CCH® Tagetik



Datasheet

CCH Tagetik Budgeting, Planning and Forecasting

Plan continuously. Decide with confidence.

CCH Tagetik Budgeting, Planning and Forecasting helps finance teams move from periodic budgeting to continuous planning. Actuals, plans and forecasts run on one trusted foundation, with Expert AI built in, so Finance plans at the speed of the business. Planners spend less time assembling data and reports, and more time modeling scenarios and aligning plans with strategy.

With Predictive Intelligence and explainable Expert AI, finance teams produce more accurate forecasts, see the drivers behind every result and keep control of every decision. Finance anticipates change, reforecasts when assumptions shift and decides with confidence.

CCH Tagetik Budgeting, Planning and Forecasting

Integrated Business Planning

Connect financial and operational planning on one governed model. Operational inputs feed financial plans, so budgets and forecasts stay aligned with strategy and with their financial impact. One version of the truth shows how a change in strategy plays out on the P&L, balance sheet and cash flow.

Explainable Expert AI

Predictive Intelligence identifies correlations across financial, operational and external data to deliver driver-based forecasts that show what shapes performance, and why. Glass-box explainability and human oversight keep Finance in control: planners review, approve or override every AI output.

Plan for any scenario

Model multiple scenarios on the latest actuals and compare outcomes before committing.
Run what-if analysis across entities, products, regions and assumptions, so Finance anticipates what's next and reforecasts in hours, not weeks.

Governed agility at any detail

Unlimited dimensions let planners budget and model with the most detailed drivers, such as SKU, patient or VIN, within one governed enterprise model. Configurable models for every industry and department, with dynamic drill-down into profitability by cost center, product or any operational variable.

Guided workflow and governance

Purpose-built to be finance-owned and maintained, while every department plans in line with the bigger picture. Guided workflows, version control and simultaneous collaboration, with double-entry logic and full audit trails, give the CFO and the board numbers they can trust.

Plan-ready data from any source

AI automapping, anomaly detection and transaction matching reduce plan preparation and surface the key drivers of cost and revenue. Open connectivity and certified SAP S/4HANA integration bring trusted data from the systems, clouds and ERPs finance teams rely on.

"With CCH Tagetik, our budgeting and forecasting cycles have become much faster, and the accuracy of our forecasts has improved significantly. One of the main reasons is that the software provides a single source of truth, integrating data seamlessly from the initial input through to our reporting. This structure, from the ground-level templates to the comprehensive reporting packages, lets us aggregate and report data efficiently, supporting clear and accurate decision-making across the board."

Josh Issertell
Financial Planning & Analysis,
American Crystal Sugar Co.

"Before implementing CCH Tagetik, our financial planning process took 12 weeks. With the new system, we've cut that time down to just seven weeks. The process is now collaborative, easy for everyone to understand, and very flexible to adapt to our changing needs."

Katja de Groot
Head of Strategic Controlling/Corporate Development, Victorinox



Why CCH Tagetik

- Plan continuously on one trusted foundation
- Decide with confidence, with explainable Expert AI
- Adapt to what's next with agility, without rebuilding

Continuous, predictive planning

Finance teams run all core financial planning on one governed model: from budgeting and forecasting revenue and expenses to extended planning across balance sheet, cash flow and capital expenditures.

Predictive Intelligence: out-of-the-box, driver-based forecasting with explainable predictions and actionable insight into cost and revenue drivers.

Expert AI built in: AI automapping, AI anomaly detection, AI driver-based analysis, and more, explainable and embedded across the planning process.

Agentic AI with human oversight: detect, explain, simulate, recommend and keep monitoring, with Finance in charge of every decision.

Rolling forecasts: near, mid and long-term forecasts that update at period end on the latest actuals, straight from the close.

Scenario modeling: model, compare and analyze multiple scenarios at any depth, such as SKU, patient or any cost and revenue model.

Any planning methodology: top-down, bottom-up, zero-based or driver-based, with a library of industry-specific drivers.

Pre-built solution accelerators: cash flow, capital expenditures, workforce, profitability, and product cost planning and control.

Allocation engine: configurable rules and multi-step waterfall allocations across cost centers, products or projects, from days to minutes at any volume.

Unlimited dimensions and time-dependent hierarchies: plan at any level of detail across near, mid and long-range horizons.

Integrated Business Planning: extend planning to supply chain, workforce and ESG, keeping operational plans aligned with their financial impact.

Built on a trusted foundation

One unified platform: planning, close and consolidation, management and financial reporting and disclosure run on the same trusted foundation.

Workflow and collaboration: intuitive dashboards and guided workflows for approval and submission processes.

Self-service reporting and analytics: reports, visual analytics and dashboards without IT, with dynamic pivoting and complex calculations.

Open connectivity: native integration with Microsoft 365 and Power BI, certified SAP S/4HANA integration, APIs and pre-built connectors.

Audit trail and logs: every change, update or adjustment traced by person, date and time for full transparency.

High data volume and performance: in-memory processing of large volumes of granular financial and operational data.

About Wolters Kluwer

Wolters Kluwer (EURONEXT: WKL) is a global leader in information, software solutions and services for professionals in healthcare; tax and accounting; financial and corporate compliance; legal and regulatory; corporate performance and ESG. We help our customers make critical decisions every day by providing expert solutions that combine deep domain knowledge with technology and services.

Wolters Kluwer serves professionals in over 180 countries and operates in more than 40 countries worldwide, helping organizations navigate complexity and drive performance with confidence. The company is headquartered in Alphen aan den Rijn, the Netherlands.

Visit CCH® Tagetik website

CCH® Tagetik
by Wolters Kluwer