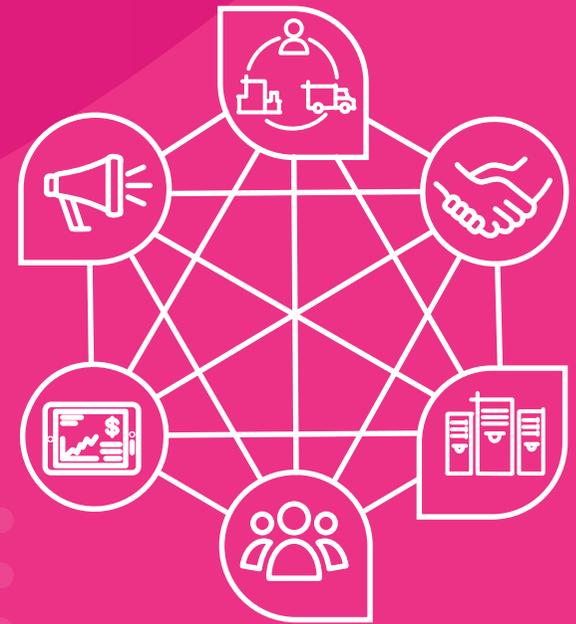




Adaptable planning across the organization

# The ultimate guide for integrated business planning



# Contents

- 3 The power of integrated business planning
- 4 See the big picture
- 5 Reap the benefits of integration
- 6 Achieve adaptable planning
- 7 Create a single source of truth
- 8 What makes Jedox stand out?
- 9 Success story: Sanofi
- 10 Success story: Canon
- 11 Six key considerations
- 12 The road ahead



# The power of integrated business planning

The classic financial planning approach is organized by function and linear. Each team functions in a silo with its own process. Consequently, a lot of time is spent putting the pieces of “the big picture” together.

How can organizations eliminate these silos and achieve the adaptability and resilience required to act decisively in turbulent times? And what is the best path to collaborative financial planning that enables confident decision-making? This is where integrated business planning (IBP) comes in.

IBP connects finance, sales, HR, operations, and supply chain, integrating all the data that matters from across the organization. This helps eliminate traditional barriers, bridge performance management gaps, and adds richer context to the numbers. IBP delivers a more complete picture of an organization and its performance, giving teams the exhilarating feeling of working smarter, collaborating better, and hitting the mark.



# See the big picture

## The impact on finance, sales, HR, IT, and beyond

Moving from siloed planning to IBP helps individuals and teams across departments collaborate using a single, unified platform, so even the most complex businesses can accomplish straightforward planning. This allows departments to uncover opportunities, discover gaps in the business landscape, and develop a range of scenarios. The result is better decisions and better insights across the organization.

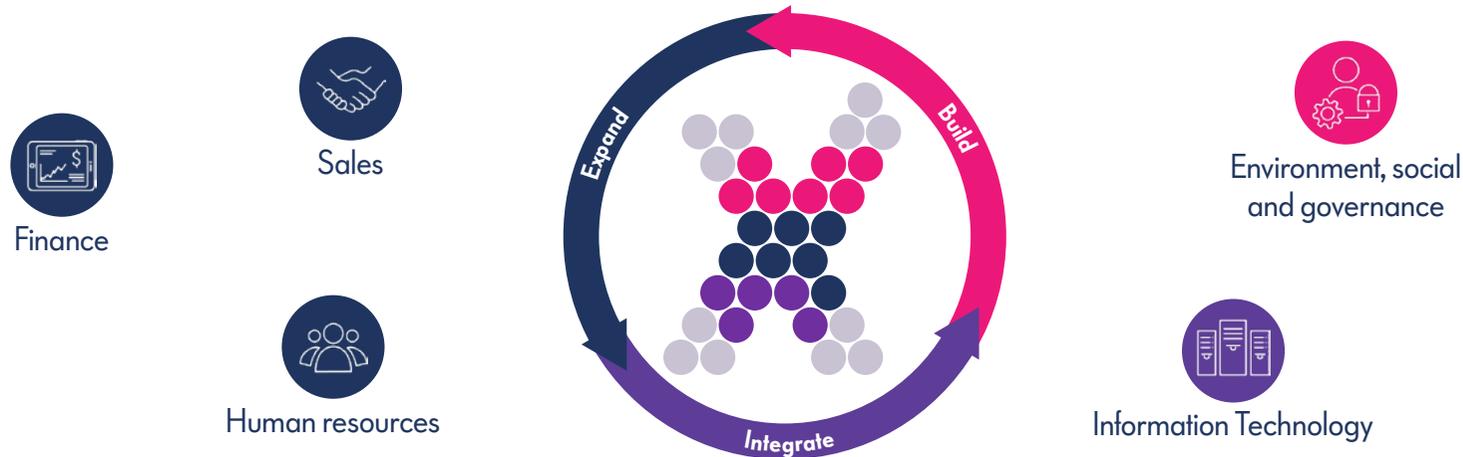
### What is IBP?

**Iterative:** instead of waiting for the handover between the teams, the different views of decision-makers in the organization flow together to continually refine the plan

**Collaborative:** instead of siloed planning, cross-functional teams across finance, sales, HR, and more come together to exchange information and make confident decisions together

**Consistent:** no need to prepare figures provided by one group for another, because key metrics are aligned across all groups

**Strategic:** plans and decisions are nonreactive – they are based on the big picture and support mid- and long-term business strategies



# Reap the benefits of integration

Moving from siloed departments and disparate systems to integrated planning eliminates inconsistent reports and forecasts, which contribute to a lack of transparency and duplicated efforts. IBP makes such a difference because it enables teams to unify their financial and operational planning processes within a single platform. IBP solutions, such as Jedox, deliver exactly that: unified, cross-organizational data and seamless data integration with existing enterprise systems in the cloud or on premise, including Salesforce, Microsoft Dynamics, SAP, and Oracle.

## IBP helps achieve:

- > Quick user adoption by leveraging Excel and other familiar Microsoft solutions
- > Seamless planning, reporting, and analysis across the organization
- > Financial self-service from a single source of truth
- > Unified system for a one-stop shop
- > Simple low-code/no-code integration requiring fewer technical resources to stand up and maintain
- > Convenience and efficiency by unifying input across the organization
- > Incorporation of any kind of data from any source across the organization



# Achieve adaptable planning

In today's digital-first, hybridized environment, traditional quarterly planning is insufficient to support the increased need for adaptability and resilience. Enterprises must be able to pivot quickly as data volumes continue to increase and global issues persist, including uncertain local and global markets, supply chain disruption, and fierce competition. Simplified, adaptable planning is how you get there.

Adaptable, quick decision-making has never been more vital. If financial, operational, and strategic teams do not have the ability to immediately orchestrate and match their actions to dynamic markets, they cannot keep pace.

That's why it is critical that planning solutions deliver cross-organizational, collaborative, and straightforward planning that mirrors the contours of a business through artificial intelligence (AI) and other advanced technologies. That can only happen if an organization's people, planning, processes, and data are unified in one single solution. Jedox, the world's most adaptable planning and performance management platform, integrates data from any source and across all business systems to create a unified plan and single source with all the data that matters.

“

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

Head of Controlling  
Fiat

# Create a single source of truth

Many different systems and solutions can be combined and integrated with Jedox, including finance, sales, marketing, HR, procurement, and more.

## The result is a single source of truth that enables:

- > Simplified planning, analytics, and reporting
- > Collaborative demand planning and forecasting
- > Daily sales reporting
- > Product KPIs and inventory analytics
- > Secure, role-based access from any device (Excel, web, mobile)

“

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.

Transformation Director  
GWA Group Limited

# What makes Jedox stand out?

Jedox is a planning and performance management software that integrates all the data that matters into a unified platform. Expert at interfacing with systems where data is stored, Jedox eliminates silos and delivers a holistic plan that drives decisive planning. Users quickly grasp how sales operations, workforce plans, and other activities impact the bottom line and make collaborative, real-time adjustments to meet corporate objectives.

## Meaningful business value

- > Achieve quick time-to-value through efficient implementation
- > Plan for any business purpose, any environment, any situation
- > Leverage Excel and other familiar Microsoft applications
- > Drive decisions through practical AI
- > Reduce planning cycles and automate rolling forecasts
- > Cut time spent collecting data from across the organization

“

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.

Finance Manager  
Kvadrat

# Success story: Sanofi

## Unified planning and reporting

Sanofi, a global pharmaceutical leader with sales exceeding €30 billion, needed a unified planning and reporting solution, and implemented Jedox across Europe. The organization first modeled the overarching corporate business intelligence requirements, then adjusted 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 in real time. Now the team can act on real-time insight instead of wasting hours on manual data collection and preparation.

[LEARN MORE](#)

“

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.

Senior Manager of Controlling  
Sanofi

# Success story: Canon

## Integrated large disparate systems in under three weeks

After Canon, world-leading provider of imaging solutions, acquired Océ, a Dutch manufacturer of specialized printers, its Finance department needed to integrate its budgeting and forecasting process. The problem was that the formats differed significantly in terms of detail and reporting requirements. In just three weeks, Canon used Jedox to implement a revenue, margin, and expense model. Three weeks to implement is very fast, considering some of the functional changes that occurred along the way. Today, the web-based application built by the team is used in 15 countries within EMEA and by 30 users throughout Europe.

[LEARN MORE](#)

“

Jedox has made a very strong impression. We had to achieve our goals within very short timeframe and a limited budget. It's great to see how everything came together and I surely recommend financials to include Jedox in their selection process.

Project Director  
Canon Europe

# Six key considerations

Understanding the benefits and capabilities of IBP when evaluating solutions is vital to maximize the long-term value of the investment.

Ultimately, integrating strategic, financial, and operational planning and performance management should lead to more accurate and simplified plans, forecasts, and performance tracking. Different teams should have the ability to create their own reports and analysis functions or combine data in virtually any way that makes sense for them – seamlessly and autonomously. Ask the following six questions to determine the best solution:

## #1

**Does the solution provide unified, collaborative, cross-organizational planning?**

## #2

**Does it offer enough adaptability and scalability to grow with the organization?**

## #3

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

## #4

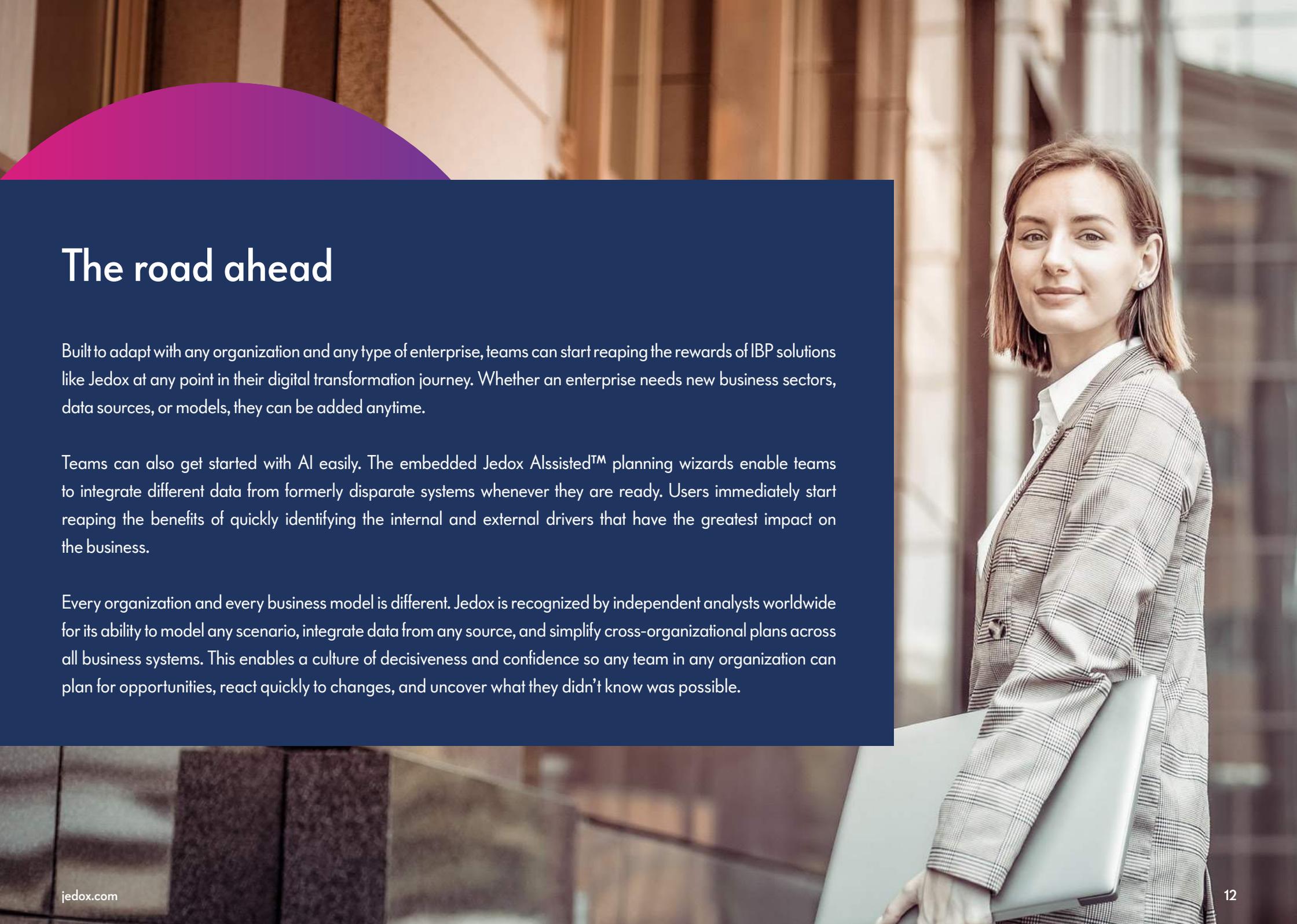
**Does it offer seamless integration with all data sources?**

## #5

**Are modern capabilities, such as AI and machine learning (ML), available?**

## #6

**Does the integrated AI enable teams to tie financial and operational results together to provide detailed, nuanced insights?**



# The road ahead

Built to adapt with any organization and any type of enterprise, teams can start reaping the rewards of IBP solutions like Jedox at any point in their digital transformation journey. Whether an enterprise needs new business sectors, data sources, or models, they can be added anytime.

Teams can also get started with AI easily. The embedded Jedox Assisted™ planning wizards enable teams to integrate different data from formerly disparate systems whenever they are ready. Users immediately start reaping the benefits of quickly identifying the internal and external drivers that have the greatest impact on the business.

Every organization and every business model is different. Jedox is recognized by independent analysts worldwide for its ability to model any scenario, integrate data from any source, and simplify cross-organizational plans across all business systems. This enables a culture of decisiveness and confidence so any team in any organization can plan for opportunities, react quickly to changes, and uncover what they didn't know was possible.

# Related Content



## Planning for growth: What reality and research say about achieving scalability, predictability, and transparency in the sales organization

→ [Download the report](#)

### Read this guide to learn:

- > Twelve trends that cultivate a more adaptable and integrated sales organization
- > Key data points from the Dresner Advisory Services 2022 Sales Performance Management Market Study
- > 15 key questions sales leaders can ask themselves to achieve scalability, predictability, and transparency



## Reconciling finance with HR

→ [Watch the recording](#)

### Watch this on-demand webinar to learn:

- > How to ensure that resources are available to retain talent and minimize attrition
- > The negative effects of missing data
- > Why consistent workforce planning is particularly important in times of economic uncertainty

Jedox simplifies planning, analysis, and reporting with one unified and cloud-based software suite. Jedox empowers decision makers and business users across all departments and helps them work smarter, streamline business collaboration, and make insight-based decisions with confidence.

Over 2,500 organizations in 140 countries use Jedox for real-time planning on the web, in the cloud, and on any device. Jedox is a leading Enterprise Planning and Corporate Performance Management solution provider with offices on four continents and with over 250 certified business partners. Independent analysts recognize Jedox for its leading enterprise planning solutions.



**Germany**  
**Jedox GmbH** (Headquarters)

Bismarckallee 11  
79098 Freiburg im Breisgau  
Phone: +49 761151 47 0

**USA**  
**Jedox Inc.**

120 Causeway St.  
Boston, MA 02114  
Phone: +1 857 847 4004

**France**  
**Jedox France SAS**

5, rue Jean Mermoz  
75008 Paris  
Phone: +33 1 47 23 00 22

**UK**  
**Jedox Ltd.**

Broadgate Tower, 3rd Floor  
20 Primrose Street  
London EC2A 2RS  
Phone: +44 1268 203 888

**Singapore**  
**Jedox Pte. Ltd.**

7 Temasek Boulevard  
#12-01, Suntec Tower 1  
Singapore 038986  
Phone: +65 6803 8632



[www.jedox.com](http://www.jedox.com)  
[info@jedox.com](mailto:info@jedox.com)