CCH® Tagetik

From periodic cycles to continuous planning

How PMI transforms FP&A with always-on forecasting, agentic AI, and a connected AI ecosystem on CCH® Tagetik

Company
Philip Morris International (PMI)

Industry
Consumer Packaged Goods (CPG)

CCH Tagetik use
- Revenue planning
- Cost planning
- Balance sheet planning
- Capital expenditure (CapEx) planning
- Workforce planning
- Forecasting
- Performance reporting
- Integrated business planning processes

By the numbers
- 85,000+ employees
- 108 markets
- 50 affiliates
- 300,000+ farmers in its extended ecosystem
- 6+ years as a CCH Tagetik customer

Customer perspective

"CCH Tagetik is a centralized finance solution where planning and forecasting come together in one system. We have better data, better processes, and stronger collaboration."

Catarina Gonçalves
Senior IT Solution Expert Finance, PMI

"Full P&L visibility. Real time. That's the ambition in motion."

Marcus Gassner
Global Process Owner, Planning, Budgeting, Forecasting & Reporting, PMI

The challenge

As PMI transformed from a single-category business into a multi-category organization, Finance faced a growing level of complexity. Planning processes were decentralized across markets, data resided across multiple systems, and existing tools were not designed to support rapid business change. The company needed a more connected and scalable Finance foundation that could evolve alongside the business.

Key challenges included:

- Increasing forecasting complexity across global markets
- Disconnected planning activities and local tools
- Dependence on ERP, BI, and data platforms
- Limited process standardization
- Need to support ongoing business transformation
- Desire to create a foundation for enterprise AI initiatives

The solution

PMI selected CCH Tagetik as a unified platform for planning, forecasting, and reporting, creating a single source of truth across Finance.
The company leveraged CCH Tagetik's flexible data model and native connectivity to support both global governance and local business requirements. Over time, PMI expanded the platform to support revenue, cost, balance sheet, workforce, and capital planning processes while enabling stronger collaboration between Finance and IT.

At the same time, PMI began building the foundation for AI-powered Finance, focusing on:

- Personal productivity
- AI-enhanced finance processes
- Predictive intelligence for forecasting
- Digital coworker initiatives spanning multiple systems and workflows

The results

- **Unified planning, forecasting, and reporting environment**
- **One platform for revenue, cost, CapEx, workforce & IBP**
- **One number, one forecast across Finance, Supply Chain & Commercial**
- **Improved visibility into financial performance**
- **Greater process standardization and governance**
- **Flexible data model supporting global and local requirements**
- **Strong connectivity across enterprise systems**
- **Foundation for enterprise-scale AI adoption, agentic AI orchestration and digital workers connected via MCP**
- **Full P&L visibility in real time — the ambition, in motion.**
- **AI Factory with 8 core capabilities — 80% reusable across use cases.**

Why PMI chose CCH Tagetik

According to PMI, the combination of a trusted Finance platform, flexible data model, powerful connectivity, and a collaborative partnership has enabled the company to continuously evolve its Finance operating model while preparing for the future of AI.
PMI describes CCH Tagetik in three words: Reliability. Collaboration. Innovation.

Discover how CCH Tagetik can help you scale AI and unify your global Finance operations.

Watch the Philip Morris International video testimonial →