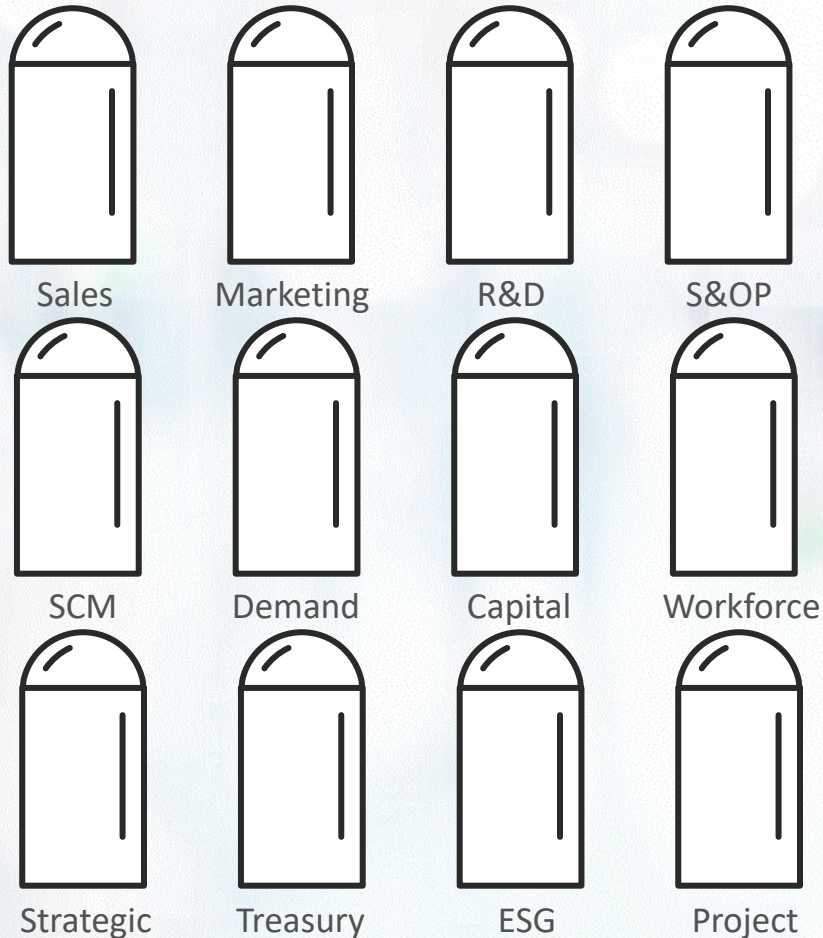


# Planning and Budgeting: Separate and Linked





# Business Planning

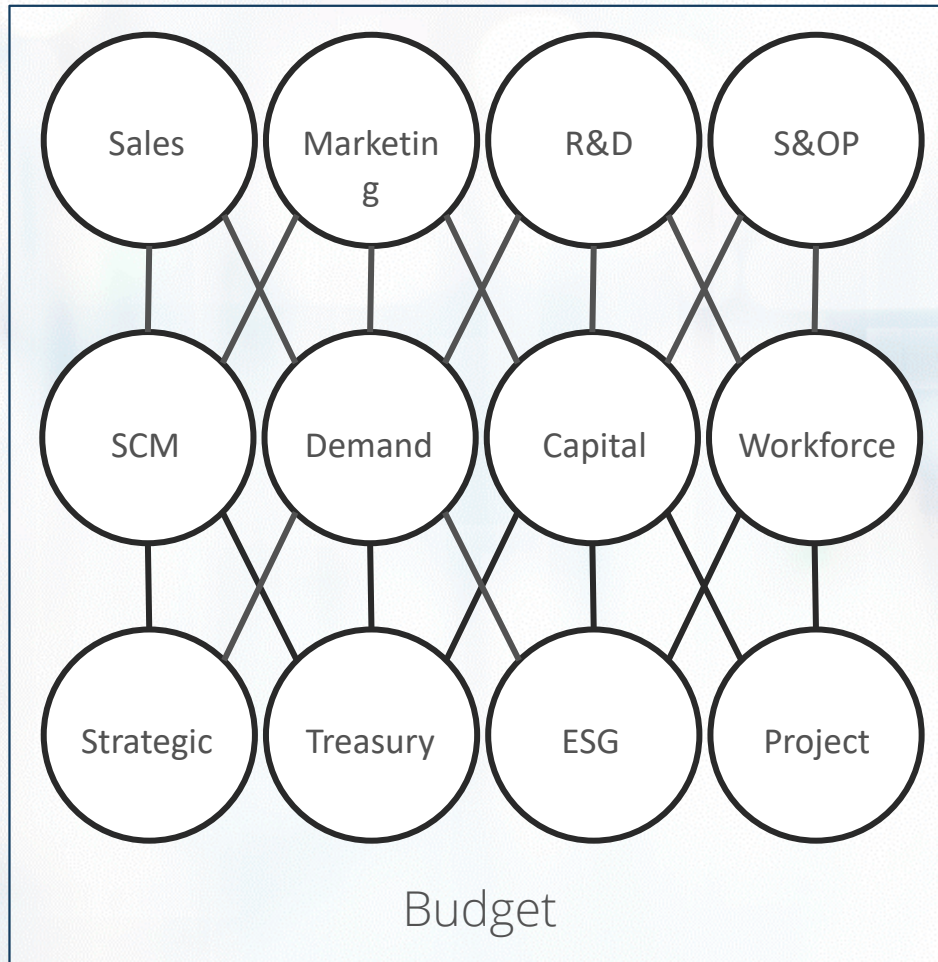


## Organizations do a lot of planning:

- Silo-based
- Different assumptions
- Not well coordinated
- Inaccessible
- Limited participation
- Limited value to leadership team



# Integrated Business Planning



## Business management-focused:

- High participation
- Collaborative
- Aligned
- Things and money
- Agile – rapid cycles
- Action-oriented



# Business Planning

## *Market Assertion*

By 2026, one-fourth of FP&A organizations will have implemented integrated business planning, bringing together operational and financial planning on a single platform to improve the business value of planning and budgeting.



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SVP & Research Director



# Planning for Performance Management



See more.



See more sooner.



Adapt quickly.



Coordinate  
response.



Promote  
accountability

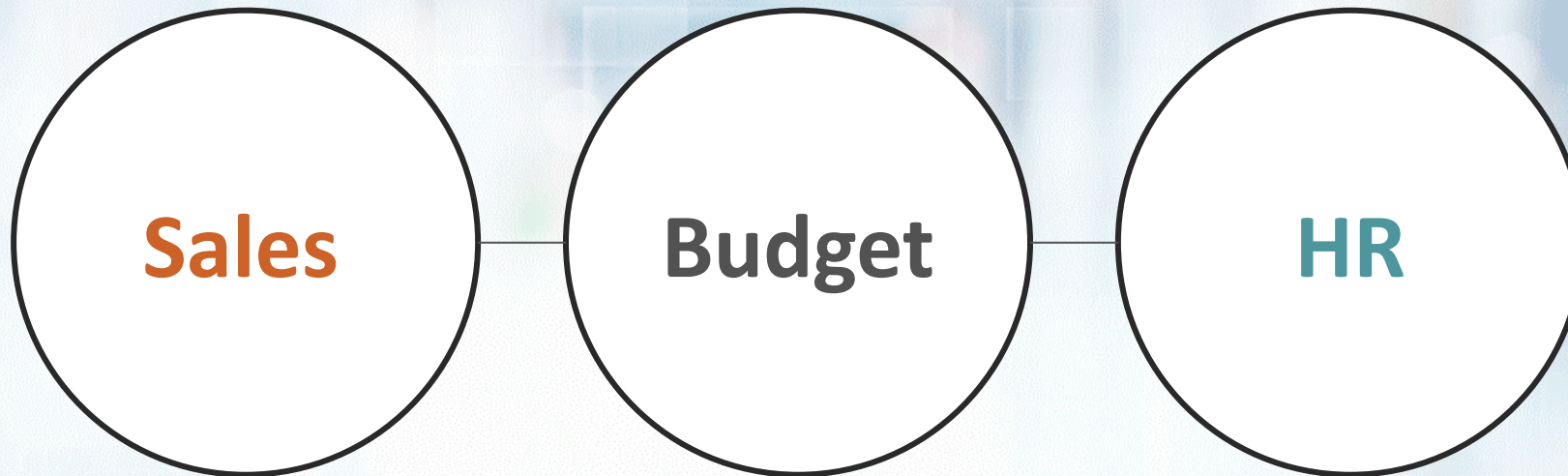


Multi-lens insights



# Moving to Integrated Business Planning

Dedicated software offers some degree of integrated planning out of the box:





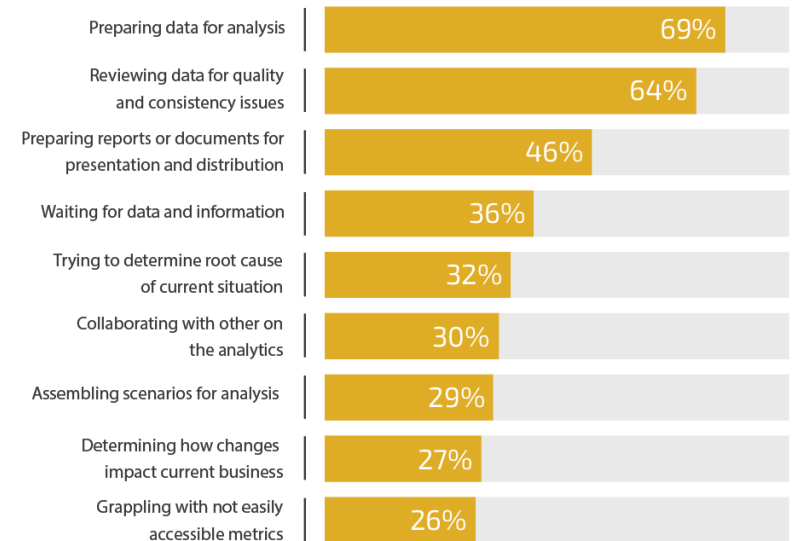
# The Data Challenge

## Data quality and availability is a barrier to improving planning.

- Our research found that 69% of participants spend the majority of their time preparing data and 67% on reviewing data for quality and consistency.
- Issues with data slow down planning, analysis and reporting cycles.
- A “data pantry” is an essential part of a planning platform, especially for predictive analytics

### Majority of Time Spent Analyzing Data

64% cite reviewing data for quality and consistency



Source: Ventana Research  
Analytics and Data Benchmark Research  
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# Available Now

## Vendors are rapidly adding AI-enabled capabilities:

- Anomaly detection.
- Demand planning at a desired level of granularity (even SKU) incorporating impacts of scheduled promotions, events, calendar and external factors.
- Driver-based forecasting aligning sales, labor, material costs and inventory.
- Cash management, including revenue, A/R, A/P, capital and bank balances.
- Conversational analytics
- Automated annotations and storytelling.





# Coming Soon

**Although theoretically possible today, the following will be available (mostly) out of the box within 3-5 years:**

- Auto-generated integrated first draft operating plan/ budget
- Goal seeking with trade-offs
- Demand planning with constraints
- Automated analytics
- Automated driver/KPI discovery
- Cross-functional intervention notifications.
- Tax expense optimization.
- Generative AI report generation.



# Innovating Planning and Performance



AI and data platforms are bringing Integrated Business Planning within reach.



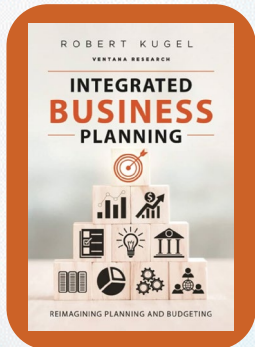
Technology that facilitates coordinated operational and financial planning, analysis and reporting provides the senior leadership team, executives and managers with the ability to improve performance.



Technology builds situational awareness, agility and responsiveness while providing insights to make better decision more consistently.



# Innovations in Integrated Business Planning and Performance Building Value for Organizations



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# Robert Kugel – Executive Director



[@rdkugelVR](https://twitter.com/rdkugelVR)

**Passion:** Make finance and accounting cool (again). Eliminate the tedious and focus on continuous improvement to improve performance using software. Keep it real: I'm deep in technology futures but read accounting bulletins.

**Expertise:** Since 2003, Robert has led the Office of Finance research practice focusing on the intersection of information technology with the finance and accounting to line-of-business departments.

**Experience:** He has been a technology analyst for 30+ years, with the perspective that brings. But the practice is focused firmly on what's next.

**Research:** His research covers the full range of finance functions (accounting, FP&A, tax, treasury, and corporate finance) along with the software that supports these functions such as ERP, performance management, tax provision but also in price optimization and S&OP.

**Background:** Robert was an equity research analyst (Credit Suisse, Morgan Stanley and Drexel Burnham) and a consultant with McKinsey & Company. He earned his BA in Economics/Finance at Hampshire College, an MBA in Finance/Accounting at Columbia University, and is a CFA charter holder.



# Questions?



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LinkedIn

<http://www.linkedin.com/company/ventana-research>



Analyst Perspectives

<http://blog.ventanaresearch.com>



Electronic Mail

[researchteam@ventanaresearch.com](mailto:researchteam@ventanaresearch.com)

[info@ventanaresearch.com](mailto:info@ventanaresearch.com)



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<https://www.linkedin.com/in/robertkugel/>



My Analyst Perspectives

<http://robertkugel.ventanaresearch.com>





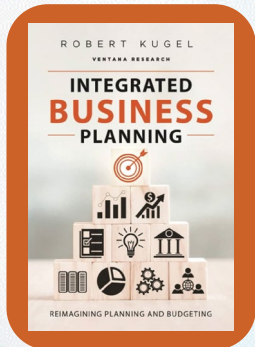
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