



LONGVIEW

an insightsoftware company

BUDGETING AND FORECASTING

with Tidemark

**Make better decisions
based on more consistent
and accurate plans,
budgets and forecasts.**



Planning budgeting and forecasting

Today's fast-paced, global business climate is characterized by fierce competition, increased customer demand for new and better products and services, vigorous M&A activity, and the ever present need for improved corporate governance and regulatory compliance. As a result, finance professionals, in virtually all organizations, are under greater pressure than ever before to deliver more accurate plans, budgets and forecasts and to respond quickly and confidently as business and market conditions change. Many finance departments still rely on legacy ERP systems, spreadsheets and data cubes for their planning, budgeting and forecasting processes. This approach is often time-consuming, cumbersome, costly, and inefficient and can easily consume all the resources within the finance department, leaving little or no time for higher-value analytical activity.

Tidemark

Tidemark is a comprehensive, web deployed application that drives finance processes, as well as a wide range of operational planning processes from a single repository of real-time, accurate information. Powerful workflow functionality, which includes e-mail notifications and alerts, simplifies planning, budgeting and forecasting processes and makes it easy for users to collaborate by tracking and communicating the progress of their plans and budgets. Flexible rolling forecasts, based on real-time information, provide greater visibility into future operating performance. Tidemark ties business plans, budgets and forecasts to strategic objectives, operational goals and targets.

Benefits at a glance

- Gain better understanding of financial and non-financial business performance drivers
- Make better decisions based on more consistent and accurate plans, budgets and forecasts
- Improve financial transparency and integrity for better regulatory compliance
- Eliminate time-consuming, cumbersome and inefficient manual and spreadsheet-based planning activities
- Respond faster and more confidently with updated plans and forecasts as business and market conditions change using driver-based modeling and rolling forecasts

- Enable finance staff to spend more time on higher-value analysis activities rather than on data collection and validation
- Equip management with fast, easy access to KPI information and reports through customizable dashboards
- Ensure a single version of truth and promote a true closed loop of all financial processes by leveraging a unified platform for performance management
- Provide real-time, interactive information anytime, anywhere via dashboards and reporting on the web or on mobile devices
- Highly sophisticated modeling capabilities allow you to create, analyze and assess business rules and what-if scenarios within your planning process to help achieve your strategic goals
- Innovative, highly scalable and secure technology architecture supports an unlimited number of users within an organization and big data without comprising performance
- All data, business rules and key drivers are centralized in a single repository of accurate information that can be accessed by all employees involved in the process
- Finance staff can shift their focus from data collection and validation to meaningful data analysis
- A single repository of 'financial truth' gives all users a unified, consistent view of plans, budgets and forecasts, allowing users to focus on decision-making rather than on data accuracy

Workflow management simplifies enterprise collaboration

Tidemark simplifies collaboration by tracking information as it flows through your process, making it easy for managers to monitor and report on the status of the plan and enabling users in departments across a global organization to participate in the planning and budgeting process. Workflow management within Tidemark helps easily communicate data outliers and identify process bottlenecks, issuing e-mail alerts to stakeholders throughout the process, reducing the overall planning cycle time and providing more accountability, ownership and control.

Real-Time planning and forecasting with advanced modeling

An essential element of an effective planning process is the ability to model financial outcomes and the business parameters and activities that ultimately drive those outcomes. Modeling within Tidemark can be either bottom-up (i.e., vary the drivers to see what outcomes are produced) or top-down (i.e., choose a desired outcome and see how the drivers need to flex to achieve it). Unlike other planning solutions that focus on financially oriented planning, Tidemark supports the creation of enterprise-wide models based on both financial and non-financial business drivers. The powerful modeling engine allows complex calculations and limitless "what-if" scenarios to be an integral part of your planning process.

Forecast with speed, consistency and data integrity

With Tidemark, periodic results are automatically blended into forecasts or rolling forecast periods when each reporting period closes, whether quarterly, monthly, weekly or even daily. Tidemark also features dynamic forecasting - models are re-run based on changes to data elements fed in from other sources and an updated consolidated forecast is presented on executive dashboards - all automatically and instantaneously. The single, unified platform ensures optimal levels of consistency and data integrity for all business processes including planning, budgeting and forecasting. The sharing and reuse of data, definitions and calculations eliminates redundancy, errors and duplication of effort.

Simplify and accelerate planning processes with allocations

Tidemark provides easy-to-use features to simplify and accelerate your planning, budgeting and forecasting processes, including, top-down allocation that automatically spreads high level targets across multiple dimensions such as products, customers, departments; allocating values based on seasonal and historical patterns; allowing commentary at any level of detail; and calculating percentage or monetary increases/decreases.

Real-Time reporting using web, excel and mobile dash boards

Users can securely access information from any location, inputting and viewing data quickly and easily in real-time. Results are available dynamically anywhere, anytime, on any device. Tidemark Smart Client empowers end users by allowing them convenient and easy access to powerful, interactive modeling functionality through the web, while hiding the complexity behind it.

Dramatically simplify reporting and system management

The Hierarchy Manager within Tidemark supports simultaneous legal and management reporting views in a single environment. Its built-in financial intelligence understands balance forward and standard type rollups, as well as how accounts behave with respect to others in the hierarchy. These features, combined with the integrated reporting and dashboard capabilities provide a unified solution that management can leverage to get the key information needed to make accurate and timely decisions.

Consulting and training services

Tidemark's proven implementation methodology delivers timely and predictable results, and because knowledge transfer is critical to the success of every implementation, our Professional Services teams work with you every step of the way to ensure your objectives are met. From developing training plans customized to your needs, to on-site architects and implementation staff, our knowledgeable, industry veterans will ensure you get maximum value from your investment.

Technical support

Our internal team of financial and technical support specialists provides customers with the best "behind the scenes" technical support services to ensure that your Tidemark investment delivers maximum results and performance. Our customer technical support services include 24/7 support services by our technology professionals, award winning documentation and access to certified technical resources.

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