

# Tidemark Financial Planning

## Business Challenge

What does your financial planning process look like? Is it a collaborative, continuous planning environment fed by always-current data?

More than likely, it's not. In fact, most companies handle this function as an ad-hoc process. With planning driven by a few power users in finance, corporate financial plans rarely integrate with line of business plans, and collaboration consists of endless emails and error-prone spreadsheet consolidation.

Most businesses can't modernize their financial planning processes because they're limited by legacy planning systems or spreadsheets. Collaboration is difficult because legacy systems are hard to use, and spreadsheets are cumbersome and rely on manual data entry and iteration. Decision-makers lack real business perspective because dimensions defined in premise-based platforms can't scale. And because they were architected before the age of Big Data, virtually no legacy platforms are built to leverage unstructured external information – from social networks, point-of-sale sensors and more – that adds useful context to core performance metrics.

## The Tidemark Solution – Bring Process, Collaboration and Prediction to Financial Planning

Tidemark Financial Planning helps you overcome the limitations of legacy solutions with a planning application built for a real-time world. With Tidemark, you'll be able to infuse modern capabilities into your financial planning processes, including structured and context-aware collaboration, the ability to drill down to line-item details from anywhere, and accurate what-if scenario modeling with advanced predictive analysis. Tidemark Financial Planning is packed with features you won't find in legacy solutions: an array of preconfigured (yet customizable) processes, flexible business dimensions, extensive metrics, and advanced analytics. Rely on Tidemark to:

- Create budgets, forecasts and plans around your processes for revenue, expenses, capital expenditures and strategic initiatives

## Integrate with Financial, Operational, and Transactional Data

With Tidemark, you can leverage transactions from leading workforce and financial management systems to create detailed budgets, forecasts, and plans.

Tidemark Financial Planning connects to financial, operational, and transactional systems, as well as social and mobile systems. Through alliances and integrations with SnapLogic and Workday, Tidemark can import data from cloud and on-premise financial management, ERP, CRM and sales systems. Use this integrated data to improve the accuracy of plans, and then enhance them with social, mobile, and other Big Data to develop predictive cost budgets and revenue forecasts.

Learn more at [tidemark.com/snaplogic](http://tidemark.com/snaplogic) and [tidemark.com/workday](http://tidemark.com/workday).



- Analyze your financial performance and identify the factors that drive it
- Model exploratory “what-if” scenarios
- Incorporate predictive analytics to develop forward-looking forecasts
- Leverage operational, transactional and Big Data sources for new planning elements
- Collaborate with LOB managers for truly integrated planning
- Use visual narratives to extend performance visibility and reports to all edges of the enterprise

## Tidemark Financial Planning – Budgeting, Forecasting, and Planning for Modern Finance

With Tidemark, you can eliminate surprises, mitigate risk, and anticipate where and when your business will need to pivot by feeding real-time plans that incorporate data to decision makers at a moment’s notice. Give business managers a predictive planning environment by equipping them with a baseline for planning promotions, new hires, transfers and exits. And because no two companies are alike, we make it easy for you to adjust parameters to fit your unique organization.

Tidemark Financial Planning is packed with configured, flexible application processes for:

- **Revenue Planning**
  - Revenue Summary
  - Revenue Forecast
  - Sales Price, Units, Discounts
  - Cost of Sales
  - Gross Margin
- **Expense Planning**
  - Forecast Summary
  - Expense Drivers
  - CapEx
  - Variances
  - Allocations
- **Project Expense Planning**
  - Project Capital Plan
  - Projects Summary
  - Expense Drivers

- **Strategic Planning**
- **Analytics**
  - Performance Summary
  - Summary P&L’s
  - Detailed P&L’s
  - Product Analytics
- **Advanced Analytics**
  - Forecast Drivers
  - Sales Drivers
  - Predictive Correlations
  - Predictive Adjusted Forecast

## The Tidemark Advantage

With Tidemark Financial Planning, you’ll get a flexible, scalable baseline for revenue and expense planning needs, including configured yet customizable processes, dimensions, and analytics.

Deploy Tidemark Financial Planning to:

- **Engage more stakeholders in financial planning, budgeting and forecasting** – Rescue your organization from the restrictive limitations of hard-to-use enterprise platforms and the sluggish pace of manual spreadsheet updates. With Tidemark’s consumer-grade, built-for-mobile user experience, you can make financial planning a continuous process for managers and decision-makers throughout the enterprise.
- **Make better decisions based on accurate insights** – Eliminate guesswork from plans and forecasts by incorporating real-time data from more than 40 sources. Capture contextual information from emails, reports, collaborations, social media and other sources to gain a comprehensive view of the story behind the numbers.
- **Accelerate planning with time-saving collaboration** – Share updates and get feedback from stakeholders with a single tap. Track collaborative decisions made within the process for future reference and review.
- **No Additional Cost** – Tidemark Financial Planning, like all Tidemark applications, is included in the Tidemark Planning & Analytics Cloud standard subscription. There is no hardware or additional software required.

