Buyers Guide for AI-Powered Planning and Analysis Solutions

Performance Management Buyers Guide Series

2026 Edition

Buyers Guide for AI-Powered Planning and Analysis Solutions

Overview

The BPM Partners Performance Management Buyers Guide Series is designed to provide an unbiased and up to date view of the latest trends, developments, requirements, best practices, and vendor options in the world of business performance management. The information provided is intended to enable companies to have meaningful and informed discussions as they plan their performance management projects.

Planning and Analysis Solutions

FP&A solutions are still the top priority for most companies when evaluating performance management systems (BPM, CPM, EPM, FP&A Systems, Extended P&A Systems). A growing number of vendor selection projects are now also including financial consolidation, close, and reporting in their evaluations as well (see our Buyers Guide for AI-Powered Financial Consolidation, Close and Reporting Solutions for more information). While the number of planning and analysis solutions continues to grow, most newer vendors tend to be narrowly focused and don't offer a unified solution that includes financial consolidation and/or other key elements of a modern performance management solution. *This Guide is focused on vendors that offer a strong FP&A solution as part of a broader performance management offering.*

A key goal of this Guide is to help you understand what you should expect from a modern planning and analysis solution. To accomplish this we include data from our most recent BPM Pulse Research Study of hundreds of your peers sharing their experiences with purchasing and utilizing performance management systems. While the top priorities haven't changed much in recent years – improve management reporting, focus on systems that are easy to use, scalable, and require minimal IT support – there are significant changes in priorities one level down. One of the key changes you'll see is that operational planning has become almost as important as financial planning with companies focused on revenue planning, workforce planning, sales performance management, and supply chain planning. Forecasting priorities have also changed with organizations focused on increasing forecast frequency and accuracy, looking for more sophisticated scenario planning capabilities, and yes, beginning to leverage predictive forecasting.

We changed the name of the Guide this year to reflect the fact that just about every performance management solution today is 'AI-Powered'. This means that the vendor has integrated and embedded AI capabilities throughout their product. While actual AI adoption in Finance still lags, interest and trials have increased significantly. Even if your company (or your data) is not ready for AI today, you should still evaluate the AI capabilities of any new performance management solution so that you don't need to look for a new solution when you are AI ready.

Requirements

Budgeting, Planning & Forecasting	Operational Planning & Profit Optimization
• A budgeting process that takes too much time and effort for too little return • Not enough end-user participation resulting in limited buy-in • The need to increase re-forecast frequency and accuracy	• Difficulty in determining true profitability of products, services, regions, business units • The need to obtain a holistic view of the business and understand impacts • The ability to tie operational plans to financial results

Most organizations know why they need a new financial and operational planning system, and it's usually because they are facing one or more of the challenges highlighted in this graphic. Often it is because they lack a modern, integrated AI-powered planning solution. Maybe they are still trying to use standalone spreadsheets as a budgeting 'system' or still relying on a legacy performance management system that is difficult to use, or trying to stretch their existing ERP, or reporting solutions to take on planning. Once they recognize the need, the challenge then becomes trying to define exactly what they require from a new system. Requirements need to be spelled out with an adequate level of detail to enable the successful selection of a new solution.

Planning and Analysis Requirements

To help you begin thinking about your own requirements, in the next few pages we will share data from your peers, collected as part of the most recent BPM Pulse Research Study. We will examine their challenges, what they prioritized during their own search for a new budgeting and planning solution, and what the results looked like. Below is a demographic profile highlighting the largest respondent groups.

Responses

370

Industries

Manufacturing (process), financial services, healthcare, construction, transportation/logistics, technology

Company Size

Small 4%

Midmarket 54%

Large/Enterprise 42%

Geography

North America 58%

Europe 25%

Asia/Australia/NZ 17%

Business Area

Finance/Accounting 65%

Senior Executive 11%

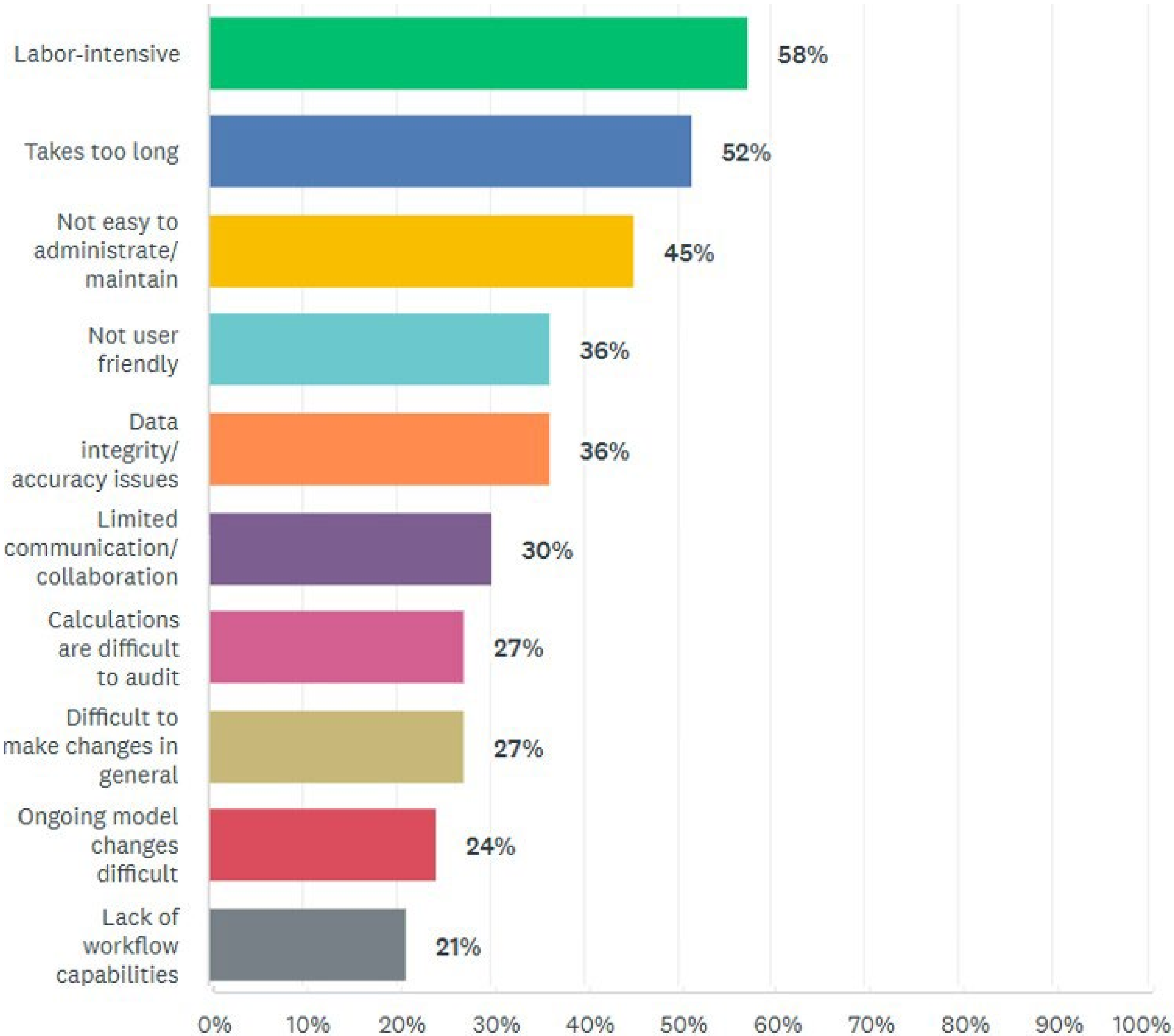
IT 17%

Performance Management Research Study Results

BPM Pulse 2025

Date: March - May 2025

Budgeting and Planning Challenges



Source: BPM Partners 2025 BPM Pulse Survey

Once again, the survey respondents who said they were dissatisfied with their current budgeting/planning processes and systems gave the same top two reasons as in prior years: it takes too much time and effort. This certainly sounds like a need for streamlining of tasks, more automation, and an opportunity for agentic AI to assist. The next item on the list is 'not easy to administrate' and this highlights an issue we sometimes see in our vendor selection projects. When evaluating a new solution companies tend to focus on ease of use for budget contributors but neglect the needs of the smaller group that maintains and administrates the solution. The complaints around workflow and collaboration usually come from companies still utilizing standalone spreadsheets as a solution. Modern FP&A solutions incorporate strong collaboration and workflow capabilities.

Key Features of a Budgeting and Planning Solution

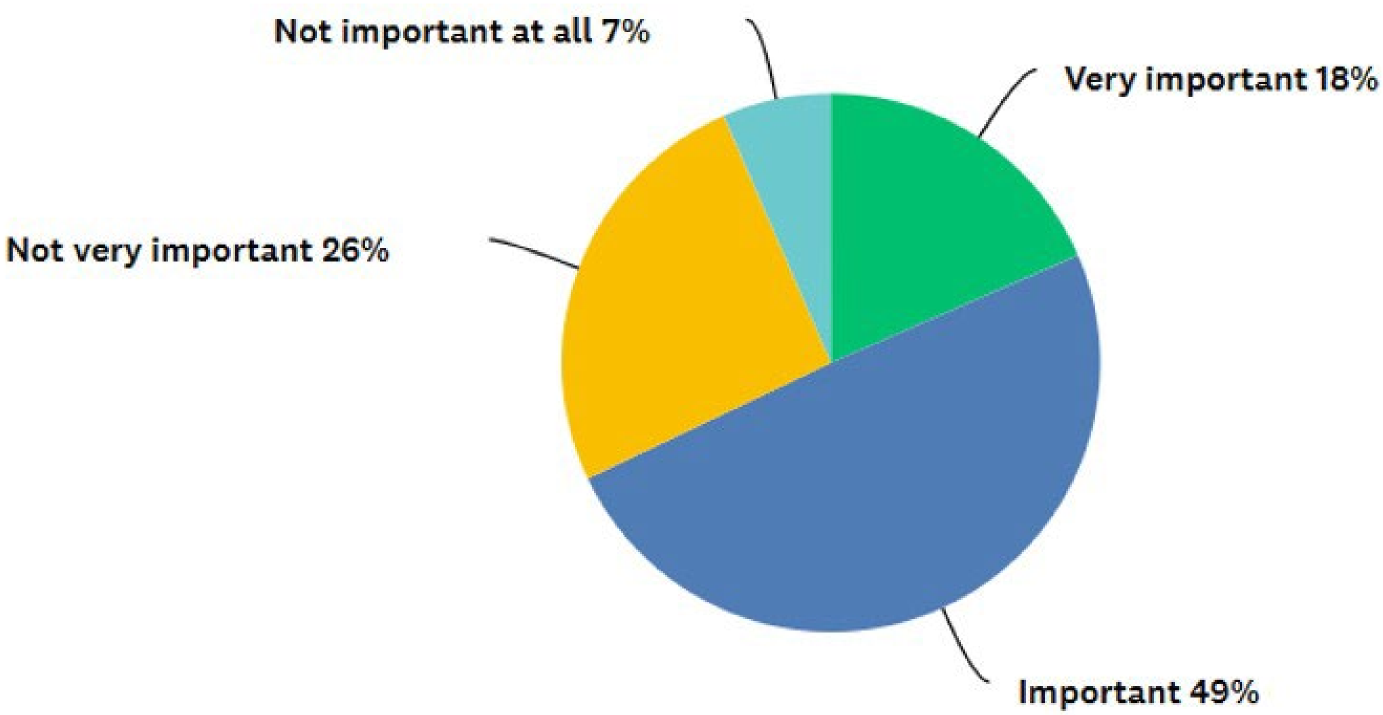
Source: BPM Partners 2025 BPM Pulse Survey

Rated on a 1 - 5 importance scale, with 5 being most important, these are the highest rated budgeting and planning solution capabilities. Ease of use and performance and scalability top the list as usual. A major change though is driver-based planning which has jumped up the list from being rated the 8th most important capability last year. This is evidence of more people relying on modeling as the primary method of generating forecasts, as opposed to direct entry which has long been the top approach. Finance self-sufficiency remains in the top 5 most important features to look for. Integration with real-time actuals is new to this top page of the key features list this year. It goes hand-in-hand with continuous forecasting (forecasting as often as needed) which requires the latest period-to-date actuals.

Source: BPM Partners 2025 BPM Pulse Survey

The first thing that should jump out at you from this merged graphic is that 98% of organizations are now including at least one element of operational planning in their FP&A projects. This is the highest this percentage has ever been. Which operational areas companies focus on varies somewhat by industry and company size, but really is driven by current pain points and priorities. Revenue planning tops the list again this year, followed by workforce planning which ensures the right resources are in place to achieve the revenue targets. Profitability analysis continues to round out the top 3 focus areas which can help guide investments to areas of greatest potential return. Financial and operational signaling, next on the list, allows companies to track leading operational indicators that can flag potential issues before they impact financial results.

Importance of Prebuilt Solutions for Financial/Operational Planning

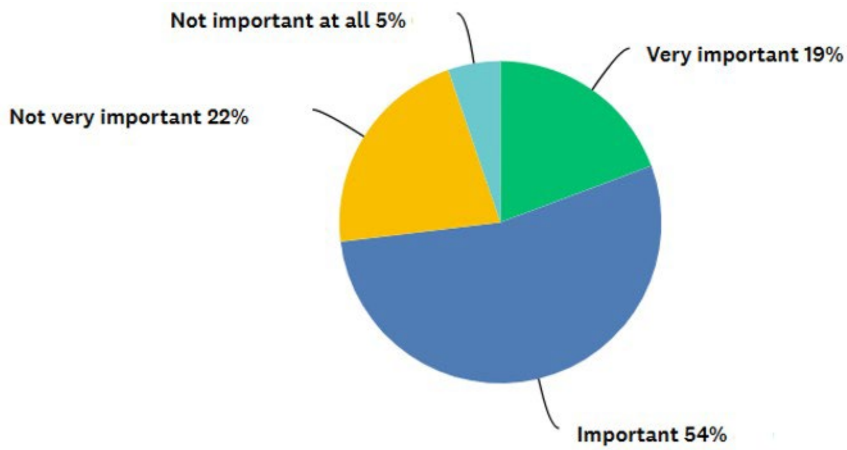


Source: BPM Partners 2025 BPM Pulse Survey

There is a significant change taking place in vendor offerings, particularly when it comes to operational planning. For years vendors have delivered flexible, extensible platforms with some out of the box content (usually financial) and tools to build the rest yourself (usually operational). Now the vendors are responding to what the market is looking for today: more prepackaged out of the box capabilities that are configurable to address their unique needs. This leads to faster, lower cost implementations, reduced time to payback, and better customer support because companies are utilizing less in-house developed custom solutions. The fact that 67% of survey respondents deemed this important or very important justifies the investment vendors are making in this area.

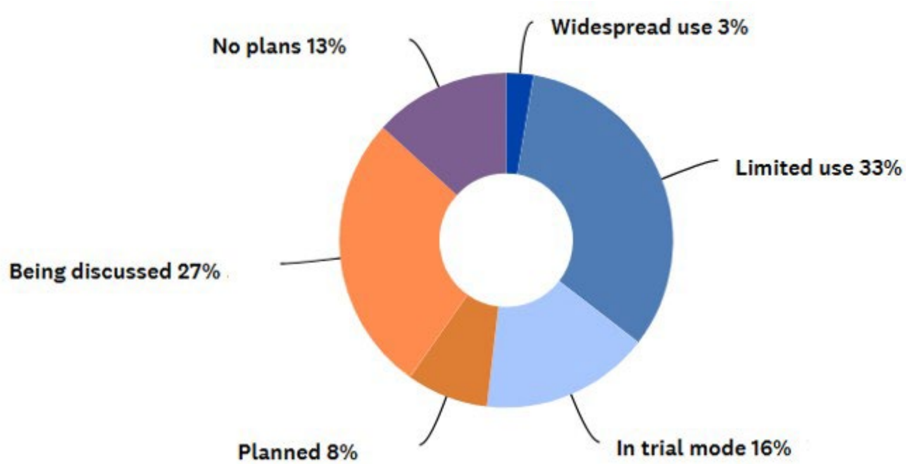
How these solutions are delivered varies by operational area and vendor. Some are just templates/models/frameworks downloaded from a marketplace. Others are capabilities added to the core product to address specific extended use cases. The focus today though is on vendors delivering specialized pre-configured solutions or applications, or third-party products built for their platform. The best of these address the intersection of an operational use case and a particular industry. While it is beyond the scope of this Guide, our free Vendor Snapshot reports highlight how each of the Core Vendors delivers various operational capabilities.

Importance of AI in CPM



Source: BPM Partners 2025 BPM Pulse Survey

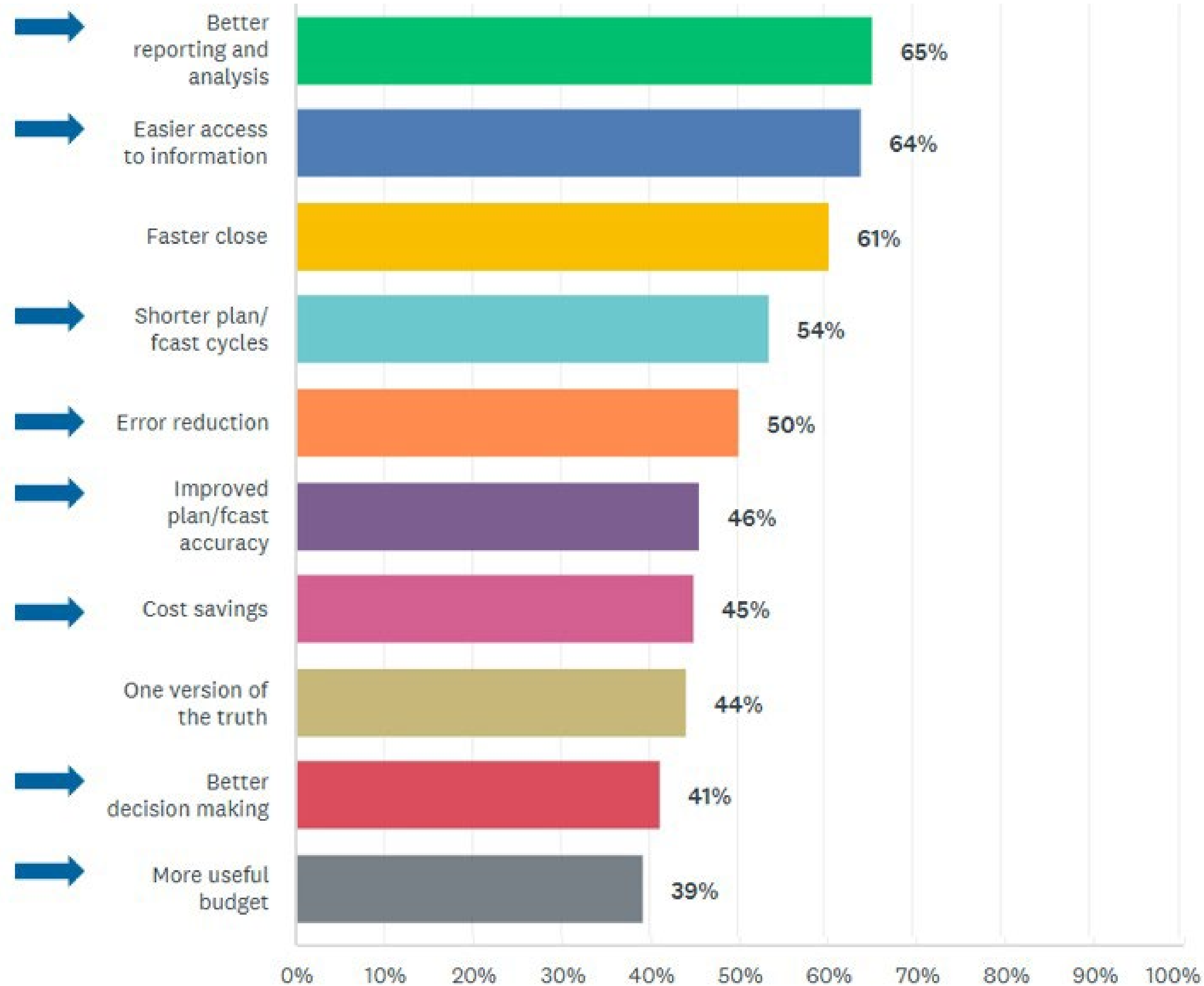
Status of AI Adoption in CPM



Source: BPM Partners 2025 BPM Pulse Survey

These two graphs represent our AI reality check. When you hear people talk about AI use in Finance you either hear a lot of hype, or a lot of doom and gloom. As is often the case, the truth is somewhere in between. The top chart paints a promising picture for AI: 73% think it's important or very important to have AI capabilities in CPM solutions. This is a dramatic change from just a year or two ago when AI was not top of mind in most CPM solution evaluations. Today it appears in almost every one of our vendor selection projects, and it's usually the senior stakeholders, such as the CFO and CIO, that are most interested. The bottom chart on the surface paints a more concerning picture. While we can say 52% are actively doing something with AI, and 35% are thinking about it, why is it that only 3% are reporting widespread use? There are a couple of very good reasons for that: 1) many companies do not yet have the solid data foundation required to get the most out of AI, 2) while the technology changes are coming quickly, organizations do not move as quickly (recall the long adoption curve from on premises solutions to cloud-based), and 3) we are still in the early adopter phase, mainstream adoption will happen when there is a track record of AI success and vendors can point to numerous references with quantifiable improvements in accuracy and productivity.

Benefits Received: Planning and Analysis Solutions



Source: BPM Partners 2025 BPM Pulse Survey

The above chart contains data collected from users of many of the solutions listed in this Guide. We have highlighted the benefits that relate to planning and analysis and will cover those that relate to consolidation, close, and reporting in that Guide. It's good to see that the specific benefits reported are in line with the reasons these solutions were implemented in the first place. 'Improving management reporting' always tops the list of what drives companies to seek out a new performance management solution, and the top benefit highlighted here would indicate that goal was achieved by the majority of organizations in the survey. It's also encouraging that more companies this year are also reporting 'better decision making' as a benefit they received. Just about any of these benefits is a good reason to implement a modern, AI-powered performance management solution.

General Planning and Analysis Solution Requirements

BPM Partners Recommends

Easy to Use

- Intuitive, minimal training
- Supports many users/roles across the organization
- Finance self-sufficiency
- Workflow
- Collaboration

Cloud-based

- Fast implementation and rollout
- Access from anywhere
- Facilitates collaboration
- Frequent enhancements
- Always latest version

Rich Functionality

- Powerful modeling (driver-based, scenario, predictive)
- Financial intelligence
- Operational planning: Workforce, Revenue, Sales, Supply Chain
- Fast, dynamic reporting

Technology/Architecture

- Performance and scalability
- Leverages AI (data quality, automation, predictive, generative)
- Integrated BI capabilities
- Streamlined source system integration
- Integrated solution with Consolidation

While your detailed list of requirements should focus on your unique business needs, this chart defines a recommended set of capabilities that any Budgeting and Planning solution you evaluate should have.

Easy to Use: This is key to ensure widespread adoption of the new planning solution. For many, familiarity equates to ease of use so a spreadsheet interface would be viewed as easy since many employees are already comfortable working in that environment. As planning extends beyond Finance into operational areas across the company collaboration and workflow capabilities become more critical. To achieve the self-service goal that many companies seek, the solution needs to be designed for business self-sufficiency (less reliance on IT for routine tasks).

Rich Functionality: The solution you select today must be able to support your company as it grows and its needs change. Look for a system that supports multiple modeling approaches, incorporates financial intelligence (understanding income/expense, asset/liability balance/flow, and leveraging that knowledge in calculations and reports), and offers flexible and responsive reporting. It must also offer support for detailed operational planning capabilities around revenue, workforce, sales, supply chain, and more. Even if you are focused on financial planning first, you need a solution that will allow you to expand into operational planning and analysis over time.

Cloud-based: Modern, cloud-based solutions are really the only way to go today. Benefits include little to no software to install, automatic updates to the latest version, multiple enhancement releases throughout the year, and ease of access from anywhere. The cloud-based approach also reduces hardware requirements, allows for system elasticity (scaling of resources up or down as needed), lessens demand for IT, simplifies adding a new user to the system, facilitates work from home, in office, and hybrid models, and makes support easier with everyone always on the latest version.

Technology/Architecture: The number of users on the system and the amount of data will grow over time. Make sure the system is highly scalable and designed to maximize performance and responsiveness. AI is now being adopted at an increasing pace and new capabilities are being rolled out on a regular basis. Even if you don't see the value yet, seek out a solution that has at least started to offer AI functionality. Elements of financial consolidation are important for budgeting and planning (to provide the actuals for management reporting for example), so consider planning solutions that are integrated or unified with financial consolidation solutions.

The Core Vendors

The BPM Partners Core Vendors for Planning and Analysis are your best choice for selecting successful, proven, and trustworthy vendors for your evaluation shortlist. They have met the following criteria:

- BPM Pulse Customer Satisfaction Rating of Good, Very Good, Excellent, or Outstanding for Budgeting and Planning Functionality (3.6 or better out of 5)
- Positive BPM Partners Analyst Assessment of Management Team, Product Roadmap, Strategic Direction, Growth Rates, Customer Retention, Employee Retention
- Positive BPM Partners Field Consulting Assessment of Ease of Doing Business, Accuracy of Product Representation, Responsiveness to Prospect Requests

Key to Core Vendor Chart

Solution Summary – description of the vendor's planning and analysis offerings, highlighting the main components and unique elements

Target Customer – company size (by revenue) that the vendor primarily sells and markets to, vertical focus if applicable

Selected Strengths – five defining attributes of the vendor's solution, as determined by BPM Partners based on its annually updated list of twenty possible choices; vendor input (where provided) is taken into account

AI (Artificial Intelligence) – indicates whether a vendor has implemented AI capabilities platform-wide or selectively, and which forms of AI are included: Machine Learning (ML), Generative AI (GenAI), and agentic AI

Learn More: Info – this hyperlink takes you to a BPM Partners curated page for that vendor containing a further description of their offering, their overall BPM Pulse rating, links to analyst reports, latest news, other vendor-related content

Learn More: Details – this hyperlink allows you to request a custom report comparing any two vendors that includes detailed write-ups, feature checkboxes, all sixteen BPM Pulse attribute ratings, referenceability ratings, and typical price ranges

Learn More: FCCR Guide – this hyperlink brings up our latest Buyers Guide for AI-Powered Financial Consolidation, Close, and Reporting Solutions containing ratings and details for each vendor's financial consolidation, close, and reporting capabilities (only vendors displaying this link are included in the FCCR Guide)

The Core Planning and Analysis Vendors (A-D)

Vendor	Solution Summary	Target Customer	Selected Strengths	AI	Learn More
Anaplan	The Anaplan AI-infused Scenario Planning, Analysis and Reporting Platform delivers a unified and extensible solution for connected planning, uniquely aligning financial plans and targets to operational plans and models of execution for collaboration, consistency, accuracy, and optimized decision-making across the enterprise. Core solution areas include Finance planning, Sales & Marketing focused on Go-to-Market planning, Supply Chain planning, and HR & Workforce planning.	Upper Midmarket to Enterprise	*Product Flexibility* *Quick Implementation* *Out of the Box Functionality* *AI Powered* *Connected Planning*	Platform: *Anaplan Intelligence* ML GenAI agentic AI	Info Details FCCR Guide
Centage	Centage is a unified and collaborative budgeting and forecasting solution for finance teams in small to midsize businesses. The solution offers integrated budgeting, predictive planning and forecasting, simple aggregation, reporting and analytics, along with robust modeling, what if, and scenario planning tools. It features unlimited dimensions, multi-step allocations, and support for transactional level details. All supported by centralized permissions-based workflow.	Small to Midmarket	*Product Flexibility* *No Coding* *Low Total Cost of Ownership* *Collaboration* *Out of the Box Functionality*	Selective ML GenAI	Info Details
deFacto	deFacto is a unified, AI-enabled Integrated Business Planning platform that enables mid-market to large enterprises to optimize overall business performance by synchronizing planning and decision-making across every functional area. The application library includes FP&A, HR, S&OP, Demand Planning, Tax, Supply Chain, CapEx, and Project Planning. deFacto extends full write-back and planning capabilities to Excel and Power BI.	Midmarket to Large	*Product Flexibility* *Low Total Cost of Ownership* *Complexity Simplification* *Performance/ Scalability* *IBP*	Platform: *deFacto AI* ML GenAI	Info Details

The Core Planning and Analysis Vendors (J-On)

Vendor	Solution Summary	Target Customer	Selected Strengths	AI	Learn More
JustPerform *(insightsoftware)*	JustPerform from insightsoftware delivers a unified platform with a process-first approach, intuitive user experience, and strong governance capabilities. It is designed to be an all-in-one financial performance companion and supports a range of use cases: Extended Planning and Analysis unites Finance, Sales, Supply Chain, HR and Marketing processes, Profitability Analysis – delivers granular analysis across products, projects, customers, and channels.	Upper Midmarket to Enterprise	*No Coding* *Complexity Simplification* *Performance/ Scalability* *Complete Consolidation* *Integrated Planning*	Platform: *Lineos* ML GenAI	Info Details FCCR Guide
Lumel	Lumel brings Enterprise Performance Management to Power BI data models as a native app with Fabric. Lumel offers a full stack EPM suite consisting of Planning, Data apps, Data Management and Modern BI (Reporting, Exploration and Visualization). With pre-built components, Lumel enables rapid deployment of budgeting, forecasting, FP&A modeling, sales and operational planning, scenario management, and driver-based planning with fully integrated reporting, analytics, and data storytelling. .	Upper Midmarket to Enterprise	*Intuitive* *No Coding* *Quick Implementation* *Easy Expandability* *Integrated Planning*	Varies by Data Platform	Info Details
OneStream	OneStream's unified, AI-powered, and extensible finance platform includes solutions for financial planning and analysis with strategic planning, rolling forecasts, and scenario modeling, and operational planning and analysis with demand forecasting, workforce planning, and InfinitySPM for full-featured sales performance management. CPM Express is a pre-built configurable application for rapid deployment. The OneStream Solution Exchange offers a wide range of downloadable solutions.	Upper Midmarket to Enterprise	*Performance/ Scalability* *Financial Intelligence* *Complete Consolidation* *Unified Planning* *Platform Products*	Platform: *SensibleAI™* ML GenAI agentic AI	Info Details FCCR Guide

The Core Planning and Analysis Vendors (Or-Pl)

Vendor	Solution Summary	Target Customer	Selected Strengths	AI	Learn More
Oracle	Oracle Cloud EPM is modular, connected, and comprehensive. Planning & Analysis offerings include Enterprise Planning and Budgeting with integrated strategic modeling, Profitability and Cost Management, and Enterprise Performance Reporting. Oracle Strategic Workforce Planning enables HR and Finance to manage skills, gaps, and costs. Oracle Sales Planning Cloud supports quota and commission, territory modeling, and advanced forecasting. Also available are configurable solutions for IBP.	Upper Midmarket to Enterprise	*Performance/ Scalability* *Easy Expandability* *Integrated Planning* *AI Powered* *Partner Ecosystem*	Platform: *OCI AI* ML GenAI agentic AI	Info Details FCCR Guide
Pigment	Pigment's AI business planning and performance management platform is modeling-centric and can support most financial and operational planning requirements. It combines the flexibility of a fully customizable platform with use-case specific solutions that leverage best practices and include their own organization charts, templates, and reports. Current solutions include revenue planning, one-click what-if scenario planning, workforce planning, sales planning, carbon accounting, and supply chain planning.	Upper Midmarket to Enterprise	*Intuitive* *Product Flexibility* *Low TCO* *Performance/ Scalability* *Unified Planning*	Platform: *Pigment AI* ML GenAI agentic AI	Info Details
Planful	The Planful Platform is a unified solution for Financial Performance Management, combining purpose-built applications with embedded AI to help finance, accounting, and business teams collaborate, automate, and accelerate planning, budgeting, reporting, and analytics. The Budget Manager Experience provides a role-based interface for users outside of Finance. A Power BI connector provides live access to Planful data and a native Snowflake connector syncs Planful data in real-time.	Midmarket To Large	*No Coding* *Quick Implementation* *Out of the Box Functionality* *Complexity Simplification* *IBP*	Platform: *Planful AI* ML GenAI agentic AI	Info Details FCCR Guide

The Core Planning and Analysis Vendors (Pr-U)

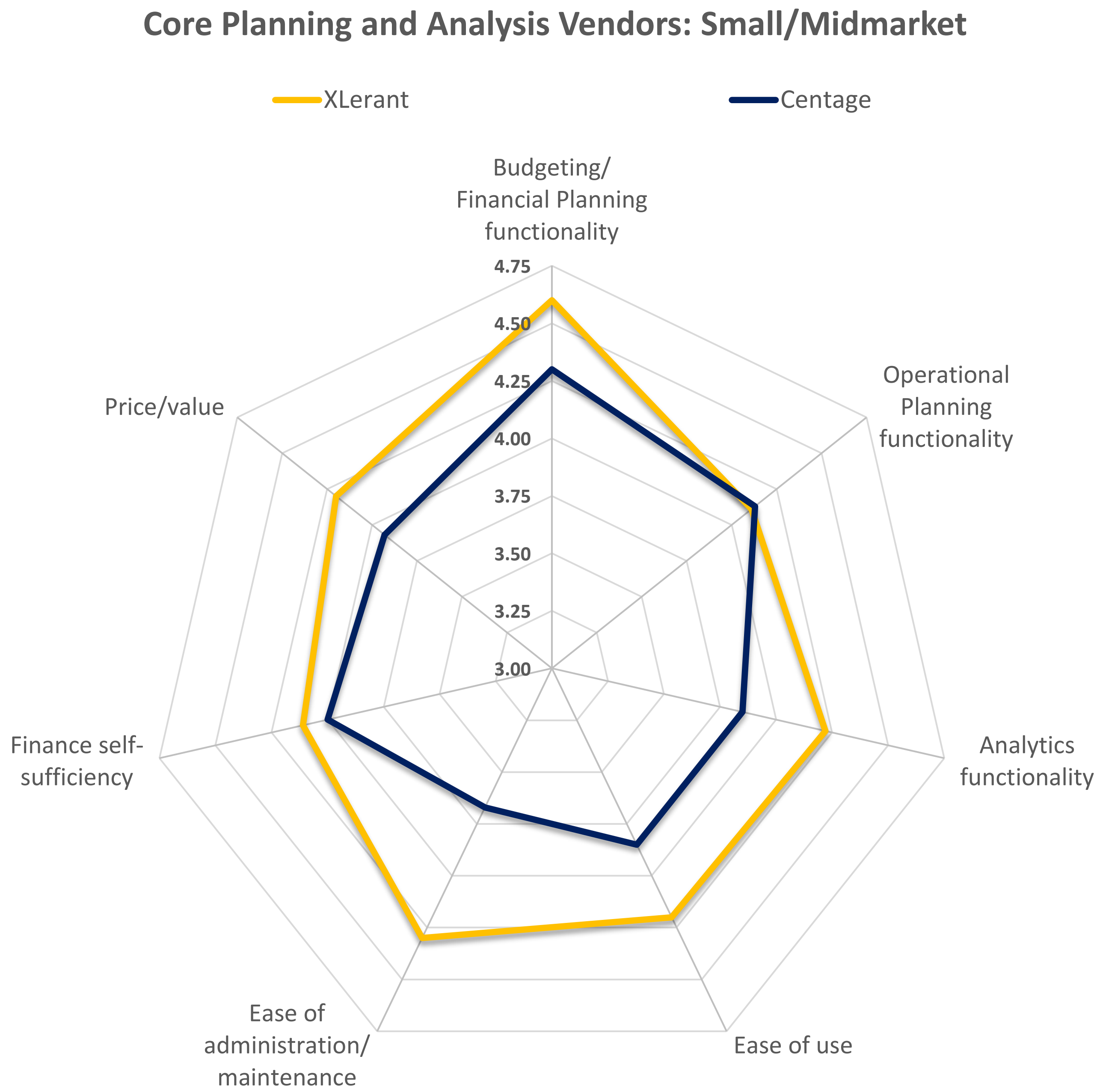
Vendor	Solution Summary	Target Customer	Selected Strengths	AI	Learn More
Prophix	Prophix One™ is a Financial Performance platform for the Office of the CFO in midmarket organizations that delivers best-of-breed solutions for Accounting & Compliance, Financial Planning & Analysis, and Reporting & Analytics, delivered through a single point of entry with a centralized data model. Additional capabilities include integrated business planning. Prophix One FP&A Plus handles the greater complexity and granularity needed for operational planning.	Midmarket to Large	*Intuitive* *Product Flexibility* *No Coding* *AI Powered* *Integrated Business Planning*	Platform: *Prophix One Intelligence* ML GenAI agentic AI	Info Details FCCR Guide
SAP	SAP Analytics Cloud is a unified solution that brings together planning, business intelligence, analytics, and AI in a single, integrated environment designed for data exploration and storytelling. The solution is extensible and addresses multiple use cases and industries supported by a range of pre-built content packages and templates, as well as the ability for users to create their own custom applications and visualizations.	Upper Midmarket to Enterprise	*Intuitive* *Pre-configured Solutions* *Integrated Planning* *Complexity Simplification* *AI Powered*	Platform: *SAP Business AI* ML GenAI agentic AI	Info Details
Unit4	Unit4 FP&A is a flexible, no code/low code platform for planning and analytics designed to connect operations and strategy. It provides a full range of integrated performance management capabilities powered by AI for budgeting, planning (financial, sales, HR, project, risk), forecasting, profitability analysis, and financial reporting. Workforce Planning with analytics complements salary planning with an operational focus.	Midmarket to Large: *Higher Education, Not for Profit, Professional Services, Public Sector*	*Product Flexibility* *Out of the Box Functionality* *Performance/ Scalability* *Integrated Planning* *Vertical Content*	Platform: *: Unit4 AI for Business Solutions* ML GenAI agentic AI	Info Details FCCR Guide

The Core Planning and Analysis Vendors (V-X)

Vendor	Solution Summary	Target Customer	Selected Strengths	AI	Learn More
Vena	The Vena AI-Powered Complete FP&A Platform, natively integrated and synchronized with Microsoft 365, streamlines financial and operational planning. Vena's platform combines Microsoft Excel and 365 with the control and scale of its centralized in-memory Vena CubeFLEX™ database and collaborative workflows. Vena addresses the full spectrum of financial planning and forecasting, and extended planning including revenue and sales planning. .	Midmarket to Large	*Intuitive* *Product Flexibility* *Low Total Cost of Ownership* *AI Powered* *Integrated Business Planning*	Platform: *Vena AI* ML GenAI agentic AI	Info Details FCCR Guide
Wolters Kluwer CCH Tagetik	The AI-powered CCH® Tagetik Intelligent Platform, available in standard or SAP HANA versions, is a unified platform that consists of intelligent solutions including CCH Tagetik Budgeting, Planning, and Forecasting, Cash Flow Planning, Capital Expenses Planning, Workforce Planning, Integrated Business Planning, Integrated Business Planning for CPG, Production Cost Planning and Control, and Supply Chain Planning (with solutions for demand, trade promotions, supply, and production planning).	Upper Midmarket to Enterprise	*Product Flexibility* *Complexity Simplification* *AI Powered* *Complete Consolidation* *Integrated Business Planning*	Platform: *CCH® Tagetik Intelligent Platform* ML GenAI agentic AI	Info Details FCCR Guide
XLerant	XLerant's BudgetPak is focused on collaborative budgeting using zero-based or incremental approaches, forecasting, and management reporting. An Excel add-in provides custom reporting capabilities with dynamic integration to the database. The full set of capabilities includes annual and hourly salary planning with detailed benefits planning, scenario modeling, and long-term projections using predictive capabilities.	Small to Midmarket	*Intuitive* *Low Total Cost of Ownership* *Complexity Simplification* *Product Flexibility* *Collaboration*	Selective ML	Info Details

The Core Planning and Analysis Vendors Customer Ratings: Small/Midmarket

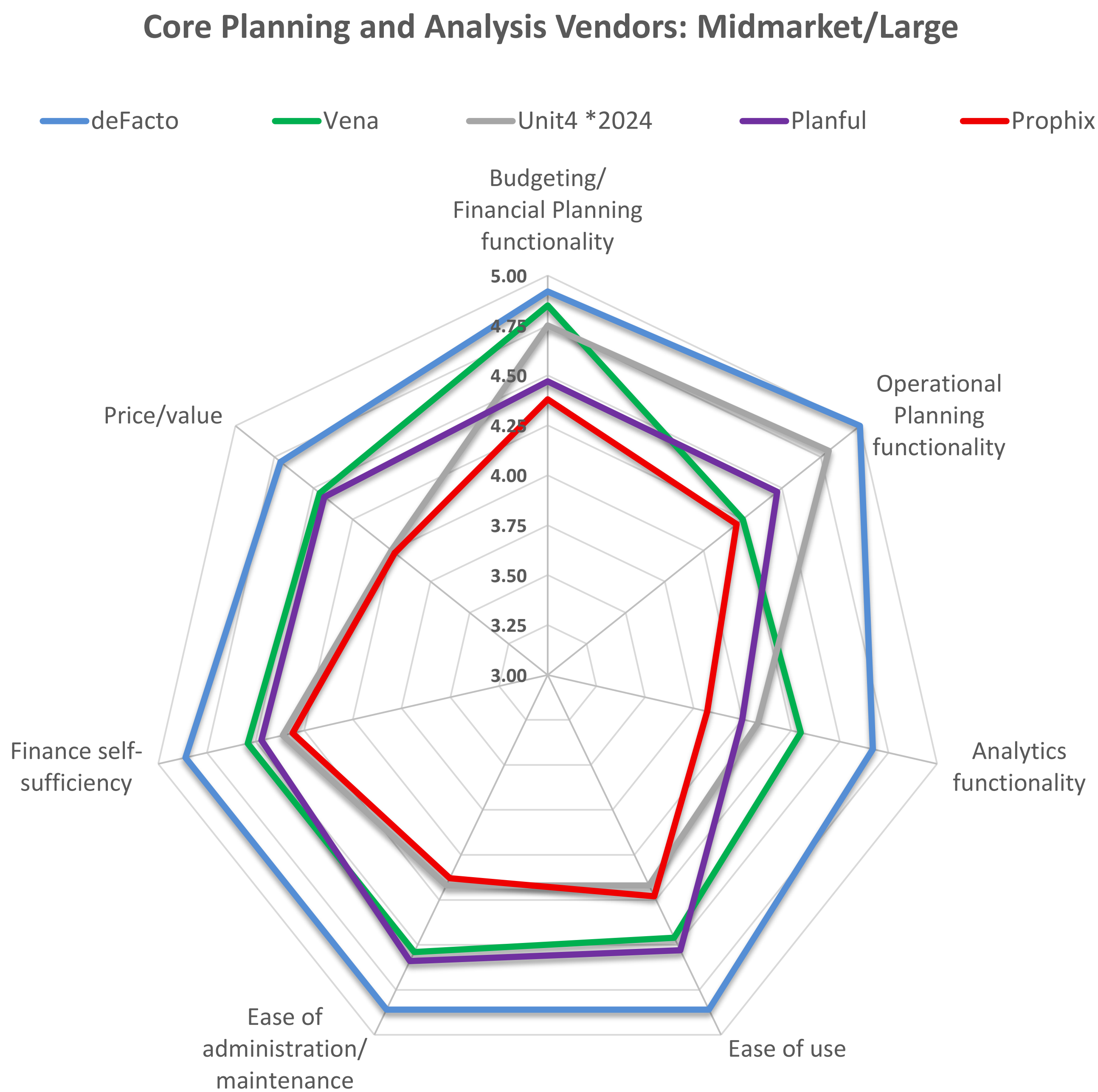
This chart compares key customer satisfaction ratings related to budgeting and planning for the Core Vendors primarily targeting the small and/or midmarket market segments.



Source: BPM Partners 2025 BPM Pulse Survey

The Core Planning and Analysis Vendors Customer Ratings: Midmarket/Large

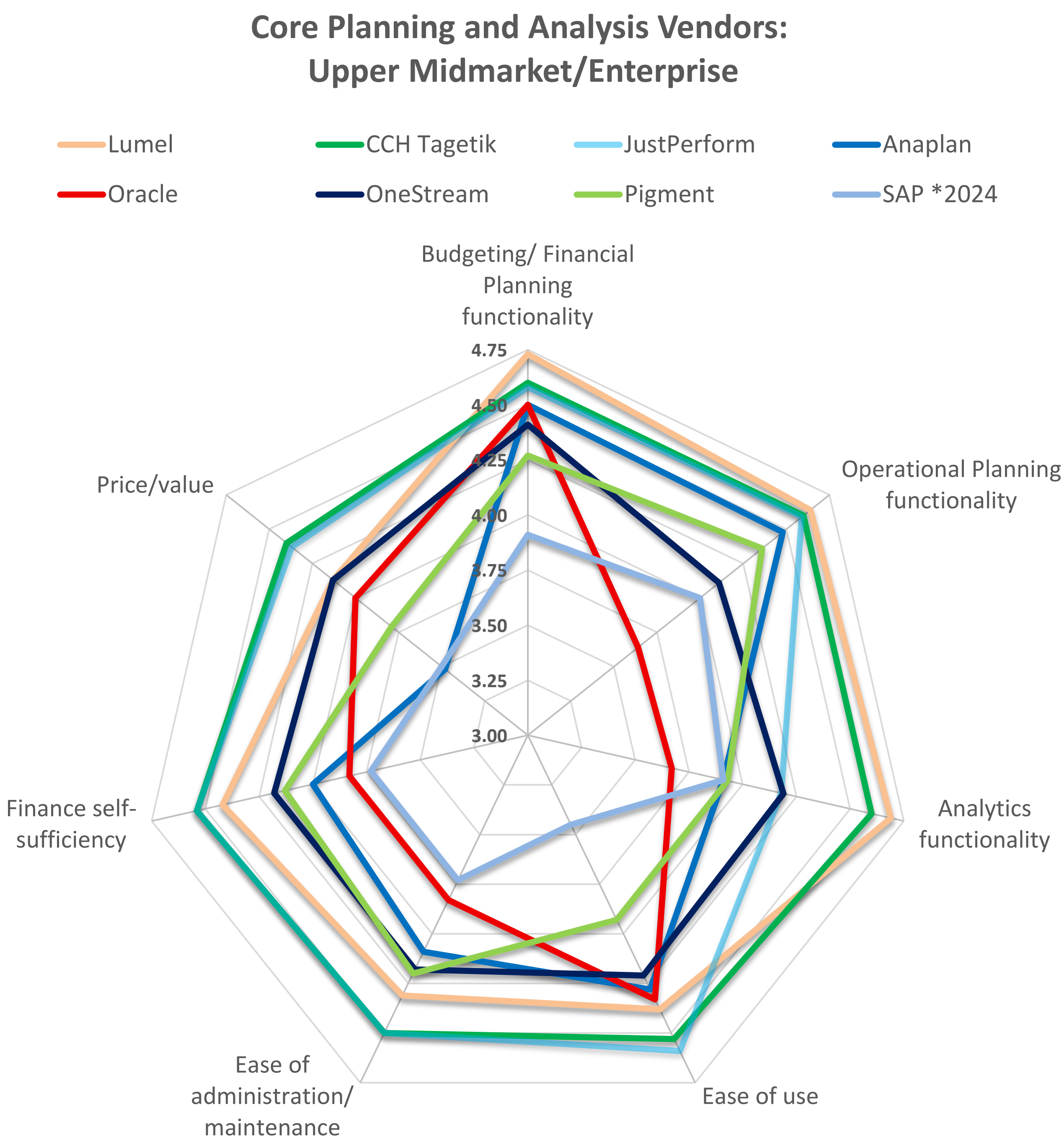
This chart compares key customer satisfaction ratings related to budgeting and planning for the Core Vendors primarily targeting the midmarket/upper midmarket/large market segments.



Source: BPM Partners 2024/2025 BPM Pulse Surveys

The Core Planning and Analysis Vendors Customer Ratings: Upper Midmarket/Enterprise

This chart compares key customer satisfaction ratings related to budgeting and planning for the Core Vendors primarily targeting the upper midmarket/large/enterprise market segments.



Source: BPM Partners 2024/2025 BPM Pulse Surveys

Additional Vendors

The following vendors have been evaluated by our team, but sufficient information was not available for us to determine if they met BPM Partners Core Vendor criteria. While this may increase the risk somewhat, it is still likely you will find additional vendors that fit your requirements on this list. If you decide to include them in your evaluation you will need to allow extra time for a more through due diligence process:

- The reason newer vendors are on this list instead of the Core Vendor table:
  - there is limited feedback from analysts and customers to confirm their product capabilities and market success
- The reason established vendors are on this list instead of the Core Vendor table:
  - they have not provided the required information to our analysts and/or not enough of their customers participated in our annual BPM Pulse customer satisfaction survey

Additional Planning and Analysis Vendors to Consider

Board – an Enterprise Planning Platform for financial and operational planning, consolidation and close, analytics, and AI, for large enterprises Info

IBM – IBM Planning Analytics is designed for integrated and extensible planning and offers a unified set of capabilities for budgeting, planning, forecasting, analysis and reporting for financial as well as operational data and supports a full-featured Excel interface Info

InfinitySPM – integrated sales performance management, sales operations, and incentive management solution built on the OneStream platform

Jedox – planning, analytics, consolidation, and BI with Excel, web, and mobile UIs for midmarket to large organizations

Una Software – this performance planning platform is an AI-powered FP&A solution delivering dynamic budgeting, planning, and forecasting with a focus on connected revenue planning supporting direct CRM integration and predictive forecasting of revenue or bookings, and integration into the core financial plans Info, Details

Workday Adaptive Planning – a fully-integrated suite of applications for budgeting, planning, forecasting, reporting and analysis for companies of all sizes Info

The Vendor Selection Process

In prior sections of this Guide we have given you some ideas to think about in terms of your requirements, as well as an overview of some of the best vendors available to meet those requirements. This is where it all comes together. How do you finalize your requirements and make sure you choose the best vendor for your unique needs? In this section we share some general guidance.

- This solution is part of a high visibility, mission critical front office system that the company will rely on to make key decisions. You don't want to be stuck with a sub-optimal choice for the 8 - 10 years (or longer) that these systems typically remain in place. That is why it is essential to go through a formal evaluation process.

- The starting point for any performance management vendor selection project is to identify an executive sponsor. They should be a senior executive with the authority to make decisions for the team. Among other tasks, they will need to do the following:

    - Create a vision that considers the full potential of performance management and doesn't limit the focus to a current pain point

    - Initiate and enable change, to prepare the company for revised processes, new roles and responsibilities, the transition to a new system

    - Make the tough decisions as there will be trade-offs that have to be made

- To get the necessary buy-in and adoption required to make this initiative a success you will need to assemble a cross-functional team of key stakeholders from Finance, IT, and operations. They will need to be actively involved throughout the process. For a planning-focused project the VP or Director of FP&A should have a leading role, business unit heads, operational managers (minimally from sales and HR), as well as regional managers need to be on the evaluation team, and of course the CFO needs to be involved. It is also wise to include the controller since management reporting relies on the actuals coming from the consolidation solution.

- Some organizations may also be required to go through an RFP process.

For step-by-step guidance to ensure you get the right product, at the best price, while minimizing risk and maximizing buy-in and adoption:

[BPM Partners Vendor Selection Best Practices eBook]

About BPM Partners

BPM Partners is the leading independent authority on business performance management (BPM/CPM/EPM) and related business intelligence solutions and has been recognized by Forbes as one of America's Best Management Consulting Firms. The company helps organizations address their budgeting, planning, financial consolidation, close and reporting, regulatory compliance, profitability optimization, key performance indicator (KPI) development, and operational performance challenges. Vendor-neutral experts guide companies through their BPM initiatives from start to finish while both minimizing risk and costs, and maximizing buy-in and adoption. For further details, go to https://www.bpmpartners.com/. Follow BPM Partners on Twitter @BPMTeam and LinkedIn BPM Partners | LinkedIn.

Questions? For questions about this guide, or any of the covered vendors: speak with one of our experts

New and updated guides in this series will be made available here.

Vendor-Supplied Content Follows:
Case Studies, Data Sheets, and More

Wolters Kluwer

CCH® Tagetik

Meet CCH® Tagetik

Corporate Performance Management powered by Expert AI

Innovation fit for Finance

CCH Tagetik is the CPM award-winning provider of leading-edge financial planning, world-class consolidation, and trusted regulatory solutions.

With embedded Expert AI, the CCH Tagetik Intelligent Platform uses a powerful combination of agentic AI, machine learning, and predictive analytics to empower finance teams to lead with intelligence, plan with confidence, and anticipate what's next.

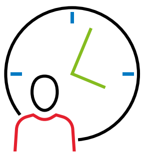
- Financial Close and Consolidation
- Financial and Operational Planning and Analysis
- ESG & Sustainability Performance Management
- Corporate Tax
- Regulatory Reporting
- Intelligent Disclosure

Make better decisions faster with **CCH® Tagetik Budgeting, Planning, and Forecasting software**

New products, promotions, seasonality, inflation, competition — no matter what you're planning for or reacting to, CCH® Tagetik Budgeting, Planning, and Forecasting software, powered by our AI driven Intelligent Platform, provides you the resources to plan more accurately.

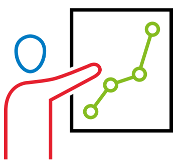
See the bigger picture by bringing unlimited dimensions of financial and operational information together. Align departments by housing all plans, planners, and performance data under one roof. Use AI-based predictive analytics, leverage insight driven dashboards to increase plan explain-ability. Do all this and more, faster than ever, by planning on our high-power data processing engine.

3 reasons why **CCH® Tagetik Budgeting, Planning & Forecasting software** let's you focus on your business



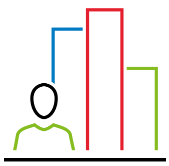
Increase Agility

Plan more frequently, quickly and accurately by leveraging Objective based AI. Assemble and prepare fragmented data more effectively. Enable intelligent platform report access to peers and management. Automate mundane tasks to increase planning efficiency



Align Resources

Integrated business planning provides deeper insights and better planning outcomes. AI tools help analyze financial and operational drivers in more detail and execute scenarios more precisely while predictive analytics and our Ask AI, workflow and collaboration tools ensure corporate and business unit resources are aligned.



Predict outcomes

Confidently plan baseline revenue and costs and evaluate alternatives using AI-based forecasting techniques. Transform billions of lines of raw data into trusted future projections to stay the course or execute new strategies.

Wolters Kluwer

CCH® Tagetik: CPM for Finance powered by Expert AI

Datasheet

"With Tagetik we now have a driver-based forecast that allows us to build a constructive discussion with the business mainly focused on those drivers. It's a better discussion that helps us build action plans based on this driver's best forecast - a game changer that is helping us drive better growth and performance."

Emmanuelle Mercier
VP Business FInance Transformation
Schneider Electric

"Our first predictive model delivered a **3% improvement in accuracy**, translating to roughly **$400,000** in gains over actuals from January to June 2025. Even more impressive, compared to the budget, accuracy improved by **27%.** These results prove that predictive analytics isn't just a buzzword—it's a game-changer for financial planning and decision-making."

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

Budgeting, Planning and Forecasting
Confidently plan baseline revenue and costs and evaluate alternatives using AI-based forecasting techniques.

Predictive Intelligence
Improve financial results with AI-based predictive planning & analytics software. Extend insights with more scenarios and deeper driver-based analysis.

Production Cost Planning and Control
Confidently plan production around realistic, profit-centered budgets. Manage zero based budgeting scenarios.

Integrated Business Planning
Break down planning barriers in a platform that unites financial and operational planning and budgeting.

Capital Expense Planning
Ensure your capital expenses meet your short-term needs and future growth objectives with this turnkey app.

Workforce Planning
Align workforce plans with strategic decision making geographically and across product lines.

Cashflow Planning
Manage risk and improve cash management with a solution built to help you optimize liquidity.

Supply Chain Planning
Build a resilient supply chain that embraces uncertainty with a solution that supports demand, supply, production, and inventory planning.

Connect with an expert

Get started with CCH® Tagetik. Talk with one of our experts to learn how our extended planning solutions can help you create cross-functional plans that set your whole enterprise up for success.

CCH® Tagetik is trusted by 2000+ leading companies across all industries

ArcelorMittal · MAHLE · SNCF · TOYOTA · LIEBHERR · BNP PARIBAS · uniper · VEOLIA · VINCI · Pernod Ricard · CIRRUS LOGIC

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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.

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Visit CCH® Tagetik website

CCH® Tagetik
by Wolters Kluwer