

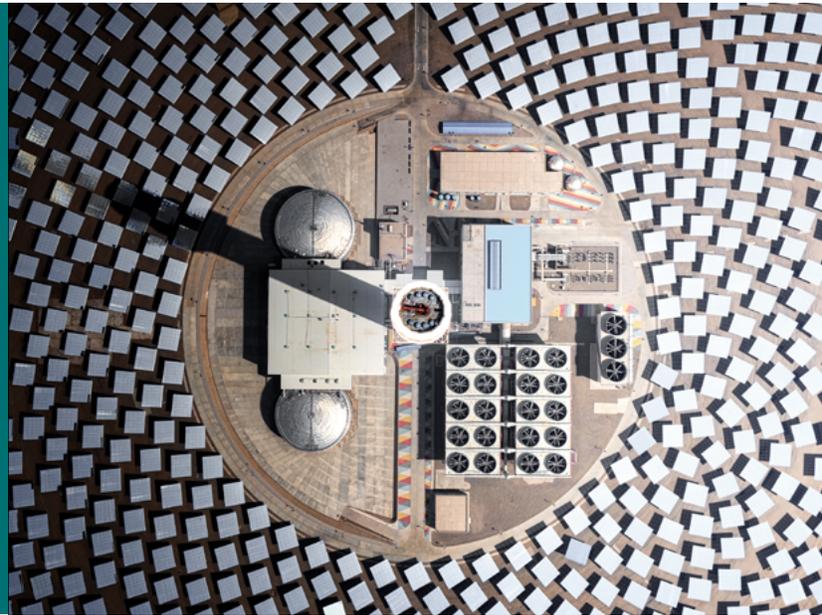
# Shaping tomorrow

Redefining investment and expenditure management

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In an age marked by geopolitical shifts and technological advancements, businesses are steering their way toward growth and stability through sound investment and expenditure management. This journey calls for strategic agility and innovation with an increasing reliance on software-supported methods as the foundation for building adaptable, future-proof organizations.

In industries where significant investments in high-value assets like facilities, infrastructure and manufacturing equipment are crucial, the key to growth hinges on mastering the art of capital expenditure management. This involves striking a delicate balance between anticipating future resource needs and ensuring present profitability. Prompt, data-driven decisions require continuous alignment between strategic planning and operational dynamics.

Consider the energy industry as a prime example. Oil and gas producers must acquire advanced equipment for extracting and refining natural resources. Power companies must invest in the infrastructure necessary to deliver energy. However, traditional investment planning and asset management methods are in dire need of refinement, particularly with the shift toward renewable energy sources. The escalating impacts of climate change are applying pressure on companies to make savvy investments that reshape how energy is generated, managed, distributed and used.

## Deploying digital solutions to optimize investment and asset management processes

Implementing investment and portfolio management software is a strategic move that promises substantial advantages for organizations. These digital solutions introduce efficiency and automation into traditionally complex processes.

### When selecting a software vendor and implementation partner, consider four key aspects that can play a role in the implementation success:

#### 01. Holistic coverage

Opt for a solution that holistically covers investment and expenditure management processes — from strategic planning to operational execution. Streamlining the entire process improves planning efficiency and reduces the time and effort required for approvals.

#### 02. Integrated solutions

Explore an integrated asset management solution with seamless data integration that promotes collaboration between finance and line-of-business managers. This unified approach streamlines planning, enhances decision implementation, ensures continuous tracking and allows for the agile realignment of investments. The result is a single reliable data source, boosting overall data availability and reliability.

#### 03. Harmonized processes

Ensure your solution allows for a coordinated investment management process across borders, considering complexities like applications, vendors, interfaces, service-level agreements and regulations.

#### 04. Expert partner

Pick an implementation partner with expertise in business processes and technology. They can guide you through implementation and offer insights on leveraging innovations like automation and analytics for streamlined processes.

## Embracing software-supported portfolio and investment management for a competitive edge in the energy sector

In a recent PAC survey in Europe (March/April 2023), over 50% of CxOs from the energy and utility sectors identified cost-reduction and efficiency pressures as major challenges. Prioritizing and strategically allocating resources through digital solutions improves budgeting, cuts costs and raises financial health.

### How would you rate the following economic challenges for your company/organization?

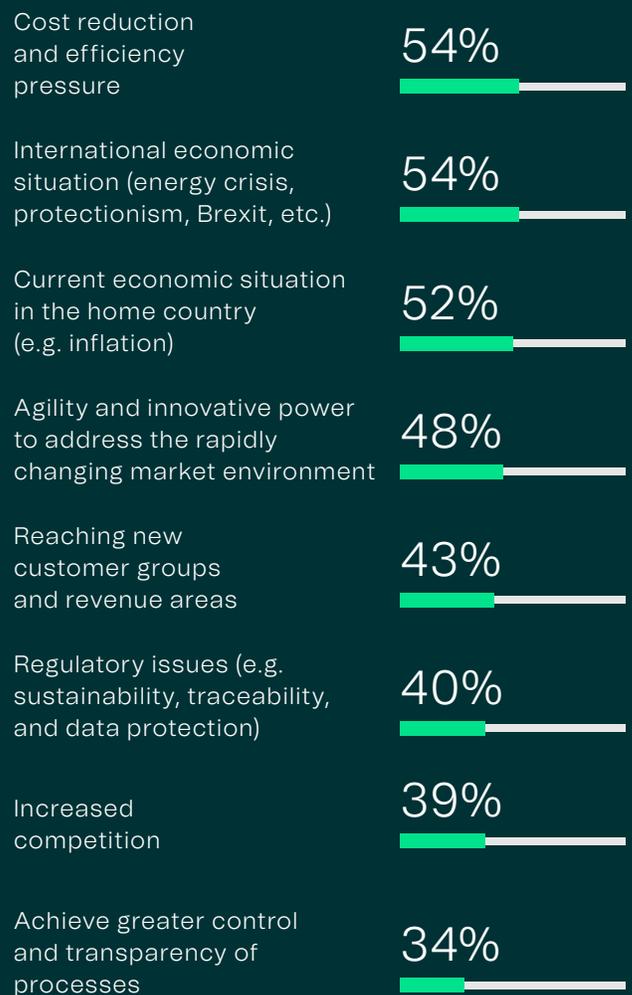


Figure 1: Economic challenges in the energy and utility sector in Europe

When empowered by software-enhanced expenditure management, businesses gain insights into spending, facilitating seamless tracking and enhancing control over financial activities. This proves pivotal as European energy and utility companies strive for greater process control and transparency (see Figure 1).



## Unlocking the potential of SAP software in investment management

The energy sector is transitioning and requires strategic investment and expenditure management. Embracing digital solutions, especially comprehensive software, offers many benefits. However, critical considerations arise during deployment. Discover more on how to fully leverage your SAP system for informed investment management, the importance of reevaluating investment management processes when migrating to S/4HANA and how to enrich investment planning with analytics. Visit [unisys.com/IPIM](https://unisys.com/IPIM).



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