

IBM Planning Analytics

Get AI-infused, integrated business planning starting at USD 825 per month for 5 users



Highlights

Provides integrated business planning and analysis

Displays intuitive user interfaces

Offers fine-grained data analysis

Delivers built-in AI forecasting

Provides deployment flexibility

Volatility, uncertainty and risk are long-standing challenges that constantly affect organizations. These challenges continue to be driven by inflation, supply chain issues and labor complexities. In this critical environment, how can organizations know the right cost to cut and what profit stream to prioritize?

IBM® Planning Analytics automates integrated business planning across your organization and fosters collaboration across your teams so you can respond to disruption quickly and drive profitable growth.

Break down profitability and perform fine-grained analyses of what-if scenarios. Instantly see the impact of your decisions as financial models and metrics update in real time. Extend planning effortlessly—start small and scale without acquiring new technologies or licenses. Increase engagement with powerful yet friendly interfaces, whether you prefer web or Microsoft Excel. Lower adoption barriers with our generative AI (gen AI) assistant—automate routine tasks, uncover insights and empower users, regardless of skill set, to meaningfully contribute to planning and decision-making.

Provides integrated business planning and analysis

IBM Planning Analytics revolutionizes how organizations approach planning by breaking down the traditional silos between business units. It unifies data from various sources—like ERP, CRM and HRM—into a single governed database, ensuring every team member draws from the same well of information. This framework fosters a culture of transparency and collaboration, creating alignment across the organization. But IBM Planning Analytics doesn't stop at planning—it analyzes data, reveals trends and allows real-time iteration for continuous planning.

With everything from budgets to forecasts housed in one application, consistency is guaranteed. Any change in one area flows seamlessly across all plans, underpinned by centralized business rules when needed.

Organizations can start small, implementing IBM Planning Analytics within a single department, such as finance, to refine the budgeting, forecasting and financial planning processes. This initial step allows a business to experience firsthand the benefits of streamlined, data-driven planning without the need for a full-scale organizational overhaul.

IBM Planning Analytics can adapt to your unique requirements and evolve alongside your business. Whether you are adjusting forecasting models, incorporating new data sources or changing reporting structures, the solution can be tailored to meet your needs.

Displays intuitive user interfaces

IBM Planning Analytics has four components:

- In-memory database (IBM TM1®)
- Intuitive web interface
- Native Excel interface
- Gen AI assistant

The synergy of its components delivers a seamless and user-friendly experience for all skill levels—from technical experts to nonspecialized business professionals.

Table Manager 1 (TM1) is a multidimensional, in-memory online analytical processing (OLAP) database with a cell-oriented structure—like spreadsheets—that allows users to create sophisticated financial models and perform advanced calculations while benefiting from control and governance.

IBM Planning Analytics Workspace (PAW) is a highly visual web interface that allows users to create impactful reports using charts, maps, images and videos, with automated visualizations for sharing insights with decision-makers. Its natural-language feel enhances usability through quick searching and snap commands. Dashboards and scorecards link to plans and budgets, helping business users monitor performance and align actions with corporate objectives. PAW provides a guided planning experience with transparent workflows, enabling users to manage applications for planning, budgeting, forecasting and reporting while facilitating smooth collaboration across multiple stages of the planning process.

IBM Planning Analytics for Excel allows users to work within the familiar Excel interface and keep full Excel functionality, including graphs and built-in functions. Finance and business professionals can avoid complex models' built-in spreadsheets, disparate data sources and lack of governance while enjoying all the capabilities of a modern planning and analytics solution. Hierarchy-aware reports consolidate data across state, country and regional levels, eliminating redundancy and the need for duplicate data across report levels.

Built with IBM watsonx™, IBM® Planning Analytics Assistant is designed to be intuitive and accessible, fostering collaboration across teams. Regardless of role, technical skill or seniority, users can leverage the solution's advanced features through natural language. Imagine simply saying, "Show me last year's revenue for mobile phones," and instantly getting a detailed view. No more time wasted on manual searches. Get detailed explanations of outliers and key drivers in your plans along with a detailed PDF report so that you can communicate findings and make decisions with confidence.

Offers fine-grained data analysis

IBM Planning Analytics, powered by the advanced in-memory TM1 calculation engine, revolutionizes how you analyze multidimensional data, covering both historical and future-oriented data sets. The platform integrates data from multiple sources, enabling comparative analysis across systems. With its high-speed SAP connector, IBM Planning Analytics transfers up to 20,000 records per second and seamlessly connects to systems such as S/4HANA, Business Warehouse and ERP Central Component. Supporting all OData sources, it works across both production and nonproduction environments. This allows for complex dimensional calculations, such as analyzing product profitability, supply chain options, sales mix, and price or volume variances.

With IBM Planning Analytics, handling complex hierarchies and dimensions becomes straightforward, enabling deep insights into your business's performance or identifying areas of concern. It supports large-scale data volumes efficiently thanks to its ability to manage data sparsity in multidimensional planning cubes. This capability means there's less need to move or replicate data, allowing analysts to deliver a "single version of the truth" to management.

Analysts can create what-if scenarios by mixing different business elements into their plans, budgets and forecasts. They can make models that mirror the way their company is organized, its rules and how different parts of the business interact. As these aspects evolve, the models can be updated, too. During the planning process, analysts can identify key business factors and see how changes in one area might affect financial and operational results. This makes it easier to understand trends, predict the effect of various business decisions and give more time to explore different options.

Delivers built-in AI forecasting

IBM Planning Analytics puts the power of AI algorithmic forecasting in the hands of everyday users—even those without data science skills—to enhance the speed and accuracy of your forecasts.

AI forecasting improves accuracy by analyzing historical trends and seasonality, saving time for users. IBM Planning Analytics provides built-in advanced AI forecasting without the hassle of extra purchases, all backed by full IBM support. IBM Watson® time-series algorithms select the best method for predicting values without needing external data export. They provide a detailed explanation of predictions, enhancing transparency and accountability; these include:

- **Baseline forecasting:** Uses historical data to project future outcomes so you get a starting point to execute a scheduled forecast.
- **Univariate forecasting:** Employs time-series AI algorithms to analyze and model forecasting data. It detects seasonality and trends, enhancing forecasts with automatic outlier detection and correction.
- **Multivariate forecasting:** Improves accuracy by analyzing trends and interactions among multiple variables, factoring in their historical and projected values.

Provides deployment flexibility

IBM is the only provider offering unmatched deployment flexibility—on premises and on IBM Cloud®, Amazon Web Services and Microsoft Azure—giving clients the freedom to choose their ideal platform with top-tier security, scalability and performance. This flexibility makes it easy to scale planning and analytics as the business grows or faces changing demands.

For the software as a service model, with faster setup, companies can start using IBM Planning Analytics quickly, without the hassle of complicated on-premises installations. IBM's pay-as-you-go model reduces upfront costs and offers clear, predictable pricing with no hidden fees. Organizations gain better control over their spending while getting all the tools they need—scalable analytics, AI and more—securing flexibility without sacrificing value.

Why IBM

IBM is a leading innovator in planning, analysis and reporting solutions, supporting thousands of clients globally. Renowned analyst firms, including Forrester,¹ Gartner² and BARC,³ consistently recognize IBM as a leading provider, underscoring its industry expertise and cutting-edge technology. This combination empowers businesses with insights that guide strategic decisions and foster growth.

Learn more at ibm.com/products/planning-analytics, or contact your IBM representative or IBM Business Partner.

1. Digital Operations Planning and Analytics, Q4 2023, Forrester, 6 December 2023.
2. Market Guide for Cloud Extended Planning and Analysis Solutions, Gartner, January 2024.
3. Integrated Planning and Data Analytics Score, 2023, BARC, March 2023.

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