The following is intended to outline our general product direction. It is intended for information purposes only, and may not be incorporated into any contract. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions. The development, release, and timing of any features or functionality described for Oracle’s products remains at the sole discretion of Oracle.
Agenda

• Oracle At-a-Glance

• Oracle iGovernment Vision

• Government Performance Management Challenges

• Oracle’s Strategy-to-Success (S2S) Framework

• Oracle’s EPM System
Oracle At-a-Glance

Globally…

#1 in Database
#1 in Supply Chain Mgmt
#1 in Customer Relationship Mgmt
#1 in Human Capital Mgmt
#1 in Performance Management
#1 in Industries
  - Retail
  - Communications
  - Public Sector
  - Professional Services
  - Financial Services

Founded in 1977. Headquarters in Redwood Shores, CA with operations in 145 countries.

- $22.4 billion in FY2008
- 320,000 total customers
- 220,000 database customers
- 37,500 applications customers
- 53,500 middleware customers
- 19,500 partners
- 74,000 employees
- 14,000 developers
- 7,500 support staff
Oracle iGovernment Vision
Where We Are Today
eGovernment Issues

- Lots of Different Technologies
- Loss of Vendor Support
- Training Availability
- Expensive
- Backend Systems Not Designed for the Internet
- Legacy Systems are Inflexible and Difficult to Change
- Citizens Demand 24/7 Government
- Unique Systems for Every Program
- No Effective Governance Model
From eGovernment to...

Oracle iGovernment

- Modernize the IT Infrastructure
- Increase Efficiency and Transparency
- Transform Government Service Delivery
Modernize the IT Infrastructure

- Support Open Standards
- Transition to Grid Computing and Virtualization
- Migrate to a Service Oriented Architecture
- Ensure Security and Controlled Access

Oracle iGovernment

Transform Government Service Delivery

Increase Efficiency and Transparency

Modernize the IT Infrastructure
Increase Efficiency and Transparency

- Deliver Shared Services
- Streamline Business Processes
  - Planning and Budgeting
  - Tax and Revenue
  - Financial Management
  - Human Capital Management
  - Procurement
  - Project and Grant Management
- Ensure the Integrity of Operations

Oracle iGovernment
Transform Government Service Delivery

- Provide a Common Service Delivery Platform
  - CRM (client centric)
  - Case Management
  - Portals and Content
  - Automated Workflow and Assignment
  - GIS
  - Mobile Computing
  - Rules Engine
  - Manage Master Data
  - Enable Self-Service
  - Embed Business Intelligence and Analytics
Oracle’s Application Strategy
Offers Unprecedented Value

✓ **Deliver COMPLETE, Best-in-Class Industry Solutions**
  Industry solutions, not just administrative processes, that positively influence market competitiveness

✓ **On an OPEN Standards-Based Architecture**
  Lowers risk through a broader choice of solutions and connectivity within and across the enterprise

✓ **INTEGRATED for High-Value and Flexibility**
  Out-of-box integration of processes, user experience and intelligence to reduce cost of deployment and provide flexibility to change
Oracle’s Application Strategy

**Complete**
- Comprehensive Industry Portfolio

**Open**
- Standards-Based Architecture

**Integrated**
- Designed to Work Together

- More Value
- Less Complexity
- More Choice
- Less Risk
- More Flexibility
- Less Cost
Oracle iGovernment

- Transform Government Service Delivery
- Increase Efficiency and Transparency
- Modernize the IT Infrastructure

Innovative
Integrated
Intelligent
Government Performance Management Challenges
The National and Local Government Value Chain:
Prioritize Needs and Deliver Services for the Public Good
National and Local Government Drivers

**Fiscal Management**
- How can we maximize revenue collections without increasing taxes?
- What work processes can be automated to reduce costs?

**Increasing Accountability**
- How can I improve tracking and reporting of public funds?
- What is the best way to enforce proper approval and document key decisions / awards?

**Citizen Centricity**
- What is the best way to improve responsiveness to citizen demands?
- How should cases be distributed to improve workload and consistency of outcomes?

**Data Security and Access**
- How can I automate collaboration and still protect sensitive data?
- What is the best way to provide controlled, remote access to centrally managed information?
Global Financial Crisis

Crisis headlines

- **Downturn in the stock markets** – DJ fell below 1997 levels
- Significant **value destruction** – market caps declined by > $10 trn. first 2 weeks of October
- **6 of 30 largest banks disappeared** nationalized – RBS, Fortis, Dexia, HBOS, Wachovia, Lloyds TSB
- **3 of 5 top investment banks disappeared**, remaining two now normal banks
- **Capital markets dried up**, esp. inter-bank lending
- Issuance of **ABS** fell by 75% in H2 '07 and stopped in '08, plain debt down by 75% in '08
- **Deposit guarantee schemes tested**
- **Bail-out packages of $700bn in the US** and approximately **$2,550bn in Europe** passed
- **Public insolvency possible/likely in Iceland, Hungary**
- Several countries in recession

**Trust completely shaken** – not yet back despite government intervention

Source: Eurostat; IMF; Handelsblatt; Financial Times; Worldscope; A.T. Kearney analysis
Oracle’s **Strategy-to-Success** Framework
ERP Has Leveled the Playing Field Creating Operational Efficiencies

Based on Michael E. Porter’s Value Chain
Operational Excellence – the Oracle example

- **1999**: Oracle launches a program with the goal of saving $1Billion through operational improvements leveraging its Technology and Applications.

- **2001**: The first $1B is saved. Operational Processes standardised in one global process, 40 Data Centers consolidated into two; 65 financial sources consolidated into one.

- **by 2004** Oracle had a global Enterprise Resource Planning (ERP) and Customer Relationship Management (CRM) single instance.
Management Systems Complement Operational Systems

How You Run Your Agency Leads to Operational Excellence

IT OWNERSHIP

How you Manage Your Agency Leads to Management Excellence

BUSINESS OWNERSHIP
Definitions

**Operational Excellence**

a business strategy that aims at business processes efficiency through reducing **cost** of business processes, improving **quality** of services and increasing **speed** of operations.

**Management Excellence**

expands on this strategy by focusing on business processes effectiveness through driving and detecting changes (**smart**), following up on those changes (**agile**) and sharing the lessons learned throughout the complete value chain (**aligned**).
Oracle’s EPM Vision: Extend Operational Excellence to Management Excellence

- **Cost** – Lean and Mean
- **Quality** – Six Sigma, TQM
- **Speed** – Real-time, JIT

**Smart** – Deep Insight
**Agile** – Decisive Action
**Aligned** – Across the extended enterprise

Operational Excellence

Management Excellence

Efficiency & Effectiveness

Time
Today’s Reality: Management Processes Are Fragmented

- Lack of business alignment
- Low predictability in performance
- Inconsistency in business decisions

Is this the best way to deal with uncertain times?
Expand The Scope Of Agency Performance Management

[CITIZEN-CENTRIC PERFORMANCE MANAGEMENT]

[TRADITIONAL PERFORMANCE MANAGEMENT]
Deliver Management Excellence With Citizen-Centric Performance Management

Citizen-Centric Performance Management

Traditional Performance Management

SMART

AGILE

ALIGNED
Management Excellence for Business and IT

**Business Requirements**

- Detect And Drive Changes
- Prepare For And Follow Up On Changes
- Share Insight Across Extended Enterprise

**IT Call to Action**

- Rationalize Your Analytical Tools and Management Systems
- Integrate Management Systems With Operational Systems
- Enable Pervasive Access To Management Systems

**Key Words**

- Smart
- Agile
- Aligned

*Oracle*
Oracle’s Strategy-to-Success Management Framework

- Map your own management processes
- Extend the impact of EPM
- Build your business case
Strategy to Success: Oracle’s Framework for Achieving Management Excellence

Citizen-Centric Performance Management

- SMART
  - Stakeholder Environment
    - Gain to Sustain
  - Policies
    - Investigate to Invest
  - Programs
    - Design to Decide
  - Agency Budget
    - Plan to Act
  - Agency Operation
    - Analyze to Adjust
  - Results
    - Record to Report

Traditional Performance Management

- AGILE
- ALIGNED
Stakeholder Environment

- Identify contributions/requirements
- Bridge conflicting requirements
- Align strategy with stakeholders
- Maximize stakeholder value
- Continuous stakeholder dialogue
Semantic intelligence for eDemocracy

Sentiment evaluation and reporting

- Sentiment evaluation
- Dashboards for an advanced analysis of the feedbacks
- Reporting on questionnaires
- Graphic representation
- Drill-down on correlations
- Filters by source, date, etc.
- Investigate dynamics
- Assess potential
- Match potential with resources/assets/goals
- Define position
- Size investments and divestments
**Utility: Invest in Long-Term Capital Intensive Project**

$21 billion US Energy Company – Fortune 125

### Before
- Wants to build a plant that will cost ~$2 billion
- Leveraged with over $4 billion in long-term debt
- Excel models based on a 5-yr budget done on a non-Oracle planning product

### After
- Determine funding requirements for building the plant
- Manage the project funding requirements in conjunction with actual expenditures
- Manage debt-to-capital requirements systematically
• Assess scenarios for alternative future outcomes
• Create strategies for addressing these alternative futures
• Assess risks
• Set aspirational goals
• Decide on programs
University of Vermont Models New Views of Economic Picture

- Combines faculty-student ratio of small liberal arts college with resources of major research university
- 10,000 students, 1200 full & part time faculty
- Operating budget $400 Million

**Needs**
- Adhere to internal debt policy in terms of how much debt service can be supported out of the budget
- Create financial structure to support more detailed analysis and modeling capabilities

**After**
- Test permutations of enrollment strategy such as out-of-state vs in-state students, class number, retention data
- Overall view of balance sheet based on enrollment, research programs, inflators, cost of capital
- Integrate data with overall strategic plans
Agency Budget

- Agree on planning framework
- Align across organisation levels/functions
- Commit to plans
- Allocate resources
- Rolling forecast
### Before
- 8 weeks for first budget iteration
- 10 days to transfer employees
- 4 weeks to create and distribute Excel templates
- Data was not dependable
- Corporate budget group had 9 FTE’s to maintain the process

### After
- 4 ½ weeks for first budget iteration
- Reorganizations down to 24 hours
- Detailed budget to 700 accounts
- Phase 2 budgeted to 60,000 people
- First multidimensional reporting
- Interactive variance analysis
Agency Operation

- Monitor variances continuously (execution vs plan)
- Perform root-cause analysis
- Benchmark performance
- Identify improvement opportunities
- Adjust forecasts and redeploy resources
Improving Strategic Planning at Telenor

**BEFORE**
- 6 different analysis/reporting tools
- 4-6 financial data warehouse solutions
- No common tool for budgeting
- Dependency on external consultants
- Many information silos, no analysis across the companies
- Many user interfaces to work with – processes across many systems

**AFTER**
- Manage strategy and initiatives on a regular basis
  - Agenda for the monthly management meeting is determined by the status indicators on the strategic objectives
  - Strategic objectives tie into measures and initiatives
- Cost-cutting through process, system, and information standardization

Ranked as the world’s seventh largest mobile operator
- More than 150 million mobile subscribers worldwide
- Listed as No.1 on Dow Jones Sustainability Index 2008
- Revenues 2007: 18 billion USD
- Workforce 2007: 35 800 man-years
Agency Results

- Combine financial and operational information
- Deliver timely, actionable insights to all stakeholders
- Include economic, environmental and social impact
- Meet regulatory reporting requirements
Improving Transparency & Customer Service

New York is the largest city in the USA with a population of over 8.2 million within an area of 322 square miles. The city’s Department of IT unveiled a performance management system, Citywide Performance Reporting (CPR), in 2008.

Before

- Unable to provide timely reports on agency performance
- Unable to show areas of improvement
- Inconsistent internal views of operational performance
- Time spent collecting and aligning data rather than analyzing and problem solving

After

- 2500 KPI’s across City agency operations
- Single point of access and single version of truth for all users
- Standardized reporting format across 40 agencies and all data types
- Simplified monitoring of 500 critical outcome measures
- Sources data from Siebel Field Service (NYC311) and legacy agency systems

“CPR provides anyone – government officials, reporters and most importantly everyday New Yorkers, with a wealth of regularly updated information on city government….CPR will let us use City data to indentify problems and improve service delivery.” – Michael Bloomberg, Mayor, City of New York
Excellence in Stakeholder Reporting
Service Analytics and Oracle BI Suite EE Plus

Citywide Performance Report

<table>
<thead>
<tr>
<th>Citywide Theme</th>
<th>Number of Indicators</th>
<th>% Improving or Stable</th>
<th>% Declining</th>
</tr>
</thead>
<tbody>
<tr>
<td>Citywide Administration</td>
<td>55</td>
<td>76.4%</td>
<td>23.6%</td>
</tr>
<tr>
<td>Community Services</td>
<td>116</td>
<td>74.1%</td>
<td>25.9%</td>
</tr>
<tr>
<td>Economic Development and Business Affairs</td>
<td>54</td>
<td>68.5%</td>
<td>31.5%</td>
</tr>
<tr>
<td>Education</td>
<td>48</td>
<td>95.8%</td>
<td>4.2%</td>
</tr>
<tr>
<td>Infrastructure</td>
<td>85</td>
<td>72.9%</td>
<td>27.1%</td>
</tr>
<tr>
<td>Legal Affairs</td>
<td>27</td>
<td>74.1%</td>
<td>25.9%</td>
</tr>
<tr>
<td>Public Safety</td>
<td>66</td>
<td>77.3%</td>
<td>22.7%</td>
</tr>
<tr>
<td>Social Services</td>
<td>122</td>
<td>74.6%</td>
<td>25.4%</td>
</tr>
</tbody>
</table>

“[Citywide Performance Reporting] provides anyone – government officials, reporters and most importantly everyday New Yorkers, with a wealth of regularly updated information on city government….CPR will let us use City data to identify problems and improve service delivery."

Michael Bloomberg, Mayor, City of New York
Enhanced Strategic Planning with Global Visibility
Fonterra Instates Single Version of Truth for all Users

- Responsible for more than one third of international dairy trade
- Employees: 17,000
- Revenue: US$9.9 Billion

<table>
<thead>
<tr>
<th>Needs</th>
<th>After</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Eliminate the need to e-mail financial consolidation files</td>
<td>• Increased the flexibility of budgeting and forecasting</td>
</tr>
<tr>
<td>• Establish a global chart of accounts</td>
<td>• Single global instance of financial data, improved data integrity</td>
</tr>
<tr>
<td>• Increase visibility into financial data</td>
<td>• Financial results saved centrally</td>
</tr>
<tr>
<td></td>
<td>• Shortened month-end closing process by two to three days</td>
</tr>
<tr>
<td></td>
<td>• Reduced intercompany reporting time from 30 minutes to five minutes</td>
</tr>
</tbody>
</table>
Scenario 1: Introducing a new Service

GAIN TO SUSTAIN
- Identify contributions requirements
- Bridge conflicting requirements
- Align strategy with stakeholders
- Maximize stakeholder value
- Continuous stakeholder dialogue

INVESTIGATE TO INVEST
- Investigate dynamics
- Assess potential
- Match with resources, assets, goals
- Define position
- Invest/divest

DESIGN TO DECIDE
- Create scenarios
- Create strategies
- Risk assessment
- Set aspirational goals
- Decide on programs

PLAN TO ACT
- Agree on planning framework
- Cross-Dept alignment
- Commit
- Allocate resources
- Continuous experiments

ANALYZE TO ADJUST
- Continuously monitor variances
- Perform root-cause analysis
- Benchmark performance
- Identify improvement opportunities
- Reforecast

RECORD TO REPORT
- Extract data
- Transform data
- Determine presentation
- Share
- Moderate dialogue
Introducing a new Service

1. Create strategy and assess risk
   Set ambitious goals

2. Assess Potential Needs
   Match with resources

3. Invest

4. Align, commit and allocate resources

5. Reforecast, monitor variances

6. Report results
Scenario 2: Operational Process Disruption

1. Continuously monitor variances
   - Extract data
   - Perform root-cause analysis
   - Benchmark performance
   - Identify improvement opportunities

2. Create scenarios
   - Investigate dynamics
   - Agreed on planning framework
   - Cross-Dept alignment
   - Risk assessment

   - Create strategies
   - Match with resources, assets, goals
   - Define position
   - Set aspirational goals

   - Align strategy with stakeholders
   - Maximize stakeholder value
   - Continuous stakeholder dialogue

   - Identify contributions requirements
   - Bridge conflicting requirements
   - Commit
   - Allocate resources
   - Decide on programs
   - Invest/ divest

   - SOLVE

   - Reforecast
   - Moderate dialogue
   - Share

   - Continuous experiments
   - Continuously monitor variances
   - Perform root-cause analysis
   - Benchmark performance
   - Identify improvement opportunities
Operational Process Disruption

1. Monitor variance, root-cause analysis
2. Communicate
3. Allocate resources, SOLVE!
4. Benchmark performance and identify improvement activities
5. Update scenarios
6. Report results of incident

Immediate action

Debrief
Other Examples

• Introducing E-Government
• Improving the green strategy
• Outsourcing IT
• Upgrading IT system
• New compliance regulations
• Introducing Web 2.0 customer interaction
• Planning for the new year
Oracle’s Enterprise Performance Management System
Oracle’s Enterprise Performance Management System

EPM Workspace

Performance Management Applications

BI Applications

Business Intelligence Foundation

Fusion Middleware

OLTP & ODS Systems

Data Warehouse Data Mart

OLAP

SAP, Oracle, Siebel, PeopleSoft, Custom

Excel XML

Business Process

Oracle
Pervasive Information Access Through Common Delivery Layer

EPM WORKSPACE

<table>
<thead>
<tr>
<th>Desktop</th>
<th>Web</th>
<th>Search</th>
<th>Office</th>
<th>Alerts</th>
<th>Mobile</th>
</tr>
</thead>
</table>

Performance Management Applications

BI Applications

Business Intelligence Foundation

Fusion Middleware

OLTP & ODS Systems

Data Warehouse

Data Mart

OLAP

SAP, Oracle, Siebel, PeopleSoft, Custom

Excel XML

Business Process
One Window, not Multiple
Oracle EPM Workspace

- Self-service Personalization
- Contextual navigation
- OBIEE and BI Publisher integration
- WebCenter integration
- Spans all solutions in the Oracle EPM System
Unified Microsoft Office Interface
Smart View for Office

- Adhoc Reporting
- Stylized Output:
  - Formats
  - Tables
  - Charts
  - Formulae
- Data Entry and Apps Processing
- Word and PPT
- Now works with OBIEE as source
Unified Desktop Gadgets
Oracle Smart Space

- New OBIEE and BI Publisher Integration
- Hyperion Reporting and Analysis Support
- Enhanced Client UI and Collaborator
- New Gadgets
  - Essbase Calculation
  - Essbase Dataload
  - Global Gadgets
- Pluggable Services Architecture
Highly Scalable BI Foundation
Providing Insights Across the Enterprise

EPM Workspace

Performance Management Applications

BI Applications

BUSINESS INTELLIGENCE FOUNDATION

Common Enterprise Information Model

Essbase

BI Server

Predictive Analytics

Fusion Middleware

OLTP & ODS Systems

Data Warehouse Data Mart

OLAP

SAP, Oracle, Siebel, PeopleSoft, Custom

Excel XML

Business Process

Oracle
Mission Critical Scalability and Performance

Oracle BI Foundation

- Business views for end-users
- Consistent business measures and calculations
- Advanced calculation engine
- Optimized data distribution
# Powerful Business Analytics

**Oracle Essbase**

| Richest Business User Experience | Superior Tools for the Business User  
|                                 | Broadest Analytic Functionality  
|                                 | “Speed of Thought” Response |

| Most Highly Advanced Calculation Engine | Superior Calculation Power  
|                                       | Comprehensive Library of Functions  
|                                       | Extensive Financial and Time Intelligence |

| Best Custom Analytic Environment | Optimized Storage  
|                                 | Enterprise scale Forward Looking Applications  
|                                 | Premium Performance |
RTD Extends the BI Foundation
Driving Adaptive Business Processes

Closes the gap between process analysis and process improvement
- Embeds decisions within the business process
- Optimizes across competing business priorities
- Uses feedback to self-adapt
- Creates new process insights

Uses real time context to increase value
- Links historical with real-time information
- Combines rules and predictive models
- Self-learns to automate prediction

Provides an enterprise platform
- Integrates into multiple operational applications and interaction channels
Market-Leading Packaged Applications
Financial and Operational

EPM Workspace

Performance Management Applications

Business Intelligence Foundation

Fusion Middleware

BI APPLICATIONS
- Sales
- Contact Center
- Procurement & Spend
- Finance
- Service
- Marketing
- Supply Chain & Order Mgmt
- HR

OLTP & ODS Systems
Data Warehouse Data Mart
OLAP
SAP, Oracle, Siebel, PeopleSoft, Custom
Excel XML
Business Process
Single View of Enterprise Information
Oracle BI Applications

- Dashboards
Single View of Enterprise Information
Oracle BI Applications

- Dashboards
- Pre-built integration
- Pre-built metadata mapping
- Pre-built metrics
- Pre-built data model
- Heterogeneous data sources

## Oracle BI Applications

**Complete, Pre-built, Best Practice Analytics**

<table>
<thead>
<tr>
<th>Sales</th>
<th>Service &amp; Contact Center</th>
<th>Marketing</th>
<th>Procurement &amp; Spend</th>
<th>Supply Chain &amp; Order Management</th>
<th>Financials</th>
<th>Human Resources</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pipeline Analysis</td>
<td>Service Effectiveness</td>
<td>Campaign Effectiveness</td>
<td>Direct / Indirect Spend</td>
<td>Revenue and Backlog</td>
<td>General Ledger</td>
<td>Employee Productivity</td>
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<tr>
<td>Forecast Accuracy</td>
<td>Customer Satisfaction</td>
<td>Customer Insight</td>
<td>Buyer Productivity</td>
<td>Inventory</td>
<td>Accounts Receivable</td>
<td>Compensation</td>
</tr>
<tr>
<td>Sales Team Effectiveness</td>
<td>Resolution Rates</td>
<td>Product Propensity</td>
<td>Off Contract Purchases</td>
<td>Fulfillment Status</td>
<td>Accounts Payable</td>
<td>Compliance Reporting</td>
</tr>
<tr>
<td>Up-sell/ Cross-sell</td>
<td>Service Rep Efficiency</td>
<td>Loyalty &amp; Attrition</td>
<td>Supplier Performance</td>
<td>Customer Status</td>
<td>Cash Flow</td>
<td>Workforce Profile</td>
</tr>
<tr>
<td>Cycle Times</td>
<td>Service Cost</td>
<td>Market Basket Analysis</td>
<td>Purchase Cycle Time</td>
<td>Order Cycle Time</td>
<td>Profitability</td>
<td>Retention Analysis</td>
</tr>
<tr>
<td>Lead Conversion</td>
<td>Churn &amp; Service Trends</td>
<td>Campaign ROI</td>
<td>Employee Expenses</td>
<td>BOM Analysis</td>
<td>Expense Management</td>
<td>Return on Human Capital</td>
</tr>
</tbody>
</table>

Source adapters: Oracle, PeopleSoft, Siebel, JD Edwards, and Other Operational & Analytic Sources

**Oracle BI Suite Enterprise Edition Plus**
Build from Scratch with Traditional BI Tools

Oracle BI Applications

- Prebuilt Business Adapters for Oracle, PeopleSoft, Siebel, SAP, others
- Prebuilt DW design, adapts to your EDW
- Role-based dashboards and thousands of pre-defined metrics
- Easy to use, easy to adapt
- Faster deployment
- Lower TCO
- Assured business value

Training / Roll-out

DW Design

Back-end ETL and Mapping

Weeks or Months

Source: Patricia Seybold Research, Merrill Lynch, Oracle Analysis
Market-Leading Packaged Applications
Financial and Operational

EPM Workspace

PERFORMANCE MANAGEMENT APPLICATIONS

<table>
<thead>
<tr>
<th>Strategy Management</th>
<th>Business Planning</th>
<th>Profitability Management</th>
<th>Financial Reporting &amp; Compliance</th>
</tr>
</thead>
</table>

BI Applications

Business Intelligence Foundation

Fusion Middleware

OLTP & ODS Systems
Data Warehouse Data Mart
OLAP
SAP, Oracle, Siebel, PeopleSoft, Custom
Excel XML
Business Process

Oracle
Market-leading Performance Management Applications Suite

Strategic Planning
- Set Strategic Objectives
- Long-Term Planning
- Corporate Development
- Treasury Strategies

Planning and Budgeting
- Cascade Targets
- Forecasting
- Allocate Resources
- Detailed Budgeting

Master Data
- Business Rules
- Metrics/KPIs
- Targets, Plans & Actuals

Financial Close Process
- Data Cleansing
- Consolidate
- Internal Reporting & Analysis
- External Reporting & Compliance

Cost and Profitability Management
- Define Costing Methods
- Report & Analyze
- Define Cost Drivers
- Perform Allocations

ORACLE
Performance Management Applications
Integrated Suite of Market Leading Best-of-Breed Modules

Strategy Management
- Clearly articulate strategy & goals, communicate them across the agency
- Develop scorecards leveraging recognized methodologies

Integrated Agency Planning
- Ensure accurate forecasts, shorten budgeting & planning cycles, and model the potential impact of workforce & capital spending decisions

Cost Management
- Conduct cost analysis using robust modeling and analysis with integrated drill down
- Visibility into cost and revenue drivers through traceability maps

Financial Reporting & Compliance
- Close and report financial results, meet regulatory requirements, reduce compliance costs and improve confidence in the numbers

Strategic Finance
Performance Scorecard
Planning and Workforce Planning
Capital Expense Planning
Strategic Finance
Profitability and Cost Management
Financial Management
Financial Data Quality Management
User-Driven Enhancements to Market Leading Applications

• Hyperion Financial Management
  • New Equity Pickup Module
  • Enhanced Intercompany Processing
  • BI Publisher Integration for System Reporting
  • Oracle Data Integrator Support
  • Drill-Through to Oracle EBS

• Hyperion Planning
  • Ad-hoc Analysis in Smart View
  • Document Attachments
  • Oracle Data Integrator Support
  • Drill-Through to Oracle EBS

• Hyperion Strategic Finance (CY2008)
  • Support for Financial Data Quality Mgmt
  • Automated Export to Essbase
  • Integration with Oracle Crystal Ball
Leveraging Fusion Middleware to Lower TCO
Oracle Fusion Middleware

- User Interaction
- Enterprise Performance Management
- Business Intelligence
- Content Management
- SOA & Process Management
- Application Server
- Grid Infrastructure
- Enterprise Management
- Identity Management

Development Tools
Leveraging Common Master Data Across the Enterprise
Data Integration

**NEED…**
Information How and Where you Want It

- Business Intelligence
- Corporate Performance Management
- Business Process Management
- Business Activity Monitoring

**Data Integration**

- Migration
- Data Warehousing
- Master Data Management
- Data Synchronization
- Federation
- SOA (Messaging)

**HAVE…**
Data in Disparate Sources

- Legacy
- ERP
- CRM
- Best-of-breed Applications

**HAVE…**
Information How and Where you Want It

- Business Intelligence
- Corporate Performance Management
- Business Process Management
- Business Activity Monitoring

**Data Integration**

- Migration
- Data Warehousing
- Master Data Management
- Data Synchronization
- Federation
- SOA (Messaging)
## Oracle’s Enterprise Performance Management System

**Providing Insights Across the Enterprise**

### EPM WORKSPACE

- Desktop
- Web
- Search
- Office
- Alerts
- Mobile

### PERFORMANCE MANAGEMENT APPLICATIONS

- Strategy Management
- Business Planning
- Profitability Management
- Financial Reporting & Compliance

### BI APPLICATIONS

- Sales
- Contact Center
- Procurement & Spend
- Finance
- Service
- Marketing
- Supply Chain & Order Mgmt
- HR

### BUSINESS INTELLIGENCE FOUNDATION

- Essbase
- Common Enterprise Information Model
- BI Server
- Predictive Analytics

### FUSION MIDDLEWARE

- SOA
- Data Quality
- Data Integration
- MDM
- Identity Management
- Content Management
- Business Process Management

- OLTP & ODS Systems
- Data Warehouse Data Mart
- OLAP
- SAP, Oracle, Siebel, PeopleSoft, Custom
- Excel XML
- Business Process
Oracle EPM System
Driving Management Excellence

SMART:
Market-Leading Products and Technology
- Address enterprise-wide requirements with scalable BI foundation and powerful BI tools
- Use and extend best practice applications for financial and operational analytics
- Gain new insights through advanced visualization and predictive analytics

AGILE:
Advanced Integration Improves Agility and Lowers TCO
- Simplify deployments with common user interface and application foundation
- Improve operational performance by linking analytics to transactional systems
- Leverage existing IT investments through Fusion Middleware and Service Oriented Architecture (SOA)

ALIGNED:
Pervasive Intelligence Across the Enterprise
- Support strategic, financial and operational management processes
- Strategically allocate resources with new Profitability & Cost Management application
- Leverage common master data across analytical and operational systems
Oracle EPM System
Complete, Open & Integrated

Stakeholder Environment  Policies  Programs  Agency Budget  Agency Operation  Results

EXTERNAL REPORTING

STRATEGIC & PREDICTIVE MODELING

INTEGRATED BUSINESS PLANNING

PROFITABILITY & COST MANAGEMENT

SCORECARDING, MONITORING & ANALYSIS

FINANCIAL & MGMT REPORTING

BI TOOLS & BI APPLICATIONS, REAL-TIME MONITORING

OLAP, DATA WAREHOUSE, DATA MINING

DATA INTEGRATION, APPLICATION MANAGEMENT & MASTER DATA MANAGEMENT

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Oracle’s Leadership in Enterprise Performance Management
Leader in Key Markets

- Enterprise Performance Management
- Business Analytics
- Database
- Database Share on Linux
- Supply Chain Management
- CRM
- Retail
- Communications
- Human Capital Management
- Financial Services
- Public Sector
- Professional Services
Oracle Positioned in Leaders Quadrants

Magic Quadrant for Business Intelligence Platforms, 2009

Magic Quadrant for CPM Suites, 2008

Magic Quadrant for Data Warehouse Database Management Systems, 2008

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Sources:
- Gartner, Inc., "Magic Quadrant for Business Intelligence Platforms, 2009" by James Richardson, Kurt Schlegel, Bill Hostmann, Rita Sallam, 16 January 2009
Take-aways and Next Steps

1. Oracle has a clear strategy, delivering its vision

2. Oracle has proven customer success and deliverable solutions

3. Assess your Management Excellence to decide where to start
Further Reading
http://www.oracle.com/epm

Management Excellence White Papers:
• How Tomorrow’s Leaders Will Get Ahead
Available Now
• The Metrics Reloaded
• From Strategy to Success
• Techniques and Technologies

Profit Online Podcast
• Beyond Competitive Advantage: EPM and Management Excellence

Publications
• Journal of Management Excellence, Issue 1, 2 and 3
Questions & Answers
Thank you!

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