

CCH® Tagetik for Integrated Business Planning

Datasheet



Advance and Integrated Insights for Informed Decisions

CCH Tagetik for Integrated Business Planning is a comprehensive application for strategic, financial, supply chain, and operational planning. It helps planners align financial and operational information from across all enterprise to create one cross-functional planning solution that's powered by dynamic data, real-time automation, and AI-based predictions.

Planners, operators and C-level executives can interact and utilize insights from intelligent analytics driven dashboards, guided workflow and collaboration tools designed to align strategy and planning. Financial insights into profitability, cash flow and expenses are derived from planning results tied to operational drivers. By aligning the team on one set of numbers, CCH Tagetik provides increased resilience and closed-loop decision-making to drive continuous improvement across the organization.

CCH Tagetik for Integrated Business Planning

Connect strategy, finance, and operations

See the bigger picture – and the smaller ones. Our solution interconnects all plans and bases them on dynamic information from a central data hub. Financial KPIs, operational metrics, and supply chain data are integrated to support confident decision making. With cross-functional visibility into strategy, finance, supply chain, and operations, management can align around long-term strategic plans and adapt to shorter-term execution challenges.

Align finance, supply chain, workforce and product teams

Bring all plans together under one decision support system. Our market-leading integrated business planning solution supports all functional planning, including FP&A, supply chain, production cost planning and control, workforce, capital expenses, and cash flow planning. All departments can plan and forecast while staying aligned with the bigger picture.

Dynamic AI-based predictions

Improve the accuracy and speed of forecasting. Precision modelling lays the path toward desired business outcomes utilizing AI predictive intelligence. Forecast demand for any industry, product type, or time-period using probabilistic AI-based predictive algorithms. Advanced predictive intelligence adjusts plans and forecasts continuously as it learns from your company's performance over time.

Increase resilience with real-time impact assessment

Improve agility, drive growth, and navigate change. Real-time impact assessments show you the financial impact of any supply chain, strategic, or operational decision. When product, customer, supplier, geographic and organizational data changes, plans dynamically update giving you the insight to change course or stay the course.

Implement quickly, expand easily

Aligning the organization on Integrated Business Planning is usually a phased approach. Our Financial, Operational and Supply Chain products are integrated on our CCH Tagetik Intelligent Platform ensuring a common user experience and ease of design. Broad integration capabilities, pre-built data models and associated workflows accelerate the design and build of models to support your strategy today and are adaptable to your next steps

Complete transparency and accountability

Keep a finger on the pulse of all enterprise plans. Our platform fosters transparency and accountability. Changes to all budgets, plans, forecasts, data and reports are captured in a detailed audit log. Managers can standardize and monitor each planning process using a process workflow.

"One of the biggest improvements has been transparency. We now have full visibility into our financials, which allows us to collaborate across functions more effectively. Instead of having data in silos, everyone can access the same information, and we can make cross-functional decisions based on real-time insights."

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

"The workforce planning module has allowed us to plan, report, and analyze compensation and benefit items down to the lowest level, which has drastically reduced our month-end variance research and reporting time.

Brian Strohecker
Budget & AP Manager
Members 1st Federal Credit Union



Key benefits

- ✓ Accelerate planning cycles
- ✓ Make better-informed decisions
- ✓ Increase financial resilience and optimize costs by integrating strategic, supply chain and operational drivers
- ✓ Align global organizations and operations

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Addressing Common Challenges

The technology for truly integrated IBP is now ready: In the past, automation, data processing, and ETL weren't advanced enough to facilitate true integrated business planning. But times have changed. Our advanced AI predictive intelligence and integrated data platform organizes vast amounts of data and interconnects enterprise plans, making true integrated business planning - possible.

Expectations on Finance leaders is rising. Top analyst firms in planning recognize the expectations for the Office of the CFO are rising in terms of ensuring strategy is executed and responsiveness to operations is timely and flexible. Adoption of new technologies such as AI and automation tools for data processing, reporting and analyzing need to be successfully adopted and integrated.

Coordinated Response Meeting revenue targets, cost reduction and understanding drivers of each remain priorities for financial leaders and increasingly this means consolidating planning processes across the organization. IBP fosters collaboration, provides visibility and keeps financial performance at the heart of every supply chain decision, every operational plan, and every executive strategy.

Integrated Business Planning



- **All-in-one integrated business planning (IBP) solution:** Our solution features market-leading FP&A, Supply Chain and Workforce Planning across the enterprise.
- **All industries:** We support industries with specific planning functionality for banking, services, insurance, manufacturing, automotive, high tech, fashion, pharma, and retail.
- **In-depth planning, modeling and analysis:** Plan, model and analyze performance at any depth, like SKU or patient level or any cost level/revenue model your business needs. Power BI integration enhances analytics.
- **AI-based simulations:** Simulate the impact of market events on KPIs and performance. Test out strategic, operational, financial, or supply chain plans before turning them into real-life strategy.
- **Probabilistic planning:** Better plan for uncertainty with the forecast view of the low, medium, or high ranges and then plan to mitigate the risks.
- **Dynamic, real-time data:** All plans are based on approved, real-time data. With the click of a button, plans refresh showing you actuals, and their impact, instantly.
- **High power data processing:** The CCH Tagetik Analytic Information Hub is a powerful processing engine that centralizes data from any source system into its data hub for use in planning, forecasting, and other financial management processes. SAP certified Integration to S/4 Hana allows customers to leverage the power of SAP.
- **Rolling Forecasts:** Extend planning and quickly produce rolling forecasts. Combine data from strategic plans, budgets and actuals, make continuous cost adjustments and reset revenue targets to produce a more accurate projection of fiscal year results.
- **Self-Service Reporting & Analytics:** Produce reports, visual analytics and dashboards without IT. Complete complex calculations, create reports and dynamically pivot data for analysis without delay.
- **Microsoft Office Integration:** CCH Tagetik natively integrates with Word, PowerPoint and Excel and supports multiple output formats including PDF, PPT, HTML and XML.
- **Audit Trail & Workflow:** Capture detailed audit logs of all changes — by who and when. Guided workflow and collaboration tools support organizational alignment with task lists, status and approval process.
- **System Integration:** CCH Tagetik has an open architecture and built-in ETL to fit seamlessly into an existing Microsoft, SAP or mixed technology environment.

About Wolters Kluwer

Wolters Kluwer (WKL) is a global leader in professional information, software solutions, and services for the healthcare; tax and accounting; governance, risk and compliance; and legal and regulatory sectors. We help our customers make critical decisions every day by providing expert solutions that combine deep domain knowledge with technology and services. Wolters Kluwer reported 2020 annual revenues of €4.6 billion. The group serves customers in over 180 countries, maintains operations in over 40 countries, and employs approximately 19,200 people worldwide. The company is headquartered in Alphen aan den Rijn, the Netherlands. Wolters Kluwer shares are listed on Euronext Amsterdam (WKL) and are included in the AEX and Euronext 100 indices. Wolters Kluwer has a sponsored Level 1 American Depository Receipt (ADR) program. The ADRs are traded on the over-the-counter market in the U.S. (WTKWY).