

IBM Apptio Planning Essentials

A streamlined approach to faster, more effective IT financial planning

Overview

IT leaders are working to understand and justify IT costs and investments and communicate the value to the business, which can be a challenge for many organizations. This is especially difficult when budgeting and forecasting in continually changing markets. Creating and adjusting plans to meet the shifting needs of the business while still providing clarity is one of the key challenges businesses are facing. Developing a consistent, repeatable planning and reporting strategy that creates transparency for the business and encourages collaboration is crucial. Similarly, the lack of consolidated data sources results in limited granularity and accountability, as well as manual processes that are both time-consuming and resource-intensive for proper planning.

Key Benefits

- Consolidate Opex and Capex budgets into one dashboard for a holistic IT view
- Lower IT spend and effectively redirect investments to key business priorities
- Reduce planning cycle time by 75% in little as 4 weeks
- Reduce spend-to-plan variance to 1-2%

The Solution: IBM Apptio Planning Essentials

IBM Apptio Planning Essentials provides a streamlined approach and single pane of glass to budgeting and forecasting IT-related expenses. Plan across key areas, including, labor, vendor costs, and asset management, providing a holistic view of your IT expenditures. The solution automates data consolidation and reporting, letting you focus on strategic analysis and decision-making. Its advanced collaboration features ensure seamless alignment between IT and finance teams through real-time communication and coordination. With comprehensive variance analysis and forecasting capabilities, organizations can effectively monitor IT spending, plan future costs, and analyze performance history with accuracy.



Accelerate Budget Planning & Forecasting

Automate tasks and collaborate as a team to create budgets and forecasts faster. Run 'what-if' scenarios in minutes to assess the key drivers that affect your business.

- Create a repeatable, accurate, and collaborative planning process
- Reduce time spent on manual data entry and consolidation while tracking changes with a detailed audit log



Optimize Labor Planning

Align labor resources with business objectives by identifying gaps between budgeted headcount and actuals. Quickly assess the fully burdened cost of labor and adjust plans accordingly.

- Integrate systems to create an effective headcount plan based on accurate, real-time data
- Control what individuals can view, modify, or access helping to protect sensitive financial data



Surface Actionable Insights

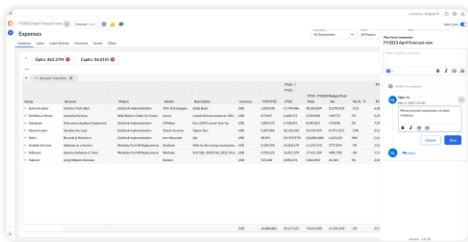
Run variance analysis to understand and address the reasons behind identified gaps, such as budget overspend, unplanned expenses, or project delays.

- Track, manage, and reduce budget variance against plan
- Instantly import actuals from IBM Apptio Costing and create forecast plans

IBM Apptio Planning Essentials

Accelerate Budget Planning & Forecasting

- Streamline approval and coordination processes across teams and increase budget holder accountability and visibility.
- Create plans for key areas such as labor, assets, and contracts.
- Identify, explain, and defend meaningful spend variances for business leaders.
- Reduce time spent on manual data collection with automated data ingestion.
- Consolidate OpEx and CapEx budgets to gain a holistic view of IT spend, improve budget transparency, and increase accountability.
- Review and communicate your IT spend and implement a structured view of expenses based on industry-standard framework to allow for faster as-needed analysis.



Optimize Labor Planning

- Enable regular reforecasting of labor costs with minimal effort, aligning workforce spending with current needs.
- Incorporate resource-based costs, like labor, into overall budget planning with detailed dimensions such as Type, Location, and Role.
- Gain timely insight into planned labor spend, a key component of IT budgets, for more informed decision-making.
- Set and track labor headcount targets alongside financial targets, ensuring alignment with organizational goals.

Surface Actionable Insights

- Track, manage, and reduce budget variance by identifying variance drivers and incorporate actual expenses into budget planning.
- Compare rolling forecasts vs. actuals and identify important differences.
- Identify and shift resources to higher-value activities by connecting actuals to planned IT spend and identifying budget variances.
- Adjust investment strategies quickly and easily, ensuring alignment with IT financial and operational goals.
- Translate costs into IT-relevant categories and identify and manage variances against the plan.



Reduced IT planning cycle time by over 50%, improved decision-making speed, and enhanced reporting accuracy by centralizing budgeting and forecasting processes



Automated and reduced the budgeting process time from 15-30 days to just 2-3 days.

Get Started

Apptio, an IBM company, is the leading technology spend and value management software provider. Apptio's AI-powered data insights empower leaders to make smarter financial and operational decisions across Information Technology (IT), multi-cloud FinOps, and digital product development. Apptio's mission is to deliver business value with every technology investment and team. Powered by Apptio's cloud platform, Apptio's SaaS applications translate technology spend into clear business outcomes and financial ROI. As a pioneer and category leader in Technology Business Management (TBM), FinOps, and Agile Portfolio Management, Apptio works with thousands of customers, partners, and community members worldwide.

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