



## GENERATING **FINANCIAL PLANNING & ANALYSIS** IMPACT

# Financial planning and analysis services: Enable accurate decision-making while driving efficiencies



The role of financial planning and analysis (FP&A) is to provide timely and accurate information to the enterprise, giving it a competitive edge. Too often, however, FP&A teams are hindered in their efforts by significant roadblocks, such as siloed operations, manual processes, long turnaround times, and diverse record-keeping or ERP systems.

Genpact's finance transformation capabilities encompass FP&A solutions that automate routine tasks and allow companies to generate qualitative business insights at the right time for confident and effective decision-making.

We do this through our in-depth understanding of advanced FP&A operations, and skills in applying design thinking and a Lean Digital<sup>SM</sup> approach to meeting your objectives.

**Solution**

Genpact reimagines enterprise performance management by combining smart processes, analytics, and digital technologies to create advanced operating models. Our solutions are based on our proven ability—honed over the past 16 years—to design, transform, and run intelligent business operations that sense, act, and learn from their actions for clients across industries.

Our global team of more than 1,200 FP&A specialists use Genpact’s proprietary Smart Enterprise Processes (SEP<sup>SM</sup>) framework that links key process drivers to enhanced business outcomes across the FP&A lifecycle.

**Genpact’s FP&A best-in-class offerings include the following:**

**Management reporting**

We help clients standardize and automate processes, streamline reporting, break down silos where information and revenue often get stuck, and drive efficiencies by reducing rework. We examine cost and revenue components in multiple dimensions to understand variances and generate business insights.

**Budgeting and forecasting**

We support businesses throughout the complete budgeting and forecasting cycle with budget

modeling and uploads, budget revisions, variance analysis, and accurate forecasting of operational outcomes in financial terms. We also reengineer budget and planning cycles, enabling clients to make faster and more accurate decisions.

**Predictive analytics**

We support clients with predictive and what-if analyses, data modeling and visualizations, and simulations to generate business insights through Data-to-Insight-to-Action.

**Technology enablement**

We bring together our knowledge of business processes with digital technologies and analytics to deliver business outcomes. Our comprehensive Systems of Engagement<sup>TM</sup> form an agile solution layer that complements clients’ system of records to realize rapid time-to-value, and optimize operational performance and business agility.

Leveraging centralized data warehouses, enhanced visualization, and report rationalization, we provide faster and more accurate insights. We have extensive experience working with multiple ERP systems and business intelligence tools, such as Hyperion, Business Intelligence (BI), Business Warehouse, Cognos, Oracle Optimal Flexible Architecture, Application Desktop Interface, and Discoverer.

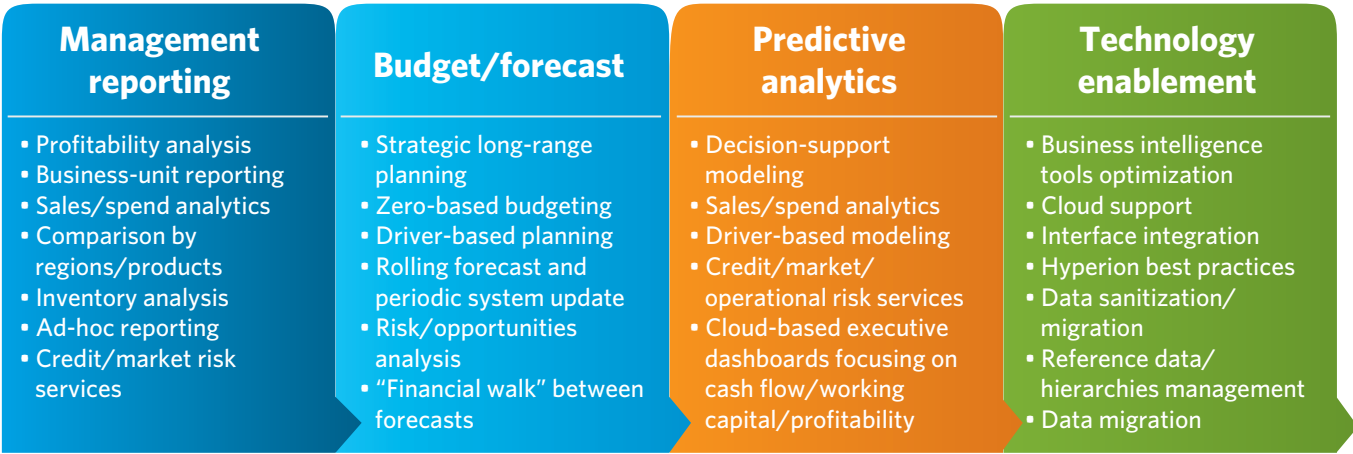


Figure 1: Genpact’s FP&A best-in-class offerings

## Why Genpact

By focusing on where we can deliver the most impact, companies benefit from:

- Our SEP<sup>SM</sup> framework, built on over 200 million accounting events and transactions to ensure clients do not reinvent the wheel
- Comprehensive data and analytics solutions, including technology and people-based support to drive superior scalability and cost-effectiveness
- Robust solutions encompassing process standardization, driver-based planning, world-class KPIs, and defined global hierarchies

- A global practice team leveraging deep experience and diverse industry expertise to push best practices, benchmarking, and transformation
- Access to best-of-breed Systems of Engagement<sup>TM</sup>, FP&A capabilities, and multiple reporting tools

## Impact

Genpact helps large global organizations achieve best-in-class FP&A processes through the effective use of analytics, innovative delivery models, cloud-based tools, and a library of best practices. Our approach cuts costs, reduces reporting requirements, accelerates the time to report to market, and enables more effective decision-making by leadership.



Case  
Study

### 44% reduction in regular management reports for an insurance leader

#### Challenge

An insurance company needed more efficient and insightful management reporting to overcome manually intensive processes, inconsistent reporting formats, and low traceability. The team spent so long on data collation that only 23% of its time went toward quantitative analysis.

#### Solution

Genpact integrated the Cognos BI reporting platform with Oracle general ledger, enabling self-service reporting with high-end analytics in a scalable model.

#### Impact

The redesigned processes reduced management reports by 44% and produced 18% efficiency gains in 18 months.



Case  
Study

### Activity-based costing leads to 18% productivity gain and enhanced analytical capabilities

#### Challenge

A global healthcare equipment manufacturer used multiple input templates for budgeting data, and lacked the ability to generate a client-level P&L forecast.

#### Solution

Genpact's FP&A team standardized and improved the input templates, eliminated rework on consolidation, and created an innovative coding mechanism that leveraged existing data warehouse capabilities to support activity-based costing and swift transactions.

#### Impact

This enabled client-level P&L generation, enhanced the company's analytical capabilities, and helped increase FP&A productivity by 18% in 12 months.



### Challenge

The senior management team at a leading UK-based mortgage lender wanted faster delivery of the financial review reporting presentation and changes that would make it suitable for a wider audience.

### Solution

Genpact partnered with the office of the controller to understand end-user requirements before adding content to existing reports. Then, leveraging the company's existing ERP capabilities, we automated sub-processes and generated customized input data alongside standard input templates.

### Impact

By automating reporting we enhanced controllership, reduced the time required to generate reports, and boosted productivity by 20% in 12 months.

### About Genpact

Genpact (NYSE: G) stands for "generating business impact." We design, transform, and run intelligent business operations including those that are complex and specific to a set of chosen industries. The result is advanced operating models that support growth and manage cost, risk, and compliance across a range of functions such as finance and procurement, financial services account servicing, claims management, regulatory affairs, and industrial asset optimization. Our Smart Enterprise Processes (SEP<sup>SM</sup>) proprietary framework helps companies reimagine how they operate by integrating effective Systems of Engagement<sup>TM</sup>, core IT, and Data-to-Action Analytics<sup>SM</sup>. Our hundreds of long-term clients include more than one-fourth of the Fortune Global 500. We have grown to over 70,000 people in 25 countries with key management and a corporate office in New York City. Behind our passion for process and operational excellence is the Lean and Six Sigma heritage of a former General Electric division that has served GE businesses for more than 16 years.

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