

Is Your IBM Planning Analytics Environment Audit Ready?

Executive Guide for CFOs,
CIOs and Finance Leaders

EXECUTIVE SUMMARY

Many organisations focus on delivering planning functionality with **IBM Planning Analytics TM1** but sometimes overlook governance, security and operational resilience.

An **Independent Health Check** provides assurance that your **IBM Planning Analytics TM1** environment remains **secure**, **compliant** and **sustainable**.

EXECUTIVE RISKS

1. Operational Risk

- Planning processes rely on a small number of individuals.
- Key person dependency increases business risk.

2. Governance Risk

- Can every change be traced?
- Are Development and Production environments separated?
- Are approvals documented?
- Are changes independently reviewed?

3. Security Risk

Financial planning models contain highly confidential information. Can you answer:

- Who has access?
- Who changed what?
- When?
- Why?

4. Technology Risk

Many Planning Analytics environments contain:

- Legacy TI processes
- Unused rules
- Outdated PA versions
- Unsupported configurations

5. Audit Risk

External auditors increasingly expect evidence of:

- Change control
- Segregation of duties
- Access management
- Disaster recovery
- Data lineage

WHAT AN INDEPENDENT HEALTH CHECK REVIEWS

1. Governance

- Change Control
- Version Management
- User Security
- Environment Segregation
- Audit Trails

2. Technology

- TM1 Configuration
- Performance
- Architecture
- Integrations
- Scalability

3. Business

- User Adoption
- Reporting
- Documentation
- Operational Resilience
- Future Readiness

EXECUTIVE DELIVERABLES

Following the Health Check, **MCI** provides:

- Executive Summary
- Risk Assessment
- Technical Findings
- Prioritised Recommendations
- Quick Wins
- Strategic Roadmap

BENEFITS

- Reduced Operational Risk
- Improved System Performance
- Greater User Confidence
- Improved Governance
- Better Audit Readiness
- Protection of your **Planning Analytics TM1** Investment

MCI has specialised in delivering **IBM Planning Analytics TM1** solutions for over 30 years and has helped organisations across banking, manufacturing, mining, healthcare and financial services optimise their **budgeting, forecasting** and **reporting environments**.

