

**Company:** CCH Tagetik, Lucca, Italy

**Nomination Submitted by:** Wolters Kluwer

**Company Description:** Wolters Kluwer's product CCH Tagetik provides connected financial and operational planning with financial close, consolidation, and regulatory reporting processes and supports unlimited dimensionality with an AI-based predictive planning solution with real-time analysis, modeling, and reporting, as well as data-enabled forecasts.

**Nomination Category:** Product & Service Categories - Business Technology Solutions

**Nomination Sub Category:** Financial Management Solution

**Nomination Title:** CCH Tagetik Intelligent Platform

1. Which will you submit for your nomination in this category, a video of up to five (5) minutes in length about the the nominated new or new-version product or service, OR written answers to the questions for this category? (Choose one):

Written answers to the questions

2. If you are submitting a video of up to five (5) minutes in length, provide the URL of the nominated video here, OR attach it to your entry via the "Add Attachments, Videos, or Links to This Entry" link above, through which you may also upload a copy of your video.

3. If you are providing written answers for your submission, you must provide an answer to this first question: If this is a brand-new product, state the date on which it was released. If this is a new version of an existing product, state the date on which the update was released:

Wolters Kluwer redefined corporate performance management with the announcement of its AI-powered CCH® Tagetik Intelligent Platform on May 15, 2024.

4. If you are providing written answers for your submission, you must provide an answer to this second question: Describe the features, functions, and benefits of the nominated product or service (up to 350 words):

**Total 350 words used.**

The AI-powered [CCH® Tagetik Intelligent Platform](#) digitally transforms the Office of the CFO's efficiency, accuracy, and strategic ability. Its state-of-the-art AI functionality empowers finance professionals to democratize access to meaningful financial data, manage and control massive datasets with unprecedented speed and automation, unlock hidden insights, and improve and expedite decision-making.

*The platform augments the scope, speed and accuracy of the financial close and planning while supercharging users' working experience with AI. It expedites decision-making, positively impacting close-adjacent processes, including account reconciliation, ESG, corporate tax and intelligent disclosure.*

The platform drives impact through unique, AI-enabled capabilities, including:

- **Ask AI**, an embedded super-agent that embodies *Agentic AI with a Finance Brain™*. Designed to address finance-specific needs, Ask AI supports a growing range of use cases. It responds to voice commands in multiple languages; provides self-service analytics through natural language-driven data exploration and visualization; and allows users to drill into data, test assumptions and run analyses without the need for IT skills.
- **AI Automapping**: Manually updating account mapping files, like Charts of the Accounts, is very time-intensive. AI Automapping significantly improves financial close efficiency by automatically matching external accounts/symbols to similar accounts/symbols, ranking data matches, and ensuring that data imports are successful on the first attempt.
- **AI Anomaly Detection**: Typically, incorrect data cannot be identified until the final stage of financial close. This feature empowers users to validate data accuracy, identify and investigate data outliers, once they've loaded files – when addressing those variances is less time consuming.
- **Intelligent Disclosure**: Empowers finance and business teams to collaborate by dynamically integrating financial, non-financial, and ESG consolidated numbers (accessed from familiar tools like Microsoft 365 and Copilot) to create data-linked reports that elevate disclosure narratives. This feature ensures that documents including annual filings and management presentations are consistent and accurate.

**AI Driver-Based Analysis:** When finance wants to understand the drivers behind an issue, like a decrease in profitability, AI Driver-Based Analysis analyzes massive datasets, then automatically ranks and highlights key drivers, in real-time. This improves analysis quality and efficiency, so users can more quickly and frequently access the insights needed to improve plans and forecasts.

5. If you are providing written answers for your submission, you must provide an answer to this third question: Outline the market performance, critical reception, and customer satisfaction with the product or service to date. State monetary or unit sales figures to date, if possible, and how they compare to expectations or past performance. Provide links to laudatory product or service reviews. Include some customer testimonials, if applicable (up to 350 words):

**Total 350 words used.**

**Wolters Kluwer earned the following acknowledgement from industry analysts in 2025, in recognition for its CCH Tagetik Intelligent Platform:**

- Named **Leader**, 2025 Gartner Magic Quadrant for Financial Close and Consolidation Solutions
- Named **Leader**, for 5th consecutive year, in **Nucleus Research CPM Technology Value Matrix**
- Named **Overall Leader**, for 5<sup>th</sup> consecutive year, for Customer Experience and Vendor Credibility, Dresner Advisory Services' 2025 Wisdom of Crowds® EPM Market Study
  - Also earned four **Application Innovation Awards from Dresner Advisory Services**, for Close Management; Financial Consolidation, Close Management and Reporting (FCCR); Financial Reporting and Sales Performance Management.

- Named **Premier Leader in BPM Partners Vendor Landscape Matrix**
  - 2025 BPM Partners Vendor Landscape Matrix also ranked CCH Tagetik 'Outstanding' in Financial Consolidation and Customer Success; 'Excellent' in Financial Planning.

**The CCH Tagetik Intelligent Platform also earned the following awards in 2025:**

- Winner: 2025 People's Choice Stevie® Awards for Favorite New Products, AI – Financial category
- Silver Stevie® Winner: AI/Machine Learning Solution - Financial category, 2025 American Business Awards®

**Customer testimonials for CCH Tagetik include:**

- **BNP Paribas**: "The benefit of CCH Tagetik is because it's a single platform, we don't have to reconcile data or worry about redundant data. It eliminates the possibility for discrepancies between figures. Instead, we have one data source from the start to the end, including data collection, building figures for budgets, and reporting." -- Karel Geeradyn, Finance Business Solutions
- **Business Engineering Corporation**: "With our previous system, it took 23 days to grasp quarterly profit forecasts, but after implementing CCH Tagetik, this was reduced to 12 days — approximately 50% improvement in efficiency. CCH Tagetik also enables monthly business status monitoring and multifaceted analysis, allowing us to provide information for swift management decisions." -- Betsuno, Representative Director, Senior Managing Director and CFO
- **UBE Corporation**: "Management decisions made without timely information and comprehensive, detailed analysis carry the risk of significant losses. Our implementation of the CCH Tagetik platform will allow us to implement the kind of data-driven business management that enables timely tracking of sales, profits and rapid Plan, Do, Check, Act (PDCA) cycles." -- Yagi, Assistant Manager, DX Promotion Office

6. You have the option to answer this final question: Reference any attachments of supporting materials throughout this nomination and how they provide evidence of the claims you have made in this nomination (up to 250 words):

**Total 143 words used.**

**Attachments/Videos/Links:**

[CCH Tagetik Intelligent Platform](#)

**Red text: No attachment available for this nomination.**