

The background of the page is a textured, light beige color. It features several abstract, stylized illustrations of hands in various colors (red, orange, blue, brown) and patterns (stripes, solid colors). The hands are positioned around the edges of the page, with some appearing to hold or support the central white area.

# Oracle America, Business Planning and Execution (IBPX)

White Paper: Overview and Key Capabilities

April 30, 2021

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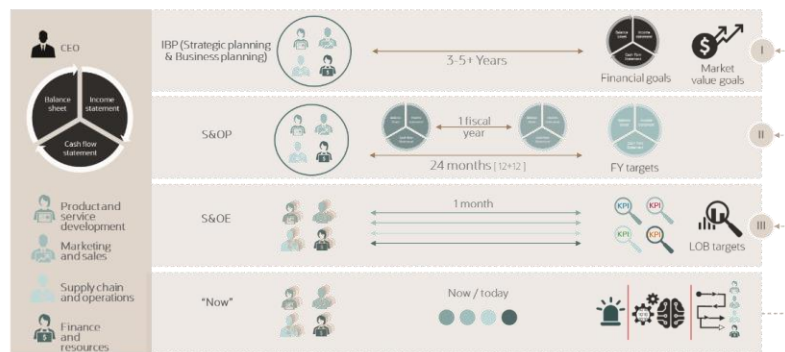
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# Oracle Integrated Business Planning and Execution (IBPX)

**Oracle's Integrated Business Planning and Execution (IBPX)** combines industry leading capabilities in Enterprise Performance Management (EPM) and Supply Chain Planning (SCP) with IoT, AI and prescriptive analytics to deliver a complete Integrated Business Planning and Execution solution that adapts to the demanding needs of global manufacturers. Oracle IBPX enables a single view of the end-to-end business plan and leverages advanced technologies like machine learning and prescriptive analytics to integrate real-time information into planning, thus eliminating decision-making latency.

**Oracle's Integrated Business Planning and Execution (IBPX) platform**



Oracle IBPX provides end-to-end planning capabilities that enables customers to reach their long, medium and short-term performance goals across all business functions. IBPX seamlessly transforms plans into execution and monitors this execution near in real-time to detect unexpected events using IoT, AI and prescriptive analytics. IBPX also provides "What-If" scenario analysis and evaluates the alternatives to maintain or improve upon business targets. Once a new plan is generated incorporating this information, a new cycle starts by transforming the new plan into action using the enterprise execution systems.

Oracle IBPX consolidates all planning into a unified planning framework and delivers a connected planning platform with built-in best practice based planning capabilities across all enterprise business functions (Financial Planning, Workforce Planning, Capex Planning, Project Financial Planning, Long Range planning, Strategic Modelling, Sales Planning, Supply Chain Planning). IBPX seamlessly integrates planning with execution and establishes a solid foundation for business transformation by streamlining planning business processes, improving planning efficiency, and reducing process latency.



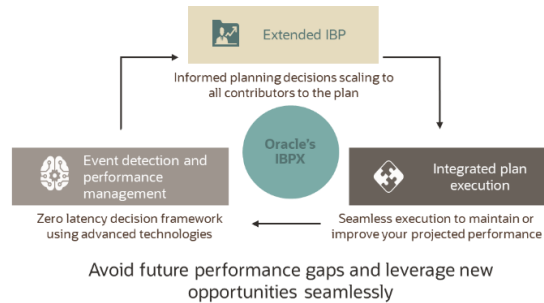
Oracles IBPX is the industry's most comprehensive planning solution with built-in best practices and a highly configurable platform that can address all Supply Chain and Enterprise and Planning use cases, including, Demand, S&OP, Production / Supply, Capacity, Strategic Long Range, Financial, Workforce, Capex, Projects, Operations, Zero Based Budgeting, Cost Analysis, and Management

Reporting. Oracle IBPX includes both Oracle Enterprise Performance Management (EPM) and Oracle Supply Chain Planning (SCP) capabilities in the cloud, thus affording the flexibility to leverage pre-built best practice-based data models and applications for key planning use cases. Additionally, configurable integration with core ERP systems, include pre-built connectivity with Oracle EBS, helps customers leverage their investments and reduce latency in decision making through seamless metadata and data integration, process integration and drill through analysis.



In practice, Oracle IBPX enables a new planning paradigm. The following key architectural elements of this new paradigm are enabled by our IBPX solution:

- Plan: IBPX provides planning capabilities to all roles and all line of business
- Execute: Moves plans to action in a seamless manner
- Monitor: Monitor execution of your current plan and close the loop when unexpected events happen to reduce business decision latency.



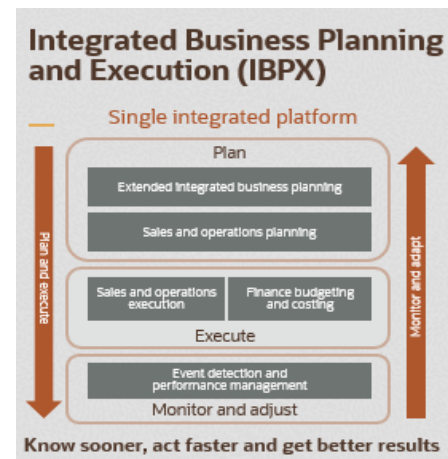
### Extended Integrated Business Planning

Oracle Integrated Business Planning and Execution (IBPX) expands the traditional Integrated Business Planning (IBP) proposition and modernizes it to address today's demanding needs while enabling the following planning areas:

- Long-range strategy planning (IBP), strategic modeling and M&A
- Financial, projects, capital and workforce planning
- Sales & operations planning
- Supply chain planning

Oracle IBPX includes:

**Oracle Supply Chain Planning (SCP)**, our comprehensive cloud-based Supply Chain Planning applications, combine demand insights, supply constraints, and stakeholder input, and apply built-



in machine learning to deliver rich capabilities for S&OP, Demand Management, Statistical and Consensus Forecasting, Replenishment Planning, Supply and Production Planning, and Order Backlog Management and enables seamless execution of the plan.

### Sales and operations planning – S&OP

Embedded best practices

- Run alternative supply plans to respond to changing conditions
- Determine material and resource requirements and/or profitability
- Balance demand, supply, inventory, capacity, and financial targets
- Rerun forecasts within S&OP

Monthly executive review of business plan (actual to budget)

- Track completion date of tasks, activities and action items
- Drive accountability and timely decision in S&OP process

**Oracle EPM**, our market leading Enterprise Performance Management applications in the cloud that enables an integrated platform for Enterprise Planning, Financial Consolidations, Close Management, Supplemental Data Collection, Account Reconciliations, Tax Provisioning, Country by Country Reporting, Collaborative Narrative Reporting, and Hierarchy Management.

### Long range strategic planning

**Long-range / strategic plan**

- Top-down, driver-based
- Model risks, M&A, and strategic initiatives
- Define targets for budget and forecast

**Budget**

- Bottom-up, driver-based
- Connected trial balance
- Connected ZBB, workforce, capital, etc.

**Forecast**

- Bottom-up, driver-based
- Rolling forecasts and predictive planning
- Forecast connected to LRP for what-if analysis

**Capital**

Control capex spend with a clear vision of planned capital needs

**Workforce**

Plan for the workforce of the future with the right talent in the right place at the right cost

**Projects**

Manage and evaluate your project portfolio performance

**Financials**

Full financial statement structure for strategic and operational planning processes

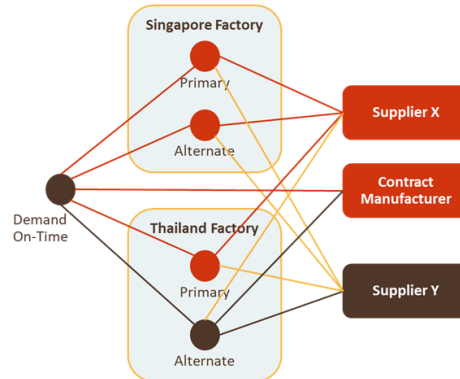
### Integrated Execution

Oracle’s IBPX is the only planning solution that has S&OP (Sales and Operations Planning) and S&OE (Sales and Order Execution) integrated in a unified architecture, thus providing the ability to execute plans seamlessly without losing time and business value. S&OP and S&OE capabilities are not just “connected”, they are within as the same application and hence natively integrated.

- Optimizing operational efficiency while executing the plan through native integration with supply chain execution
- Providing advanced scenario planning
- Enabling a zero-latency backlog management process to maximize revenue, margin, service, etc. at the end of the specific period where you decide to run it
- Protecting profit winners

### Constraint-based supply planning Create best plan for your enterprise that overcomes supply constraints

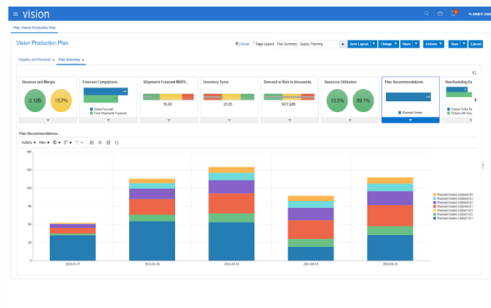
- Enforce lead time constraints
- Model supplier/contract manufacturing capacity constraints
- Evaluate alternate resources and components
- Automate decision making with rules
- Automatically select alternatives to reduce demand at risk of being late
- Increase on-time fulfillment of your customer orders



### Execute your plans seamless, no business value lost

Execute your new plan instantly

- Prioritize work orders for release to execution
- Automatically translate planning recommendations into actions in execution
  - Purchases, manufacturing orders and transfers between organizations
  - Requests to contract manufacturers
  - Reschedules and expedites



### Zero latency customer order backlog management

**Promising overview**  
Prioritize action by customer value, delay

**Pull-in feasibility**  
Maximize service and revenue

**Constraint analysis**  
Identify items or components causing delays

**Execution**  
Release scheduled sales orders

Prioritize orders to minimize delay, maximize margin or meet revenue targets

### Event Detection and Performance Management

To detect and address unanticipated events that could impact your business planning, Oracle IBPX leverages advanced technologies including real-time sensor information, machine learning (ML) pattern recognition and risk evaluation, and traditional rules engines to monitor all relevant planning data. Once an event is detected, IBPX tries address is automatically and, if this is not possible, it notifies the proper person/organization in order to update the plan as needed. This architecture allows IBPX to:

- Provide a holistic view of the value chain

## ORACLE INTEGRATED BUSINESS PLANNING & EXECUTION

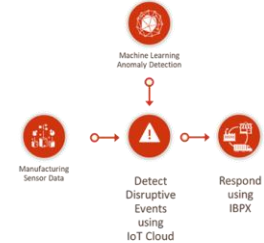
- Manage against strategic targets
- Evaluate against industry benchmarks
- Integrate a complete hierarchy of metrics
- Assess your plans and their execution, diagnose future impact of unexpected events and correct your long, medium- and short-term plans

### Monitor actuals to automate predictions

|                                      | Forecast  | Prediction | Variance |
|--------------------------------------|-----------|------------|----------|
| 4110 Hardware                        | 5,445,714 | 5,445,714  | 23,988   |
| 4120 Support                         | 593,573   | 593,573    | (6,955)  |
| 4130 Consulting                      | 2,133,434 | 2,133,434  | 64,534   |
| 4140 Training                        | 226,141   | 226,141    | 16,140   |
| 4150 Miscellaneous Revenue           | 949,933   | 949,933    | 45,500   |
| Total Revenue                        | 9,342,537 | 9,342,537  | 119,210  |
| 5110 Cost of Sales                   | 6,800,671 | 6,800,671  | (26,630) |
| Total Cost of Sales and Service      | 6,800,671 | 6,800,671  | (26,630) |
| 6800 Salaries                        | 132,203   | 132,203    | 110,372  |
| 6100 Miscellaneous Employee Expenses | 53,916    | 53,916     | 47,463   |
| Total Employee Expenses              | 186,119   | 186,119    | 157,835  |

### Event driven, planning response in IBPX Proactively respond to supply disruptions

- IoT Production Monitoring uses AI/ML to identify anomalies and predictions
- Get visibility into predictive disruptions from IoT directly into IBPX (SCP Cloud)
- Foresee impact on supply chain using IBPX (SCP Cloud)
- Simulate and execute remedial action



In terms of business performance; each prediction, real-time detection, reaction automation, each alternative evaluation, and decision implemented greatly improves planning performance, reduces latency, and provides business value.

| Key Features  | Key Business Benefits   |
|---|---|
| <ul style="list-style-type: none"> <li>• Top down and bottom up, driver-based planning and forecast</li> <li>• Risk modeling for M&amp;A and strategic initiatives</li> <li>• Full financial statement structure for strategic and operational planning</li> <li>• Predictive and prescriptive analytics / planning</li> <li>• Pre-seeded S&amp;OP process</li> <li>• Near real-time demand-supply balancing</li> <li>• Real-time backlog management</li> <li>• Automation of predictions and correction actions based on actuals</li> <li>• AI-enabled operational planning</li> <li>• IoT and sensor data flow integrated with automated decisions</li> </ul> | <ul style="list-style-type: none"> <li>• Provides end-to-end long, medium- and short-term planning capabilities</li> <li>• Enables a unified data model providing all participants with one view</li> <li>• Seamlessly integrates S&amp;OP and S&amp;OE</li> <li>• Detects future gaps and provides alternative scenarios to adapt</li> <li>• Uses sensor data and advanced technologies to detect unexpected events</li> <li>• IBPX footprint and deployment options easily adapt to changes in the organization or functional architecture</li> </ul> |

Oracle's IBPX platform is designed to reduce latency in business decision making at all planning levels. The IBPX architecture is designed to:

- Predict events affecting your current and future performance
- Detect events automatically (using real-time sensors data flows, if available)
- Automate the resolution of these events and its impact on the plan in real-time
- Facilitate each LOB role scenario-planning capabilities to easily simulate potential alternatives inline, project business impact of each scenario and assess the underlying risks
- Seamlessly move plans into execution, without losing time or business value



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# Key Capabilities

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## Supply Chain Planning

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Oracle IBPX includes Oracle cloud-based Enterprise Performance Management (EPM) platform and delivers comprehensive enterprise

Oracle Fusion Supply Chain Planning Cloud is a modern and comprehensive solution for accurately planning your supply chain for a broad range of industries. It enables you to perform end-to-end planning processes for a digital supply chain. The facets of digital Supply Chain Planning include:

1. Supply Chain Visibility: The ability to assimilate disparate demand-supply data
2. End-to-End Supply Chain modeling: Including supply chain segmentation, real-time interactive planning, and aggregate & detailed decisions
3. Connected Planning: Unified planning data model for strategic and tactical decisions
4. Automated Resolution: Predictive business insights and guided problem resolution

The Oracle Supply Chain Planning Cloud solution is comprised of modules designed for specific supply chain planning business processes and tasks. These modules include the following:

- Demand Management: accurately sensing, predicting, and shaping customer demand
- Supply Planning: calculate resource and material requirements based on customer requirements
- Sales & Operations Planning: align organizations around an integrated operating plan to meet strategic business goals
- Replenishment Planning: Maintain optimum inventory levels at each node of your supply chain while meeting customer service targets
- Backlog Management: Plan the fulfillment of orders that are at risk of delay
- Production Scheduling: Optimize asset utilization to create optimal detailed production schedules
- Supply Chain Collaboration & Visibility: a collaboration platform that manages cross-company planning and execution processes

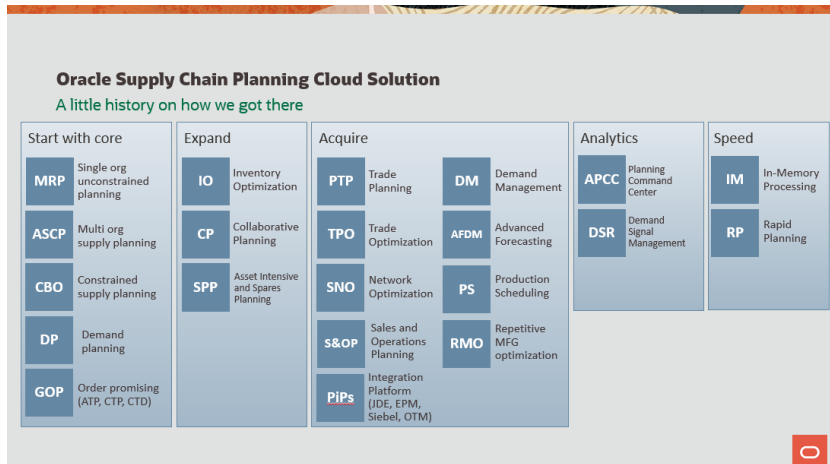
Planners perform these processes and tasks by using work areas. Each of the Supply Chain Planning products provides access to one or more work areas. The Supply Chain Planning work areas that you can use are determined by these factors:

- The products that your enterprise has licensed and configured
- The security privileges assigned to your user account

### Why Oracle Supply Chain Planning Cloud

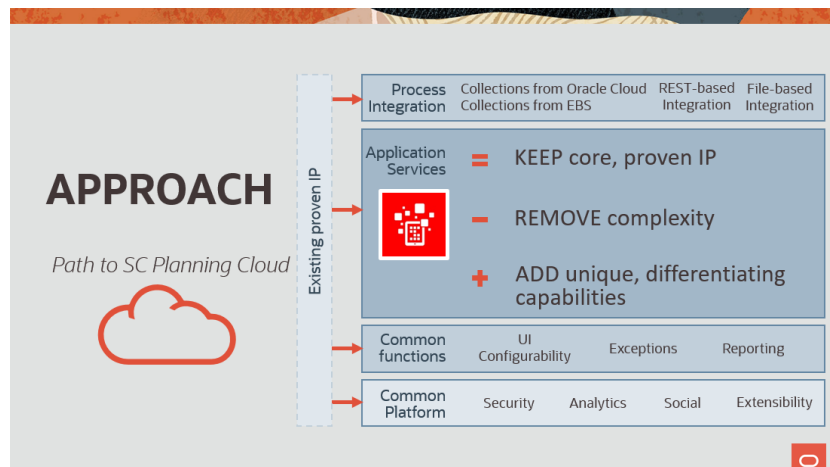
For over two decades, Oracle has developed a comprehensive planning solution, designed for on-premise deployment (or hosted). Our key development paradigm was to never be too monolithic and to be foremost a tool for planners as opposed to assuming that planners cared about coding their algorithms (and spending millions of dollars on that).

Oracle did not get to that broad solution overnight. We started with a set of core applications, expanded that through early collaboration with our customers. We then realized that specific areas required specific knowledge, which we acquired and integrated to. Additionally, as the footprint got bigger at companies, VP's of supply chain wanted more direct access to the planning data and share a common ground for discussion with their planners – so Analytics and S&OP were designed to bring everything together and provide a metrics driven focus. We then expanded into new industries and lastly were asked by customers to address their changing needs to make decisions more rapidly.

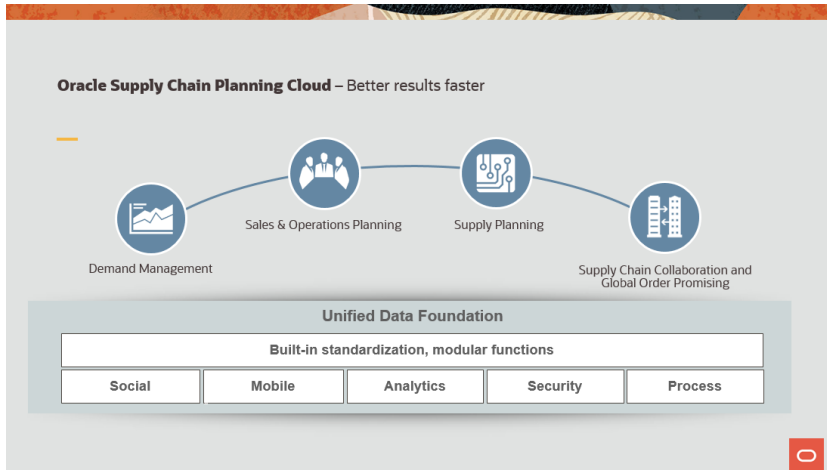


When Oracle started thinking about our next generation solution for the Cloud, we came up with an approach that we believe will give us the best possible Planning Cloud solution in the market. There are 4 key elements to making this happen:

1. Build a common platform that addresses the needs around single data model, security, ROLAP, OSN-based enterprise collaboration, UX, mobile, and Extensibility (i.e. REST services)
2. Build a set of common functions that are common for several planning apps: planner level security, customizable workspaces, user-defined metrics and dimensions, search and favorites, solvers (IP), archive, and attributes (gray means still under development)
3. Build new application services leveraging the common platform and functions
4. Build process integrations with other Oracle Cloud solutions to get the 1+1=3 benefit of the broader ecosystem: ERP, BI, EPM, OTM, IoT, CX, PLM, TOA, A.I. platform, etc.



This approach led to Oracle building Fusion Supply Chain Planning Cloud on top of a single unified data model that can be leveraged no matter what planning activity is being accomplished. Additionally, configurable analytics & visualization layers have also been employed to provide a consistent stream of information for key supply chain decision makers.



The resulting benefit has been increased decision-making power placed in the hands of the planner while decreasing planning latency from having to deal with disparate data models.

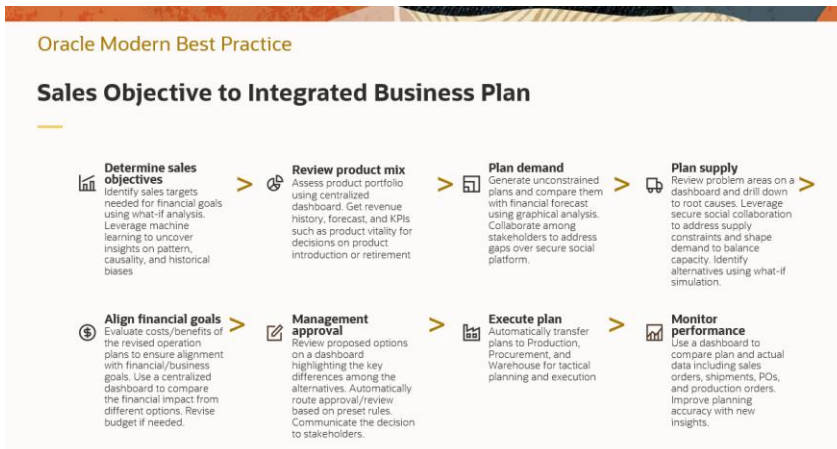
**Why Change**

Oracle Fusion Supply Chain Planning Cloud supports Oracle’s Modern Best Practice (MBP) framework that helps businesses orchestrate supply chain operations quickly and accurately to achieve your financial goals and respond to the unexpected. MPB establishes a process that focuses on the following:

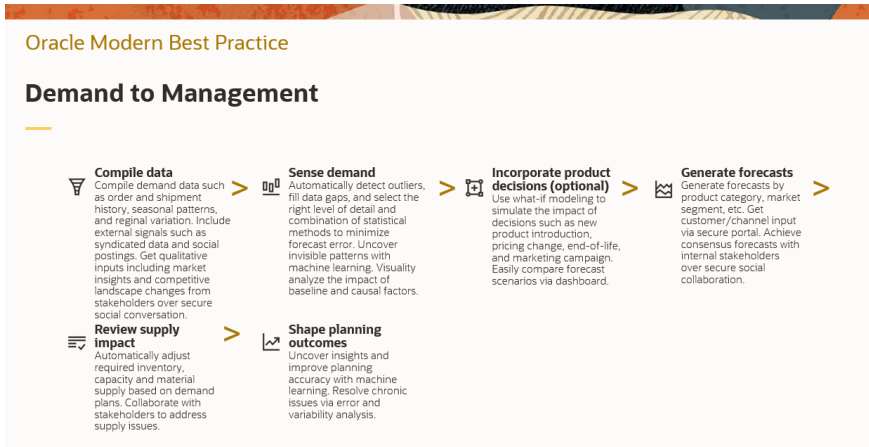
- Digital business processes that evolve with the business
- End-to-end across the organization
- Leverages emerging technologies

Specifically, for Supply Chain Planning, the following best practices are supported:

- Sales Objective to Integrated Business Plan



- Demand to Management



- Demand Forecast to Supply Plan



## Demand Management

Oracle Demand Management’s embedded best-in-class processes orient your demand planning process around your customer. You can analyze and dynamically segment customer demand, manage demand variability, handle frequent product introductions, or plan demand of configured products and options. This customer-centric segmentation drives inventory policies and fulfillment to connect demand and supply. Comprehensive analytics, social collaboration, and mobility features enhance your insights and promote teamwork, enabling your organization to accurately sense, predict, and shape demand.



## Supply Planning

Today's supply chains are complex, with multiple tiers of internal and external nodes. You must plan for a global network of in-house production and distribution facilities, contract manufacturers, drop-ship suppliers, and outside services providers. Also, you may need to manage discrete, process, and configure-to-order manufacturing processes.



Oracle Cloud Supply Planning accounts for lead times, shipping and receiving calendars, as well as material and capacity constraints across your extended supply chain so you know when you can realistically meet demand. With its comprehensive network and sourcing model, you can trade off internal vs. external production capacity, configure drop-ship relationships, consolidate supply at your own facilities, or identify when a second-tier supplier's limited capacity could put demand at risk. You can choose to manage your network with a few global rules, or tailor your planning for each high-value component at a critical facility.

## Sales & Operations Planning

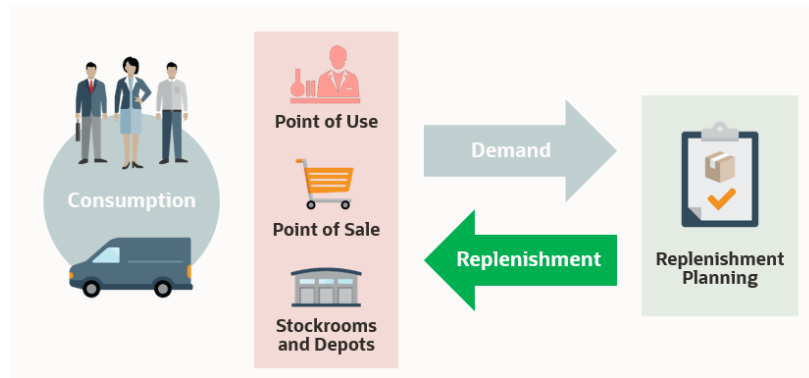
For too long, S&OP has been regarded as just a process for balancing supply and demand. With the right process and software, S&OP can achieve its true potential and become a powerful means for executing your overall business strategy, a process also referred to as integrated business planning. Oracle Cloud S&OP enables this process by monitoring the health of your product portfolio, ensuring that your demand plan achieves company revenue targets, while generating a supply plan to profitably meet demand, and, reconciling your operating plans with your overall financial goals. The key to consistently and profitably executing on your strategy is aligning your organization around a common set of forward-looking metrics and a shared operating plan for achieving these metrics. And when it's time to move plans into execution, you will want a solution that can translate S&OP decisions into tactical plans, and then continuously monitor your performance to ensure you are staying on target. Oracle Cloud S&OP makes all this possible with a next-generation S&OP solution.



Oracle Cloud S&OP changes the game with comprehensive capabilities that are not only easy to use but can evolve with your business. It's tightly integrated with the rest of Oracle Cloud Supply Chain Planning, so you can seamlessly share demand and supply information within the same user interface.

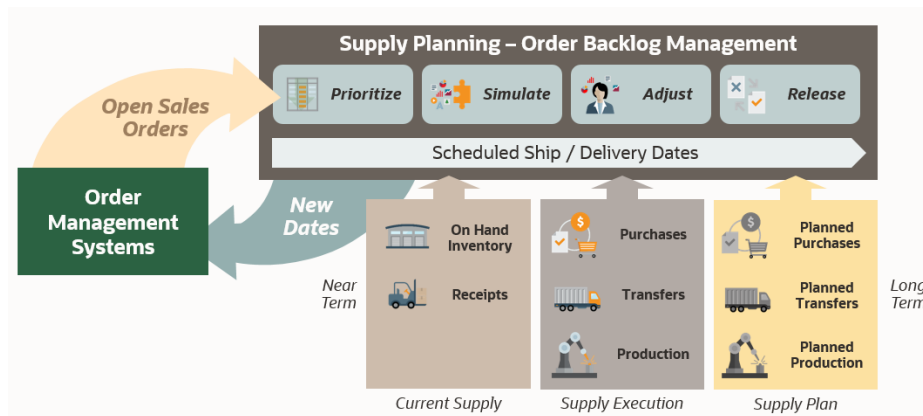
## Replenishment Planning

Oracle Replenishment Planning features help planners predict consumption and meet replenishment challenges. Since it's a component of Oracle Demand Management Cloud, so it has world class forecasting capabilities to that anticipate trends, seasonal demand changes. Replenishment Planning segments items, organizations, and customer sites into groups with similar consumption patterns, so you can manage replenishment through policy settings. Real-time analytics highlight any shortages or overstocks, and online simulation helps you correct issues on the spot.



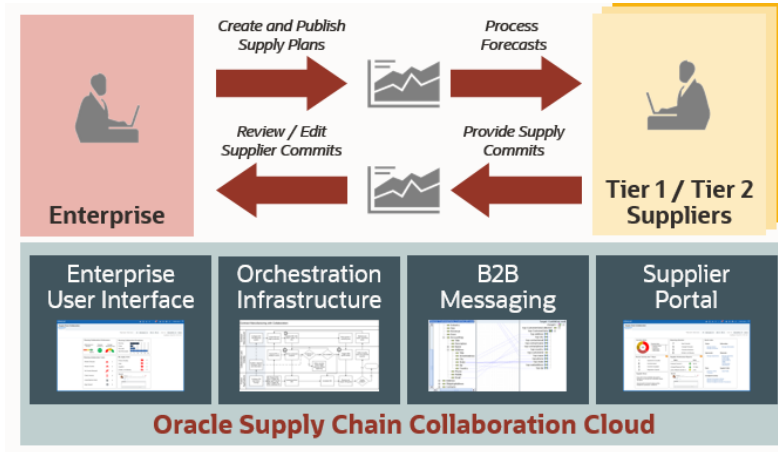
## Backlog Management

Oracle Supply Planning's Backlog Management features help you reprioritize and reschedule your open orders using the latest supply information. You can simulate fulfillment alternatives based on your business objectives. Then when you're satisfied with the results, you can save and release Backlog Management's scheduled date changes to reduce delivery delays, increase sales or achieve margin targets.



## Supply Chain Collaboration

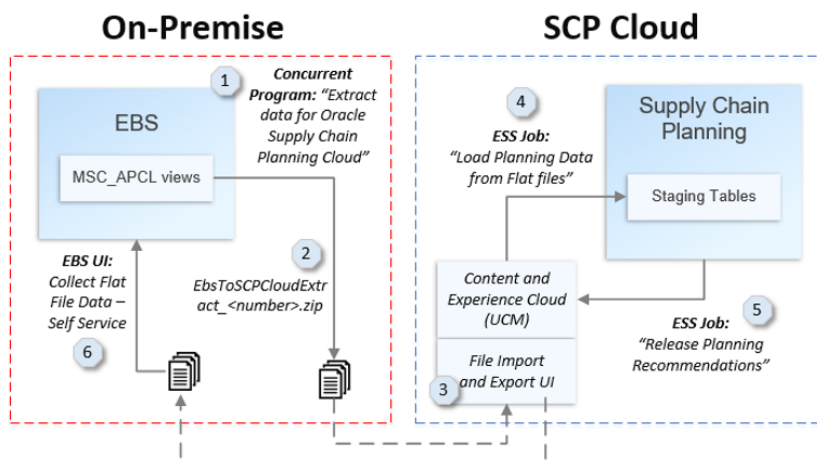
Oracle Cloud Supply Chain Collaboration engages your trading partners in decision-making to reduce the impact of supply chain disruptions. It helps to increase supply visibility, automate vendor managed inventory practices, and secure supplier commitment to order forecasts.



## Integration to EBS

Oracle Supply Chain Planning Cloud provides E-Business Suite customers with capabilities in Supply Planning, Demand Management, Sales and Operations Planning, etc. Predefined integration between Supply Chain Planning Cloud and E-Business Suite allows E-Business customers to continue to use their current supply chain fulfillment processes for operations while leveraging the advanced capabilities in supply planning, forecasting, simulation, and analysis offered by Supply Chain Planning Cloud applications.

The tight integration provides an easy way to bring data from E-Business Suite Supply Chain execution modules to Supply Chain Planning Cloud and the ability to send plan recommendations to the E-Business Suite modules. Together these integrations deliver rapid deployment capabilities and help customers avoid the need to build custom integrations that require processing and transformation of data.



The integration supports not only the configuration of integration of one EBS system with one SCP cloud system as described above but also multiple EBS systems to multiple SCP cloud systems to support advanced deployments like multiple business units with different EBS systems.

## Enterprise Performance Management

Oracle IBPX includes Oracle cloud-based Enterprise Performance Management (EPM) platform and delivers comprehensive enterprise planning capabilities for all financial, enterprise and free-form planning use cases. It also enables a core set of configurable Key Performance Indicators (KPIs) for monitoring plan performance.

### Financial Planning and Analysis

Oracle EPM enables FP&A transformation by providing best practice based configurable modules for key FP&A use cases (P&L, Balance Sheet, Cash Flow, Revenue, Expenses, Capital, Tax) on a platform that is connected and responsive to changes in the business environment.



- Leverage Out-of-the-Box Modules → Integrated Financials (P&L, Balance Sheet, and Cash Flow Statements) to realize value quickly versus building everything from scratch

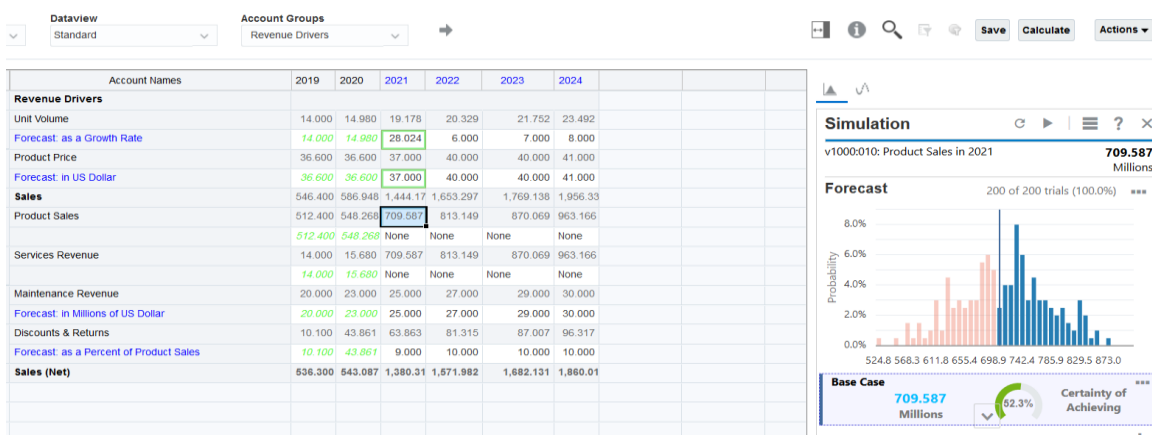




- Enable Revenue Modeling flexibility through Driver-Based, Adjustments, and What-If Scenarios to evaluate options to manage change and react to business demand or changes quickly for better decision making
- Perform Centralized Expense Planning → Bottoms-Up plans through our modern user-interface to Collaborate and have Accountability into the process with notes, change history
- Manage and Monitor Key Performance Indicators (KPIs) → Industry Metrics Best Practices or Unique business KPIs to track and monitor based on business requirements can be displayed on Dashboards, Reports, Forms, or presented in a high-graphical Book of Reports for better decision making
- Enable Rolling Forecasts, a common as a strategic transformation initiative that provides the ability to model and forecast out 5-years, 10-years based on history, drivers and assumptions, by leveraging out of the box Assumption drivers, or advanced analytics like Simulation, predictive analytics, Goal-Seeking is a key differentiator of our solution compared to other vendors.
- Capital, Tax planning are all out-of-the-box standard functionality to enhance the FP&A transformation:
  - Capital Planning – plan new, existing assets and manage and leverage out of the box depreciation methods
  - Tax Planning – better understand the complexities of Tax planning and the inflow and outflow of data to make up the Tax Account easily and efficiently.

## Strategic Long-Range Planning

**Strategic Long-Range Planning** is a configurable EPM business process included in the Oracle Integrated Business Planning and Execution (IBPX) solution that enables facilitates planning and modelling of long-range strategic goals that are linked into the financial plan. It includes configurable out-of-the-box robust content for handling use cases for consolidation/aggregation of the data, building specific models (e.g. 5-year or 10-year plans for an Acquisition or new Product Line), Account forecasting, Advanced features like Simulation (Monte Carlo) and Goal Seeking with an Audit Trail to maintain transparency.



- Plan Long-Range by Business Case or Models such as 5-year outlook for an Acquisition or a New Business Venture, compare and analyze financial impact
- Easy-to-use wizards and pre-built content and drivers allow planners to maintain complex application, but with self-service features and content to minimize errors
- Pre-built dashboards and reports help analyze data

- Empower users to perform “what-if” impact analyses to inform key decisions
- Robust features like Monte Carlo Simulations, Goal-Seeking, Funding Options, and Audit Trail to complete the Long-Range with Accuracy and Confidence. Long-Range Plan and Bottoms-Up plans can also be synchronized bi-directional
- Connected module that has pre-built financials like Income Statement, Balance Sheet, Cash Flow (Direct and Indirect) to automatically update as planning scenarios to better make key decisions
- Built-In Key Performance Indicators or Business-Defined KPIs to meet Requirements

## Sales Planning

Sales Planning in Oracle EPM provides an extensible framework for planning and managing sales performance. Sales Planning enables you to automate critical processes by eliminating spreadsheets in key sales operations processes and improves collaboration for planning, modeling and reporting of sales quotas, attainment, and sales forecasts.

Sales Planning is extensible using the EPM Cloud platform to further add additional configurations and personalization into your sales planning application with custom navigation flows, dashboards, and infolets. Use tasks and approvals to manage the quota planning process. Sales Planning can be integrated with Oracle or other Sales Force Automation solutions for pushing quota targets to incentive compensation or bring in actual attainment.

- **Connected sales planning** - Improve sales execution and operational efficiency across quota planning to sales forecasting with Oracle’s predictive and intelligent planning solution.
- **Predictive planning** - Optimize your market coverage and intelligently set territory and quota plans with AI-driven predictive planning capabilities.
- **Flexible modeling** - Better understand your plans and models with multidimensional and drillable what-if planning by territory, product, account, channels, seasonality, and more.
- **Smart view** - Give sales operations the power of an enterprise planning platform that they can use from the comfort of a familiar Excel interface.



## Quota Planning

The Quota Planning business process offers top-down and bottom-up target quota planning by territory, product, account, or other custom dimensions. Use Predictive Planning and what if scenario planning to explore and compare different quota scenarios for informed decision making. Quota Planning builds best practices into its content, including its forms, calculations, dashboards, infolets, drivers, and measures.

## Advanced Sales Forecasting

Advanced Sales Forecasting provides a robust platform for the sales forecasting process, allowing multidimensional sales forecasting across territory, products, accounts, channels, or other custom dimensions. It offers sales teams connected sales planning with integration between Quota Planning, compensation planning, and sales forecasts. With Advanced Sales Forecasting, you can plan at the weekly or monthly level, and use a rolling forecast if your business requires it.

### Key Account Planning

Key Account Planning provides a data driven approach to sales baseline planning and impact of trade promotions on sales plans. This results in an overall view of the customer profit and loss including an assessment of promoted and non-promoted volume and revenue by customer and product group. Key Account Planning helps key account managers plan trade promotion strategies in order to optimize their trade spends and offers collaborative sales planning. By using baseline planning and promotion planning, key account managers or sales managers can perform gap analysis and see the uplifts - the impact on sales volume or revenue - from running trade promotions.

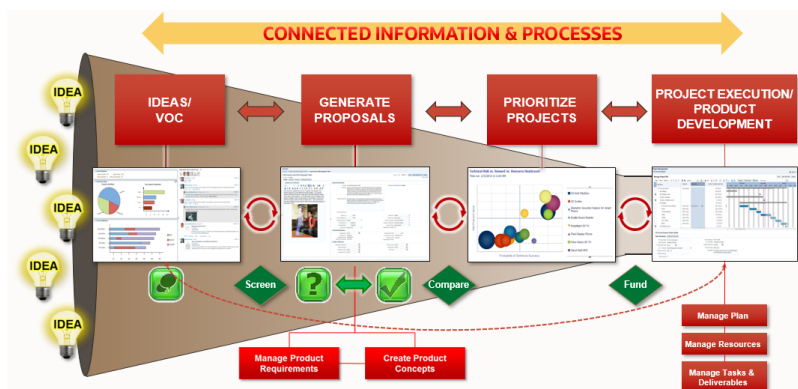
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## Innovation Management

Oracle Innovation Management promotes the abilities of the enterprise to build the best products. Innovation Management enables a company to:

- Collect ideas from different sources, collaborate on them, identify the best opportunities, and promote them as new or enhanced proposals;
- Identify key elements to build detailed requirements for these proposals;
- Analyze their proposals using OTBI analytics; and
- Develop concepts supporting those proposals to ensure that the product goals are met.

These capabilities don't have to be done in any set procession of steps but can be done in any order based on the enterprise's business processes.



The innovation process begins with entry of ideas into the Ideas work area. As ideas are enriched, grouped, and matured, they can be attached to a new or existing product proposal in the more restricted Concept Design work area. Ideas can then be converted into more formal requirements specifications, which in turn serve as input for concept designs.

Another approach might be to develop new concepts without input from requirements or ideas. In this case, appropriate requirements specifications can be incorporated afterward as the concept design matures.

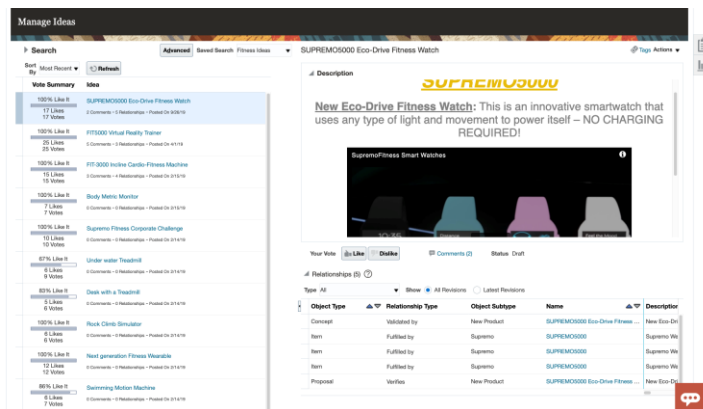
Product concepts and proposals are gathered into a portfolio and Portfolio Management facilitates investment and design decisions based on evaluated factors, objectives and strategies. Once a concept design is approved, structures of product concepts and product requirements specifications are delivered to Product Development Product Lifecycle Management processes for detailed design, creation of prototypes, and ultimately the introduction of a new product or enhancement.

Oracle Innovation Management enables organizations to close the “Innovation Gap” by ensuring that innovation and product initiatives are aligned with organization’s business strategies and operating constraints to:

- **Enable profitable innovations, faster:** Drive faster, smarter innovation and ensure sustainable growth. Oracle Cloud PLM helps you maintain a profitable innovation pipeline fueled by a steady stream of the highest-value, on-target, and relevant ideas.
- **Ideate everywhere:** Capture ideas from any source for new products, services, markets, or customer experiences. Evaluate each proposal across a 360-degree perspective of resource needs, assessed value, cost, and constraints.
- **Manage requirements and concepts:** Document, prioritize, and agree on requirements leveraged in developing innovation concepts. Reuse existing items, trace requirements through design, and validate that each has been met to reduce new product introduction risks.
- **Build agility into innovation portfolios:** Balance core, adjacent, and transformational innovation initiatives while aligning your resources, risk mitigation, and budgets. Use best-practice analysis to select an innovation portfolio that achieves your strategic and profit objectives.

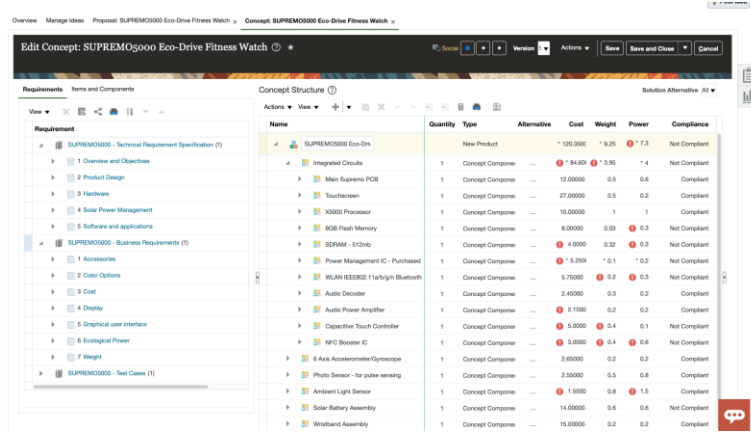
## Product Ideation and Requirements Management

Product Ideation and Requirements Management supports and simplifies the innovation process associated with creating and managing ideas, requirements specifications, and requirements business objects.



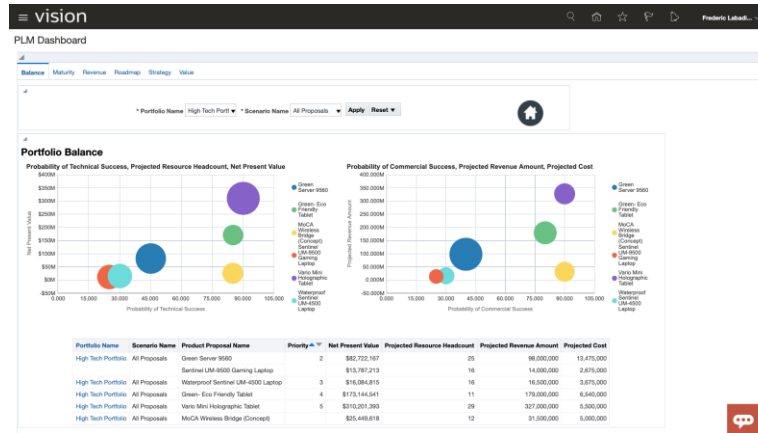
## Concept Design Management

Concept Design Management supports defining a product in its conceptual phase, using concepts and proposals. Requirements, concepts, and proposals are designed to work together closely.



## Portfolio Management

Portfolio Management gathers product concepts and proposals into a portfolio. Portfolio scenarios are modified based on analyses of value, balance, strategy, resources, and product mix.



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# Product Strategy and Vision

Oracle's IBPX solution enables closed-loop Supply Chain Planning, Execution and Enterprise Performance Management capabilities in a responsive and integrated planning platform for our customers. When looking to the future of the Oracle Integrated Business Planning and Execution (IBPX) solution set, Oracle remains focused on the following goals:

- Enable end-to-end planning capabilities for all LOBs
- Seamlessly move aggregated consensus and detailed plans into execution
- Monitor the execution of your plan, continuously.
- Detect, evaluate and react to unexpected events affecting your performance.

## Continuous innovation paradigm

Oracle's vision for IBPX is to enable closed loop planning and execution for all LOBs across the enterprise (FP&A, S&OP, S&OE etc.) while reducing latency in decision making at all levels of the business and delivering net new business value. Oracle IBPX capability enhancements are focused on:

- Better functional coverage: Continued focus on customer enhancements and to deliver new footprint for a wide range of industries
- Easier & simplified planning: Proactive problem signals and resolution that automate tasks related to planning, corrective actions, approvals, & release
- Smarter decision making: Provide enhanced predictive analytics and deep learning with conversational intelligence
- Extensible framework: Flexible processes & integration: REST services 1<sup>st</sup> to further open with microservices. In addition to allowing the ease extensions with Oracle PaaS and partner solutions

All components of the Oracle IBPX solution are undergoing continuous and rapid innovation. Oracle is adding unique planning capabilities to the IBPX by releasing new best practice-based out-of-the-box planning modules and embedding emerging technologies into the planning platform (prescriptive analytics, advance simulation technologies, real time data flows, ML/AI technologies, fast data processing, IoT for real-time event detection etc.).

Oracle is focused on delivering the vision of an integrated Planning, Execution and Enterprise Performance Management solution that spans all business functions (LOBs) and natively leverages emerging technologies for real-time decision making. Oracle IBPX innovation pipeline is focused on the following areas:

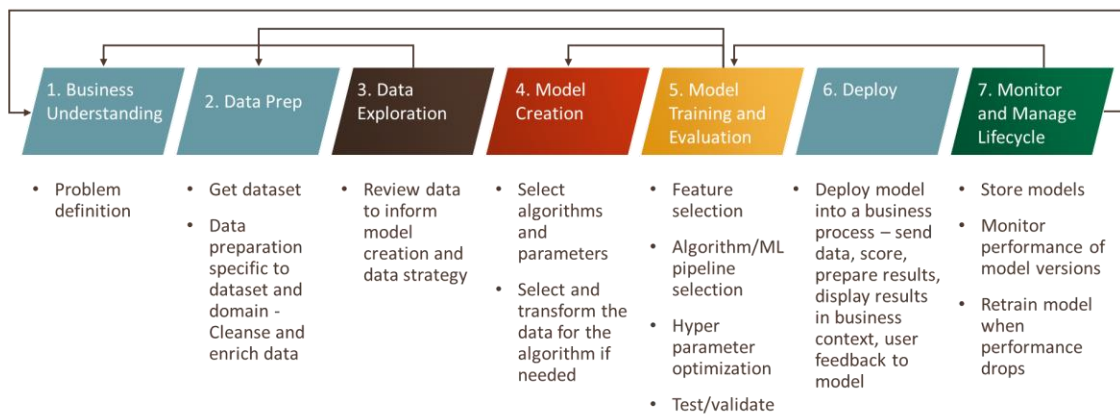
- Application Content
  - New Capabilities
  - Enhancements to Existing Capabilities
- Emerging Technologies
  - Predictive Modelling and Planning
  - AI / ML Driven Decision Making
  - Real-time Event Detection

- User Experience
  - Conversational UIs and chatbots
  - Next-gen User Experience
  - Reporting and Analytics
- Integration
  - Connect to New Data Sources
  - Configurable Bi-directional Connectivity Oracle and non-Oracle Data Sources
  - Automation

**Make intelligent planning a reality (practical and ready to consume)**

There is a clear consensus in the market that AI/ML will play a crucial role in supporting the planning decision making at companies. Oracle’s IBPX solution already incorporates many AI/ML capabilities and our roadmap contains an increasing number of AI/ML powered planning capabilities. The following picture provides a high-level description of our way of approaching AI/ML in our planning platform.

Work & process behind ready to consume ML/AI planning capabilities



Oracle uses a modular process that delivers each new piece of functionality independently, but the new functionality development process ensures that the latest AI/ML technology is always natively incorporated.

Oracle is committed to investing and maintaining our market leadership among business planning platforms through continuous innovation of all our IBPX solution components, available for consumption by our customers on a regular cadence (monthly and quarterly).

Oracle will support and enable your planning maturity roadmap. Organizations can choose to adopt IBPX capabilities and transform their planning processes over time, at their own pace, based on their business imperatives.

# Supplemental Information

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## Data Sheets and Solution Briefs

### Integration Business Planning and Execution

- [Integrated Business Planning and Execution](#)

### Supply Chain Planning

- [Oracle Demand Management](#)
- [Oracle Supply Planning](#)
- [Oracle Sales and Operations Planning](#)
- [Order Backlog Management](#)
- [Oracle Supply Chain Collaboration](#)
- [Production Scheduling](#)
- [Replenishment Planning](#)
- [Global Order Promising](#)

### Enterprise Performance Management

- [Oracle EPM Planning](#)
- [Oracle EPM Scenario Modeling](#)

### Innovation Management

- [Oracle Innovation Management](#)

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## Articles and White Papers

Additional articles and white papers are available in the shared folder.

- [Frost & Sullivan IBP White Paper](#)
- [Oracle's Guide to Modern Supply Chain Management](#)
- [Oracle Supply Chain Management Blog](#)

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## Additional Information

Links to solution information in [Oracle Cloud Applications](#) portal:

- [Oracle Integrated Business Planning and Execution](#)
- [Oracle Supply Chain Planning](#)



- [Oracle EPM Planning](#)
- [Oracle Sales Planning and Performance Management](#)
- [Oracle Innovation Management](#)

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## Product Tours

- [Oracle Supply Chain Planning](#)
- [Oracle EPM](#)
- [Oracle Sales Planning](#)
- [Oracle Innovation Management](#)