



# Finance Transformation Executive Roundtable

# Agile Finance Organizations

Scott Layton

Senior Partner, Vice President

Global Finance Transformation Practice

IBM



“A finance organization that uses agile practices is not the same as an Agile Finance Organization.”

# IBM has been continuously transforming its Global Business Services towards an intelligent engine of growth and re-invention

The Discrete Shared Services

1999

- Consolidate transaction processing
- Discrete business unit service centers

The Globally Integrated Enterprise

2000

- Scale efficiencies
- Vertical process standardization
- Alternative labor models
- Connected delivery model

Act 1  
2015

The Agile Enterprise

2016

- Digitized, cloud-based technology
- Workflow optimization, Agile
- Horizontal process standardization
- Service excellence culture, NPS
- IBM Data Lake and NextGen applications
- Innovation data / analytics

2020

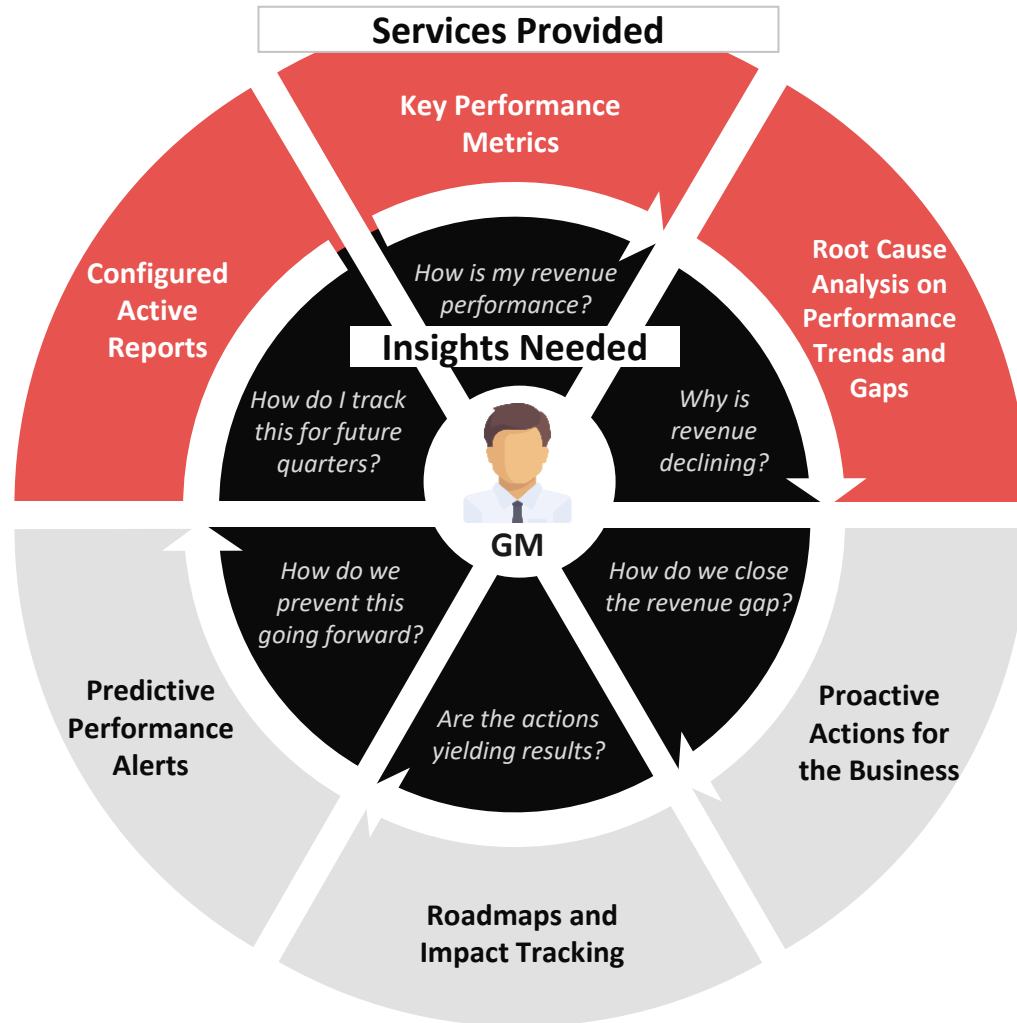
The Intelligent Enterprise

2021

- Data curated to support AI
- Intelligent workflows
- Robotic process automation (RPA)
- Exponential technologies
- Agility across organizational boundaries
- Personalized learning for every employee
- Technology adoption becomes pervasive

Act 2

# At IBM, we reimagined our finance and planning function into two organizations that support and complement each other



## Performance Insights (R2A Workflow)

- Deliver **holistic business view** of performance
- Configure **active reports** to address unique business needs
- Perform proactive **root cause analysis and predictive**

R2A outcomes enable A2R workflow to focus on proactive business actions

## Business Outcomes (A2R Workflow)

- Develop proactive actions to **close performance gaps**
- Partner with the business to **drive actions** and track impact
- Engage with PI and Data Science teams to develop predictive **analytics**

 *Enabled by Data Science & Technology through predictive & prescriptive capabilities*

# Agile for IBM: a journey with constant adaptation and new strategies to deal with unanticipated roadblocks with many lessons learned



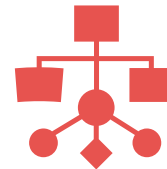
Going all in on enablement structure



Operating Model built on change management



Leadership selection & development

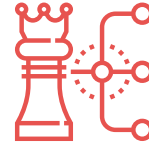


Success starts with the workflow

# The Metrics have Changed



Employee Happiness  
measured weekly



Time Spent on  
Strategic Work



Department Agile  
Maturity



Engagement and job  
satisfaction measured  
monthly



Time Spent doing  
Journal Entries



Data Science Assets  
Use by Process

**Engagement +  
Happiness**

**Value +  
Complexity**

**Agile + Data  
Maturity**



# Finance Transformation Executive Roundtable

Thank you