CPM Trend Monitor 2026

The World's Largest Survey of Corporate Performance Management (CPM) Trends

Joint BARC and BPM Partners Research Study

Research sponsored by:

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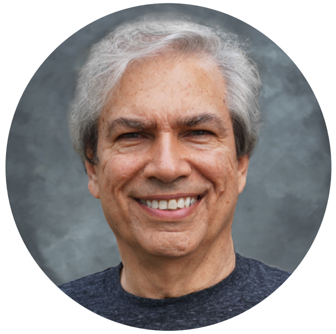

Craig Schiff | CEO | BPM Partners

Craig Schiff is CEO and Lead Analyst at BPM Partners, a vendor-neutral advisory services firm that helps clients address their performance management challenges with a comprehensive, rapid and cost-effective methodology.

He was a founding member of Hyperion (which is now part of Oracle), and spent 16 years as SVP of its Products & Services group. More recently he was co-founder and CEO of OutlookSoft (now part of SAP). Mr. Schiff was also a founding member of the BPM Standards Group and is a recipient of the Ernst & Young Entrepreneur of the Year Award.

He has spent 30+ years focused on budgeting, forecasting, consolidation, reporting and analytics. He has contributed his expertise to CFO Magazine, American Productivity & Quality Center, Association for Financial Professionals, Institute of Management Accountants, IndustryWeek, TechTarget, Information Management, TDWI and other leading finance and technology focused publications and conferences. For the fifth year in a row BPM Partners has been recognized as one of America's Best Management Consulting Firms by Forbes.

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Foreword

The rapidly changing business environment, increasing complexity and growing need for agility and data-driven decision-making underscore the critical nature of Corporate Performance Management (CPM) today. Businesses face constant economic volatility in the form of inflation, supply chain disruptions and geopolitical tensions. Organizations must adapt quickly to these conditions. To remain competitive in dynamic markets, businesses must make faster, more informed decisions based on financial, operational and strategic data.

Welcome to the second annual BARC x BPM Partners global CPM trends report. With 989 participants from various industries and regions, the CPM Trend Monitor 2026 reveals the global priorities of planning, consolidation and analytics professionals regarding current CPM trends. Their input helps distinguish between market hype and enduring trends, offering crucial insights for organizations navigating the evolving landscape.

We combined results from the 2025 BARC Planning Survey, the 2025 BARC Financial Consolidation and Group Accounting Survey and the 2025 BPM Partners BPM Pulse research study to produce a comprehensive global view of key CPM market trends. There are many benefits to working together and combining our data, including:

- The larger combined sample size ensures greater accuracy and diminishes the impact of outliers.
- Since the two firms have different geographic focus areas, the combined survey data provides a unique global view of the state of CPM and enables us to understand regional differences.
- Having two senior analysts from two different firms analyze the results allows for diverse opinions and insights based on their backgrounds and experiences.

Our primary goal in creating this report is to provide end-user organizations with the most current and complete information as they embark on new or expanding CPM projects. The data and analysis contained herein should support project benchmarking and provide data from peers that may encourage discussions around areas not previously considered for inclusion in projects. Benchmarking is most useful when the data comes from similar organizations, usually meaning similar industries, company sizes and geographic regions.

Although our focus is on end-user organizations, vendors can benefit from the data and analysis contained in this report as well, which in turn also benefits end users. Vendors looking to expand their success outside of their home region can leverage this data for product planning as they try to address the needs of the new markets they are entering. It can also help them sharpen their messaging to speak to what is most important in each region.

We'd like to thank the vendors that have supported our efforts and enabled us to distribute this report to the widest possible audience. Most importantly, we hope that we have achieved our primary goal and you find the analysis and recommendations provided in this report useful in your own CPM projects.

Dr. Christian Fuchs, Craig Schiff
November 2025

Executive Summary

Executive Summary

The CPM landscape continues to evolve rapidly. While AI has emerged as a transformative force, pushing decision-making and automation into the spotlight, this study reveals that the most valued trends are still rooted in fundamental topics. Based on insights from 989 participants across various industries, it offers a unique perspective on the state of CPM.

A solid data foundation and stronger self-service use in business departments, along with CPM integration, remain high on the agenda. This underlines the need to balance conceptual and technological elements for lasting success. We've distilled the study's key findings into six hot spots to showcase the most striking contrasts and emerging trends.

1 Highlight – Shaping the Future of CPM: Key Trends for 2026

Several key trends are shaping the future of Corporate Performance Management (CPM) in 2026 as organizations navigate increasing complexity and uncertainty. These trends highlight the growing demand for high-quality data, seamless integration, business self-sufficiency and advanced planning to foster agility and informed decision-making.

Data management has emerged as the top trend, reflecting its critical importance. High-quality, consistent and reliable data forms the foundation for effective decision-making and drives innovation. To unlock its full potential, companies must focus on integration, quality, security and governance. Establishing this solid data foundation is also an essential prerequisite for leveraging advanced technologies such as Artificial Intelligence (AI).

Organizations are also prioritizing business self-sufficiency by adopting user-friendly CPM software with **self-service capabilities**. Empowering business users to update plans and forecasts independently reduces reliance on IT, shortens cycle times and enhances agility. This shift accelerates decision-making and has made self-sufficiency a cornerstone of modern CPM. It is often cited as one of the top reasons for replacing incumbent solutions.

Another major trend is **holistic integration**. Companies are aligning operational plans with financial results, connecting strategic planning with budgeting and forecasting and unifying CPM processes such as planning, reporting, analytics and financial consolidation within a single, transparent platform. Both unified all-in-one suites and well-integrated best-of-breed solutions delivered by a single vendor are addressing this need.

Finally, **simulations and scenario planning** have become indispensable for managing uncertainty. By evaluating alternative scenarios, companies can identify risks, develop contingency plans and prepare for critical situations. These tools enhance resilience and enable proactive, data-driven decisions in dynamic environments. The pace of today's global economic shifts has further accelerated this trend.

Together, these trends represent the most critical CPM priorities for 2026. They equip organizations to adapt, innovate and thrive despite ongoing challenges.

2 Highlight – CPM Trends for the Future: Important, but currently overshadowed by more immediate priorities

While certain Corporate Performance Management (CPM) trends have significant potential, they are currently viewed as less critical than more immediate priorities such as data management, integration and self-sufficiency. Their lower ranking reflects the reality that many organizations are still addressing foundational challenges before adopting more advanced capabilities.

Although **Artificial Intelligence (AI) and Generative AI** are widely recognized as transformative technologies, their immediate relevance for business users remains limited. While software vendors strongly promote these trends, business users are focused on tackling pressing issues such as market volatility, regulatory compliance and data management. Barriers to AI adoption include unsuitable data foundations, a lack of AI skills and resources, and unclear use cases. As a result, AI and generative AI are often seen as future priorities rather than immediate necessities. However, the rise of Agentic AI and its promise of productivity gains is starting to shift perceptions. Vendors under consideration are increasingly expected to articulate a clear AI roadmap.

Prebuilt CPM solutions, such as industry-specific models or templates, are also ranked lower in importance. Many companies prefer the flexibility of customizable platforms, believing their requirements are too unique for prebuilt solutions. However, prebuilt options can significantly reduce implementation time and cost, and may gain traction as organizations seek faster deployment. Vendors are beginning to offer prebuilt applications that are both more capable and more configurable than in the past, which could drive wider adoption.

The importance of **Environmental, Social, and Governance (ESG)** reporting has also declined, particularly in Europe. The European Commission postponed reporting obligations for small and medium-sized companies until 2028, which has reduced the sense of urgency. ESG remains a strategic topic for larger organizations, but demand in North America, never very strong to begin with, has also declined.

These trends remain relevant but are currently overshadowed by more immediate priorities. As organizations resolve foundational challenges, they are likely to become more important in the coming years.

Executive Summary

3 Highlight – How Software Vendors and Software Users View CPM Trends

The priorities of software vendors and users differ significantly, reflecting their distinct roles and focus areas. Vendors generally consider CPM trends to be more relevant overall, likely due to their need to anticipate market demands and position their solutions as innovative. Users, on the other hand, prioritize trends that address their immediate challenges and day-to-day needs.

Vendors focus on trends like **simulation and scenario planning**, **integrating all relevant CPM processes into one software platform** and the **use of CPM software in the cloud**. These priorities align with their mission to deliver comprehensive, scalable solutions. Cloud adoption, for example, is critical for vendors as it enables faster deployment and easier updates, while integrated platforms and scenario planning reflect the demand for seamless workflows and advanced decision-making capabilities.

Among users, **business users** prioritize trends like **integrating operational plans with financial results planning**, **self-sufficiency in business departments** and **integrating strategic planning with annual budgeting and forecasting**. These trends highlight their need for tools that improve results quality, simplify processes and reduce IT dependency. Meanwhile, **IT users** focus on **Artificial Intelligence (AI) and Machine Learning (ML)**, **Generative AI** and **Environmental, Social, and Governance (ESG) reporting**, reflecting their responsibility to advance technological capabilities and address growing sustainability demands.

These differences underline how vendors and users approach CPM from complementary perspectives. Vendors emphasize innovation and scalability, while users prioritize functionality tailored to their specific roles. Although AI capabilities have so far been a lower priority for users, vendors have been ahead of the curve in delivering this functionality, and our field work shows that user interest, especially in larger organizations, is beginning to catch up.

4 Highlight – CPM Trends for Large versus Small Companies

The CPM priorities of large and small companies reflect their unique challenges. Large companies focus on managing complexity and compliance, while small companies prioritize building a strong foundation for efficiency and resilience.

For **large companies**, **finance self-sufficiency** is a key priority. Empowering business teams to operate independently of IT accelerates decision-making across complex organizational structures. Similarly, **integrating financial consolidation with group accounting processes** (such as tax, close management and disclosure) is essential for consistency, operational efficiency and meeting regulatory demands. The emphasis on **Environmental, Social, and Governance (ESG) reporting and performance management** reflects the increasing pressure on large organizations to address sustainability goals and comply with disclosure requirements. These priorities highlight the need for large companies to balance agility with transparency and control.

Small companies, with limited resources, focus on **integrating strategic planning with annual budgeting and forecasting** to ensure alignment between long-term goals and short-term plans. **Risk and compliance management** is another priority, as smaller organizations are more vulnerable to unforeseen risks or regulatory penalties. Additionally, **integrating all relevant CPM processes into one software platform** is critical for small companies to streamline workflows and maximize efficiency across planning, reporting and analytics.

These differences underscore how company size shapes CPM priorities. Large companies focus on managing scale and external requirements, while small companies aim to build resilience and efficiency through integrated solutions.

Executive Summary

5 Highlight – Leaders vs. Laggards – How Top Performers Prioritize CPM Trends

The CPM priorities of leaders – companies achieving the highest business benefits from their CPM solutions – differ significantly from those of laggards. Leaders not only see trends as more relevant overall but also prioritize integration, innovation and sustainability to maximize the value of their CPM systems.

Leaders focus heavily on integration across all levels of CPM and planning. They prioritize **integrating strategic planning with annual budgeting and forecasting** to ensure alignment between long-term goals and short-term execution. Similarly, they emphasize **integrating operational plans with financial results planning** to create a unified view of business performance. This holistic approach enables leaders to adapt quickly to changing conditions while maintaining consistency and transparency.

Using CPM software in the cloud is another top priority for leaders because it provides scalability, flexibility and real-time access to data. Additionally, leaders emphasize **integrating CPM with Business Intelligence (BI) and analytics**, which enables advanced reporting, scenario modeling and data-driven decision-making.

Leaders also prioritize **Environmental, Social, and Governance (ESG) reporting and performance management**, recognizing the growing importance of sustainability for stakeholders and regulatory compliance. This focus demonstrates their commitment to aligning financial and non-financial goals for long-term success.

By prioritizing integration, cloud adoption and sustainability, leaders set themselves apart from laggards. Laggards often lack the strategic alignment and technological foundation needed to fully leverage CPM systems and typically use CPM as a point solution to address a specific pain or challenge, such as budgeting. These differences highlight how leaders use CPM to drive agility, insight and competitive advantage.

6 Highlight – Regional Differences in CPM Priorities: North America vs. Europe

The CPM priorities in North America and Europe reflect distinct regional challenges and business environments. While North America focuses on foundational efficiency and risk management, Europe prioritizes advanced technologies and sustainability, driven by regulatory and market pressures.

In **North America**, the **use of CPM software in the cloud** is a top priority, reflecting the region's strong adoption of cloud technologies to enhance agility, scalability and cost efficiency. **Risk and compliance management** is also a key focus, as companies seek to navigate regulatory complexities and protect against financial and operational risks. Additionally, **data management for CPM**, including data integration, quality and master data management, is critical for ensuring accurate and reliable insights in decision-making. These trends highlight North America's emphasis on building a strong, efficient foundation for CPM processes.

In **Europe**, **ESG reporting and performance management** is a leading priority, driven by stringent regulatory requirements such as the EU Taxonomy and Corporate Sustainability Reporting Directive (CSRD). European companies are also investing heavily in **simulation and scenario planning** to navigate uncertainty and plan for multiple outcomes. Furthermore, **Artificial Intelligence (AI), Machine Learning (ML) and Generative AI** are high priorities, reflecting Europe's focus on leveraging advanced technologies to enhance forecasting, reporting and decision-making.

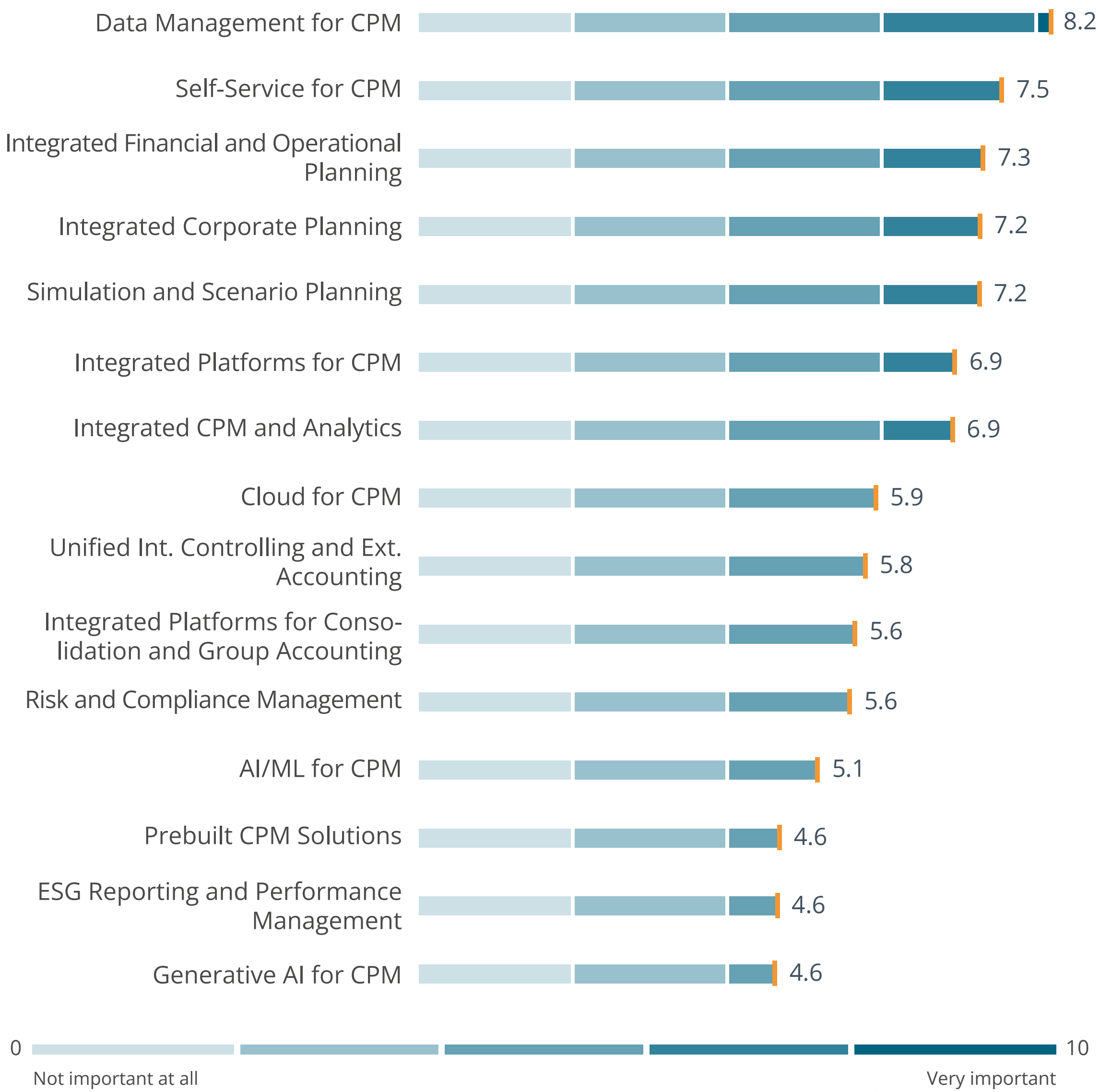
These differences illustrate how regional factors shape CPM priorities. North America emphasizes operational efficiency and risk mitigation, while Europe focuses on sustainability and innovation.

Survey Results

Survey Results

Results Overview

989 CPM Practitioners Have Their Say: Importance of Current Trends and Priorities for 2026



n = 989

Viewpoint

We asked users, consultants and software vendors of Corporate Performance Management (CPM) technology to rate the importance of fifteen trending topics.

The 2026 BARC x BPM Partners CPM Trend Monitor shows that while foundational trends remain critical, emerging technologies are shaping the future.

Data management is the most important trend reflected in this year's CPM Trend Monitor, highlighting the critical role of a solid data foundation for making informed decisions. High-quality, consistent and reliable data is essential for innovation, process automation and enabling technologies such as Artificial Intelligence (AI).

Self-service use of CPM software in business departments is a top trend that has remained steady for years. Companies are placing increasing emphasis on ease of use and user-friendliness when selecting CPM software.

Tight integration of all required CPM elements for transparent, high-quality decisions is underscored with five mentions among the top ten trends. This includes not only the integration of corporate planning, strategy, finance and operations, but also integration with Business Intelligence (BI), financial consolidation and group accounting.

Simulation and scenario planning enhance resilience and rank fifth as organizations prepare for uncertainties and potential risks by evaluating alternative future scenarios and assessing their potential impact on business goals.

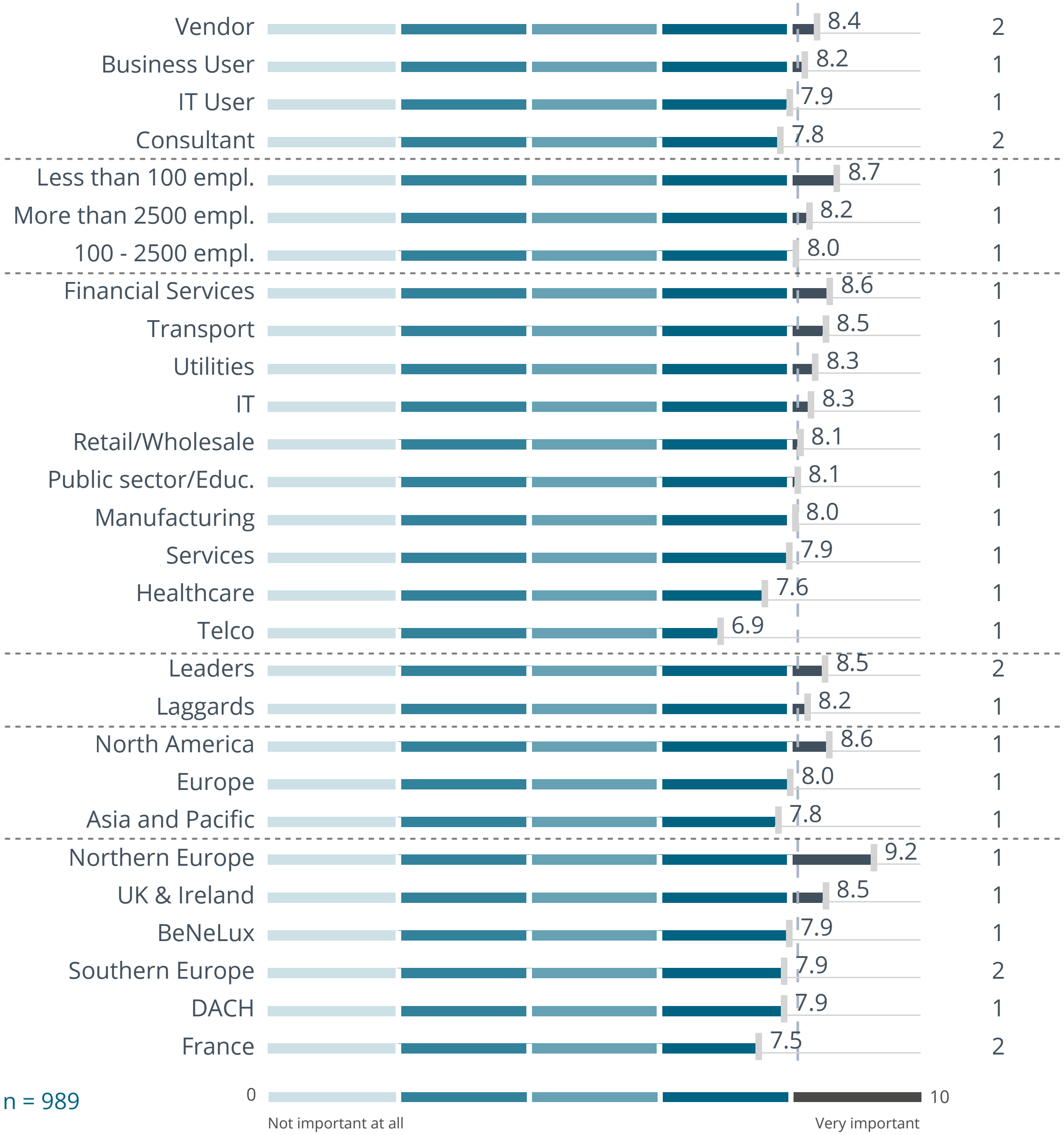
In regions such as North America and the Asia-Pacific, cloud technology and risk and compliance management play a larger role. Meanwhile, Generative AI and AI are more important to European participants than to North Americans.

Top 15 Trends in Detail

Top 15 Trends in Detail

Data Management for CPM

Regardless of company size, industry, or region, data management is a cornerstone of successful CPM and the number one trend this year



Viewpoint

Data management is the most important trend in this year's CPM Trend Monitor, reflecting its critical role across companies of all sizes, industries and regions. Treating data as a strategic asset is now a top priority for finance leaders. High-quality, consistent and reliable data is essential not only for informed decision-making but also for driving innovation, automating processes and enabling technologies such as Artificial Intelligence (AI) and Machine Learning (ML).

Effective data management requires addressing key aspects such as integration, quality, security and governance. Integrating data from disparate systems spanning financial and operational planning, financial consolidation, reporting and Business Intelligence (BI) remains a significant challenge, particularly in organizations with historically complex system landscapes. As internal and external data volumes grow, ensuring data consistency and reliability is paramount for building trust among business users and making accurate decisions.

Master data provides the structure and context needed to unlock the value of data. Harmonized master data fosters a unified understanding across divisions, enabling consistent reporting and data-driven operations. Automation, such as data cleansing and reconciliation, further enhances efficiency while reducing manual errors.

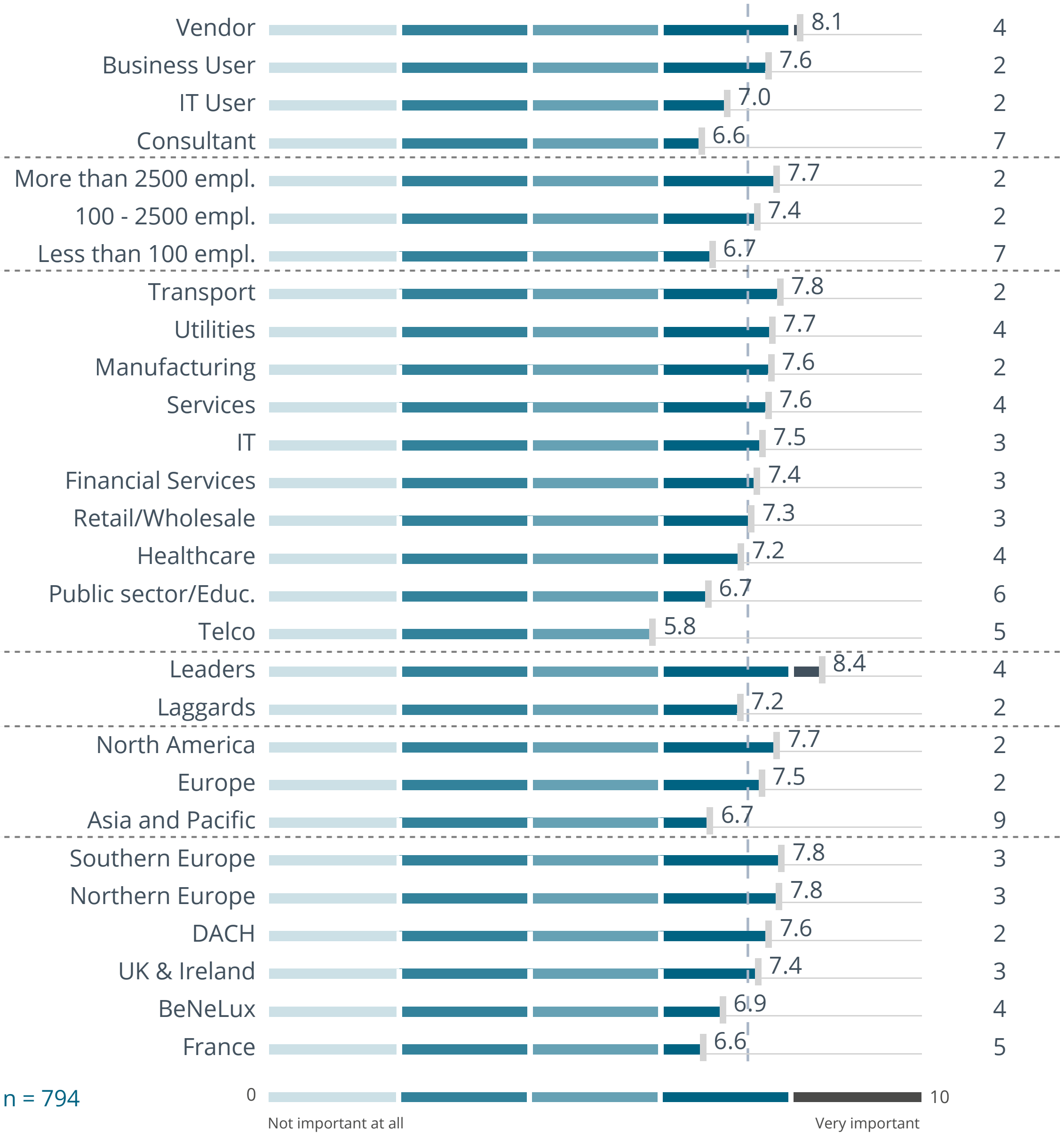
Data governance is the backbone of sustainable data management. By defining roles, responsibilities and processes, it ensures data security, compliance and long-term quality.

As organizations face increasing complexity, prioritizing robust data management is essential to unlock the full potential of Corporate Performance Management (CPM) systems, foster agility and maintain a competitive edge in a data-driven world.

Top 15 Trends in Detail

Self-Service CPM

Self-Service CPM continues to be a top priority for most organizations and results in more successful CPM rollouts



Viewpoint

Self-service CPM in business departments and finance self-sufficiency have been priorities for several years. Today, this is the second most important trend for business users in midmarket companies and large enterprises. To reduce cycle times and lessen reliance on IT, companies are placing greater emphasis on user-friendliness and ease of use when selecting performance management software. This shift has accelerated as the frequency of required plan updates has increased along with the need to shorten cycle times.

When evaluating new CPM solutions, ease of use, finance self-sufficiency, performance and scalability are top criteria that are often used to decide between otherwise equally capable options.

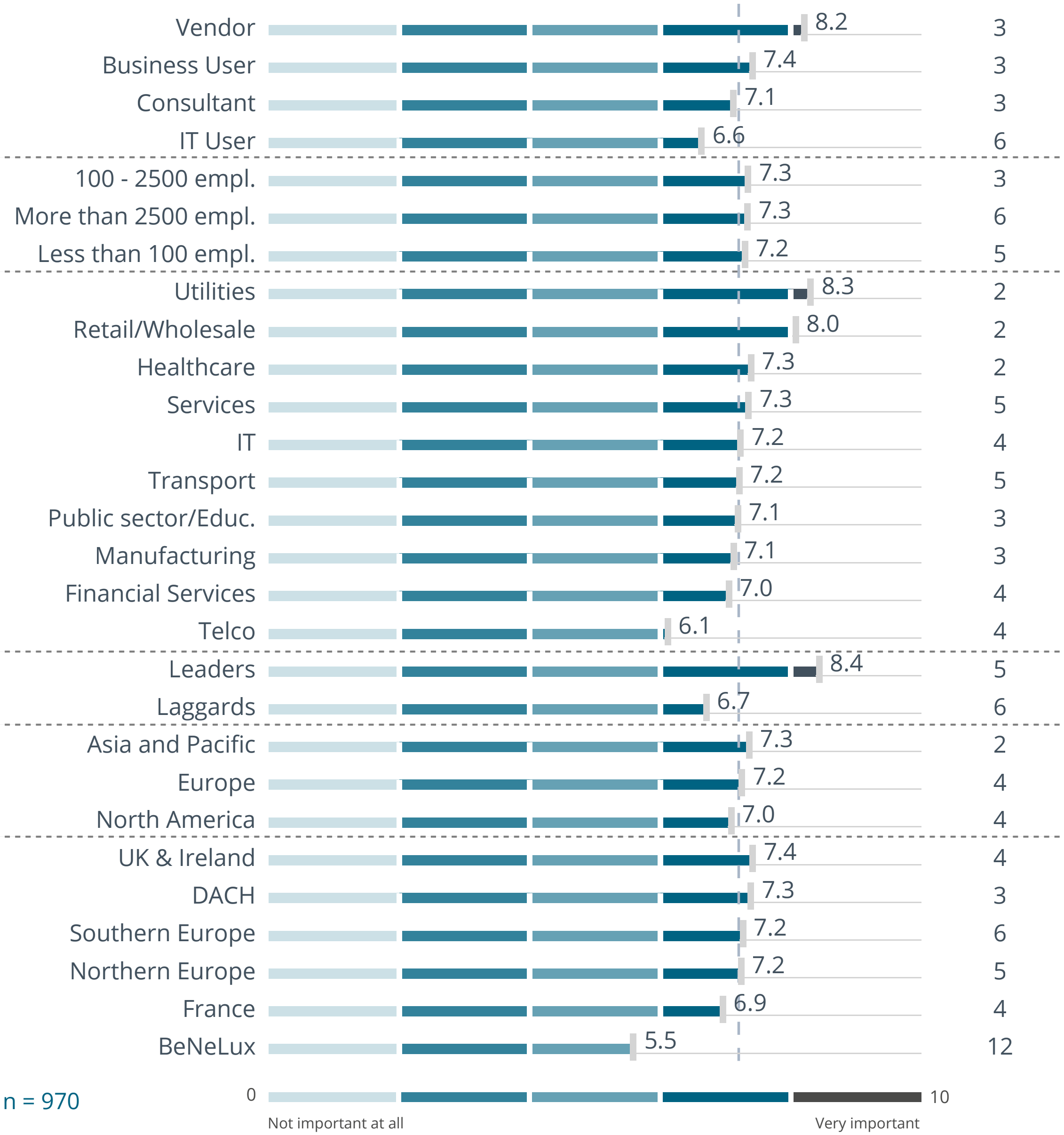
The need for self-service CPM is also driving the replacement market. Older legacy systems and standalone spreadsheets are no longer practical given today's rising demands on finance and the limited resources in both finance and IT. Younger potential hires are also reluctant to join companies still using outdated technology that requires a steep learning curve.

One of the biggest challenges organizations face with CPM systems, especially for planning, is adoption and utilization. Not just new hires but also existing staff are already stretched thin and lack the time or motivation to learn a new system. At the same time, companies are hesitant to push users to adopt these tools, instead relying on the pull of a useful new system to make work easier. Ease of use is critical to this approach. Self-service CPM helps ensure a successful rollout and full utilization of the solution, which is why it is no surprise that leaders recognize its importance.

Top 15 Trends in Detail

Integrated Financial and Operational Planning

Integrated financial and operational planning is becoming the norm, and leads to a more holistic view of the business that enables better decision-making



Viewpoint

The linking of all operational sub-plans with each other (such as sales, production and resources) and with financial planning (balance sheet, P&L, cash flow) is at the core of integrated corporate planning. Connecting integrated sub-plans with financial results planning provides a more holistic view of the enterprise. Financial planning relies on operational assumptions such as sales volumes or the availability of resources like personnel and raw materials, which creates interdependencies between the individual sub-plans and financial results planning.

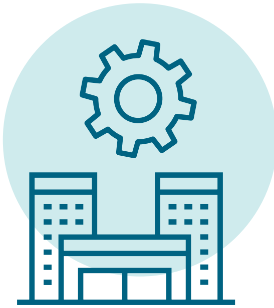
The effects of operational plans on a company's financial results become directly visible and conclusive only when plans are fully integrated. As actual data becomes available, significant variances from operational plans must also trigger adjustments to financial plans in the next forecast. This is sometimes referred to as financial/operational signaling, where operational data serves as a leading indicator of potential issues in achieving the financial plan.

This is critical as increasing demands for more frequent and faster forecasts make comprehensively integrated functional models essential. Isolated models with cumbersome and error-prone data transfers can no longer meet the needs of today's decision-makers.

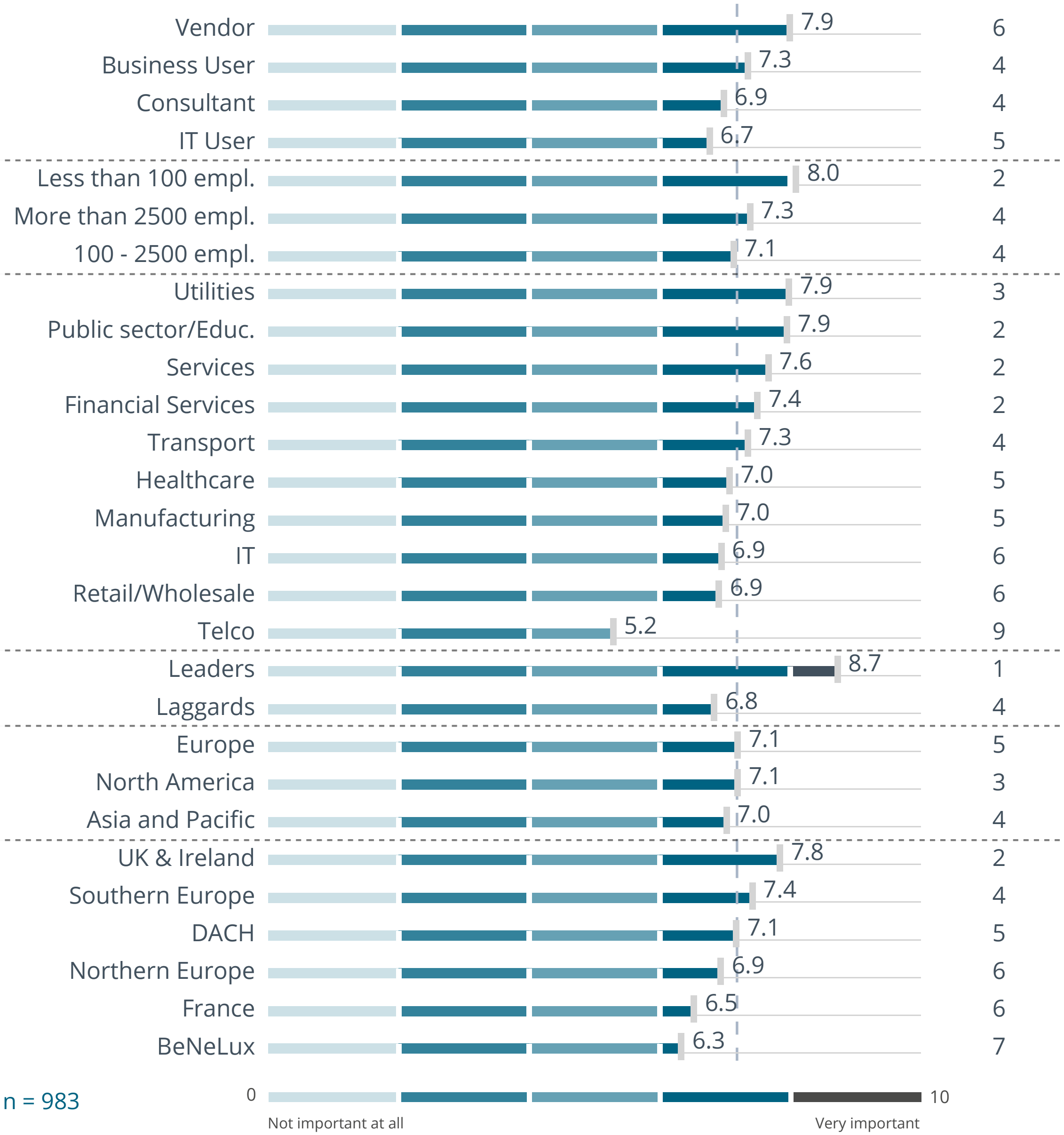
It is difficult to have confidence in achieving financial plans if the underlying operational plans cannot be easily accessed or trusted. This explains why this is a top 3 trend for both business users and vendors. For many years, vendors focused on perfecting their out-of-the-box financial planning capabilities and left operational planning to either third-party providers or their own flexible platforms where users built custom operational solutions. That is changing, and most major vendors now offer their own prebuilt solutions for key areas of operational planning such as sales, workforce and supply chain.

Top 15 Trends in Detail

Integrated Corporate Planning



Integrated corporate planning enables an organization to plan, monitor and execute on its strategy



Viewpoint

Organizations are being called upon to make more frequent and accurate decisions in today's dynamic environment. These decisions affect investments, staffing levels, product and customer focus and more. Increasing market dynamics and growing time pressure are forcing companies to update their targets and forecasts at ever shorter intervals. Planning, budgeting and forecasting must be adapted to these new requirements. The relevance of carefully integrated corporate planning, which provides valuable information and insights to management, is expected to continue to grow. Excelling in this area can give companies a clear competitive advantage, and our data confirms it as the top trend among leading organizations.

While many companies have made progress in integrating financial and operational plans and sub-plans, strategic and long-range planning is often overlooked. Decisions made today to solve short-term issues may have long-term ripple effects that require updates to long-range plans. It also makes sense to validate short-term decisions against the company's strategic plan to minimize potential negative impacts.

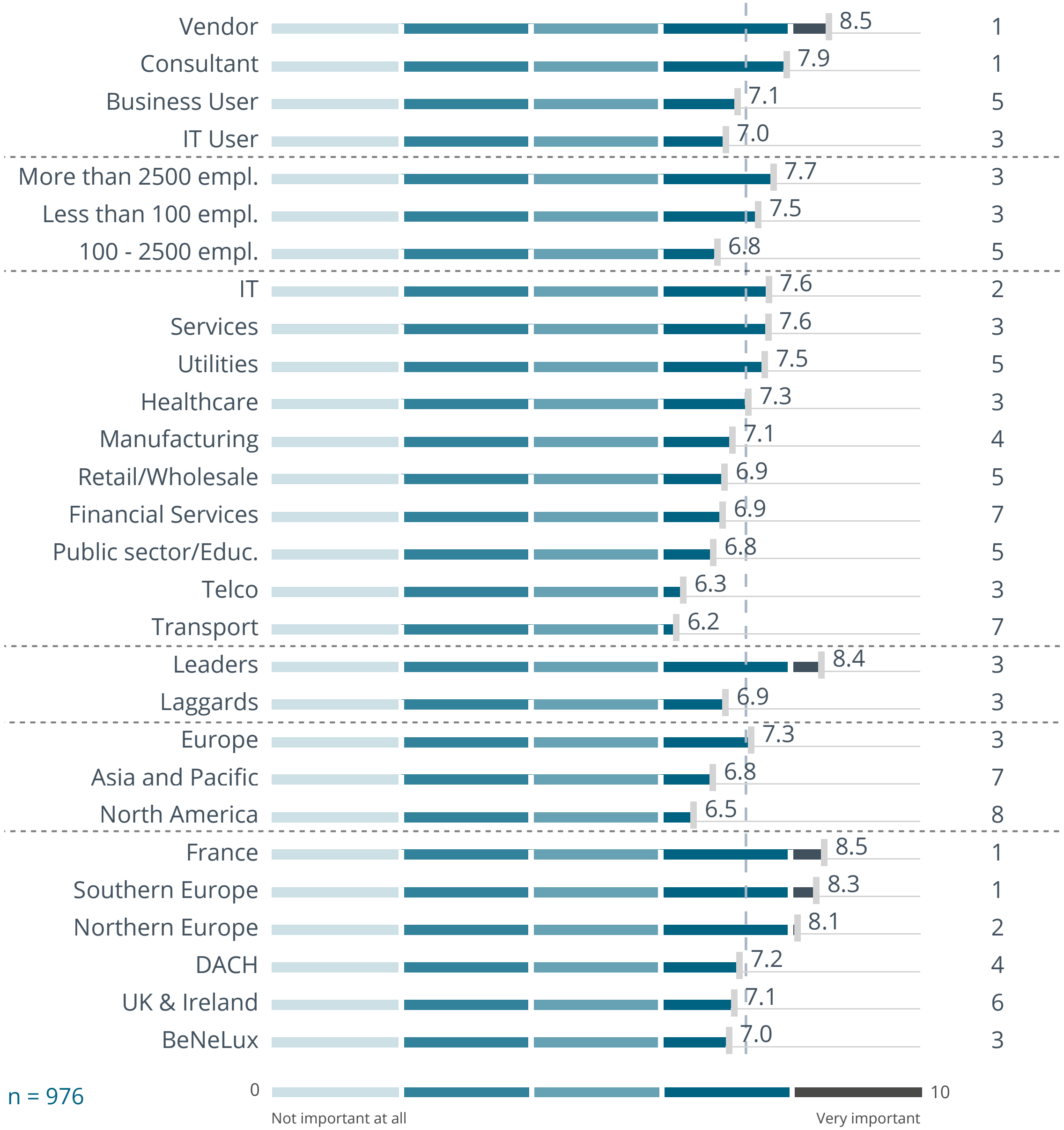
Holistic integration of strategic, tactical and operational plans, as well as all sub-plans with each other and with results planning, is the essential foundation for high-quality results in corporate planning. It is also the backbone for the use of modern planning approaches, from value driver-based planning to statistical methods and machine learning (predictive planning and forecasting).

The integration of strategic, financial and operational planning creates substantial added value and is increasingly essential for corporate management. It aligns with the original and straightforward definition developed by BPM Partners: Performance Management enables an organization to plan, monitor and execute on its strategy.

Top 15 Trends in Detail

Simulation and Scenario Planning

Simulation and scenario planning has become essential in recent years as the uncertain environment requires companies to prepare for a range of outcomes



Viewpoint

Simulations are essential for corporate management and the well-founded evaluation of alternative courses of action. They provide decision-makers with valuable insights, especially in dynamic and uncertain situations, helping them assess possible future developments and a company's potential responses. Vendors and consultants currently see this as the top trend, while business users are not quite as far along. Interest also varies by geography, which may reflect the economic conditions in each region at the time of the survey.

Regardless of how the importance of this trend is rated, almost every company we work with is incorporating scenario planning into their forecasting process. Some vendors have embedded Artificial Intelligence (AI) into their scenario planning solutions to simplify the process and improve results by generating more accurate probabilities from a broader range of data.

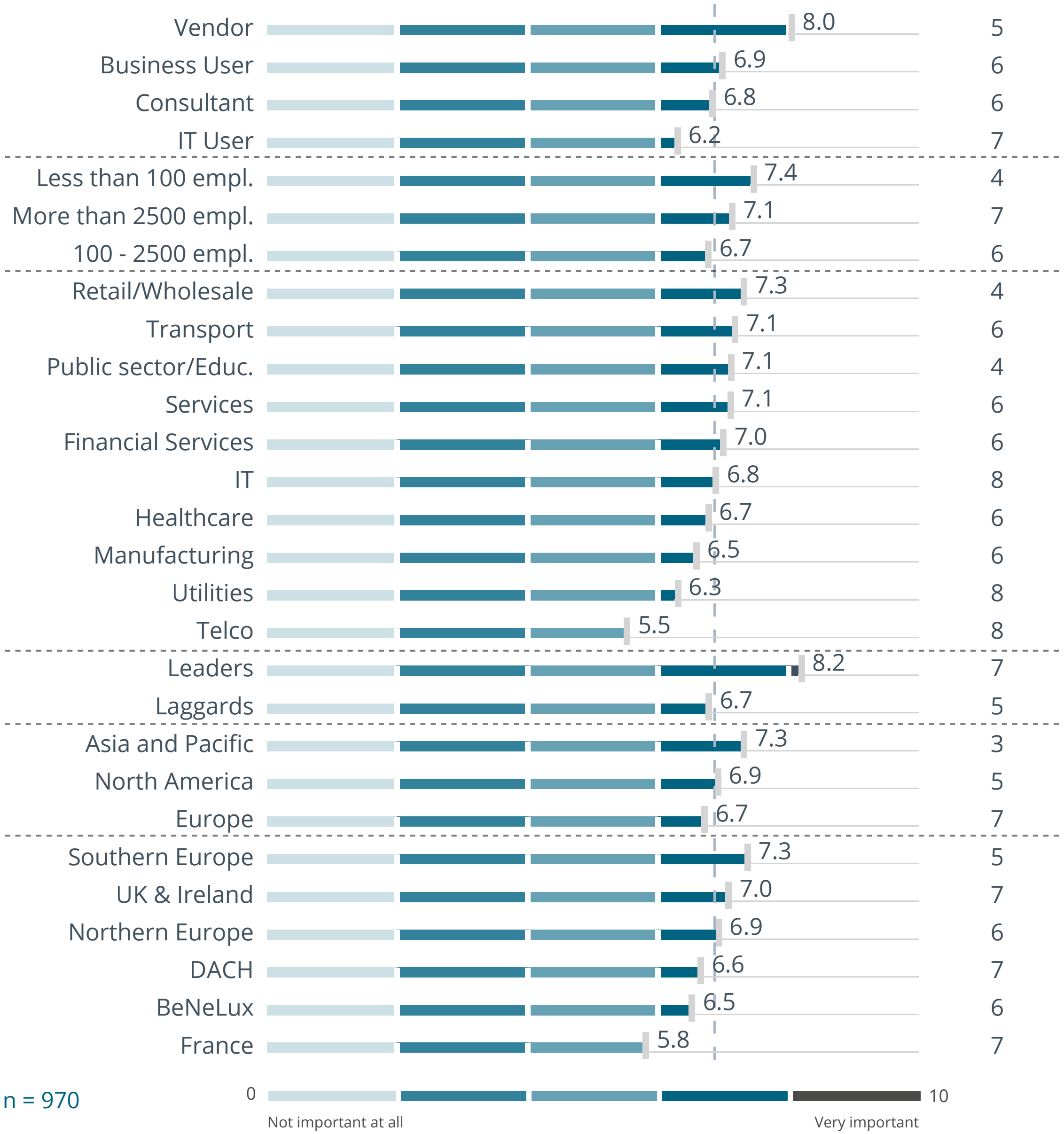
When using simulations, companies can analyze and compare different scenarios in a well-founded way to evaluate possible future developments and external effects. This approach gives corporate management a solid basis for decisions. Scenarios, both positive and negative, should be enriched with risk assessments and concrete measures to evaluate probabilities and potential courses of action. The simulation of scenarios is becoming a decisive competitive factor, enabling companies to prepare for future developments and identify both risks and opportunities.

Despite their clear value, simulations have not yet been universally adopted. Our research and consulting experience shows that their use is still uneven, but adoption continues to grow as more organizations recognize their importance.

Top 15 Trends in Detail

Integrated Platforms for CPM

Integrated platforms for CPM are the key to transparent and agile decision-making, especially for leading companies, which usually have a higher level of maturity



Viewpoint

In today's volatile and fast-paced business environment, decision-making depends on a unified view of data and processes. Unified CPM platforms, which integrate planning, financial consolidation, reporting and Business Intelligence (BI) analytics, are becoming essential for organizations to achieve transparency and agility.

For sustained success, having all these capabilities in one integrated platform is crucial. Leading companies understand that transparent decision-making requires analyzing historical data, identifying current trends and aligning with future forecasts, a capability that unified CPM platforms are uniquely positioned to deliver as businesses face increasing complexity.

Beyond planning, standard reporting, ad hoc queries and dashboards are key BI and analytics requirements for CPM systems. Dashboards in particular are gaining importance as businesses seek to condense insights from millions of records into visual formats that are easy to interpret. Many companies initially prioritized dashboards in CPM projects, connecting them to existing data warehouses, but over time planning has emerged as the central focus of many CPM initiatives.

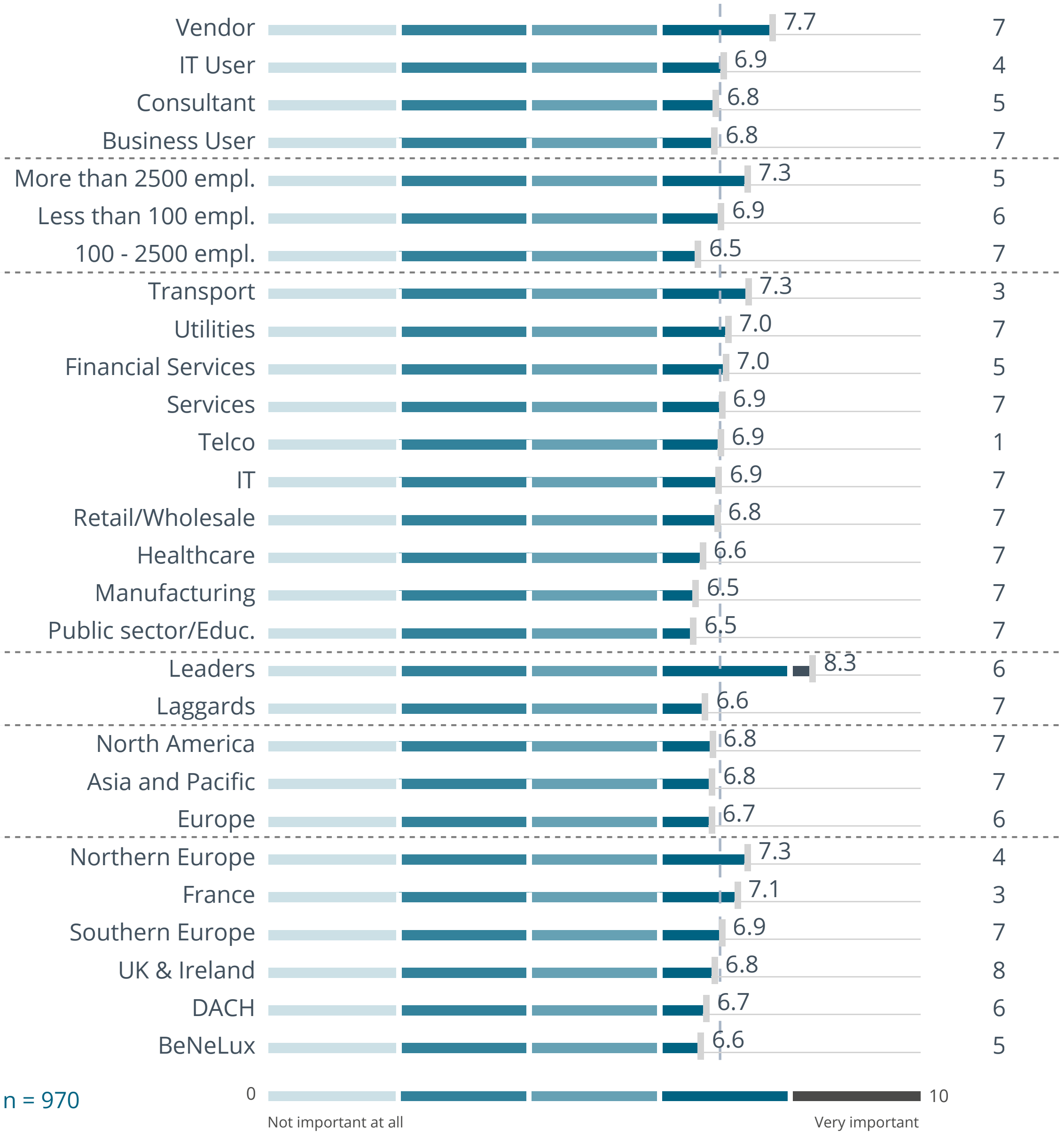
Financial consolidation is also increasingly recognized as a critical component of CPM. Consolidating actuals, and increasingly financial plans, across subsidiaries and groups is essential for accurate balance sheets, income statements and cash flow planning. While some companies view financial consolidation mainly as an external reporting function, it is equally vital for creating the single source of truth needed for internal management reporting.

As businesses face growing complexity, unified CPM platforms offer the integration and real-time insights needed to enable data-driven decisions, making them a cornerstone of modern performance management strategies.

Top 15 Trends in Detail

Integrated CPM and Analytics

Integrated CPM and analytics enables a true understanding of what is going on in the business and should see more adoption as vendors deliver live integration



Viewpoint

Analytics are key to understanding what is happening in the business and why. Only the integration of analytics into the CPM solution allows comprehensive and efficient verification of the achievement of objectives, as well as the effective application of statistical methods and machine learning (ML) in planning and forecasting.

The integration of CPM and analytics is not yet a top trend for most business users, but IT ranks it in their top four. Despite the wide range of products on the market that offer this capability, most have not been successfully integrated. As a result, many companies still have to carry out time-consuming data transfers between planning and analytics to perform key analyses or check goal achievement. Some organizations perform this data exchange automatically, but this requires harmonized Master data, coordinated processes and sufficient resources to adapt and maintain the interfaces.

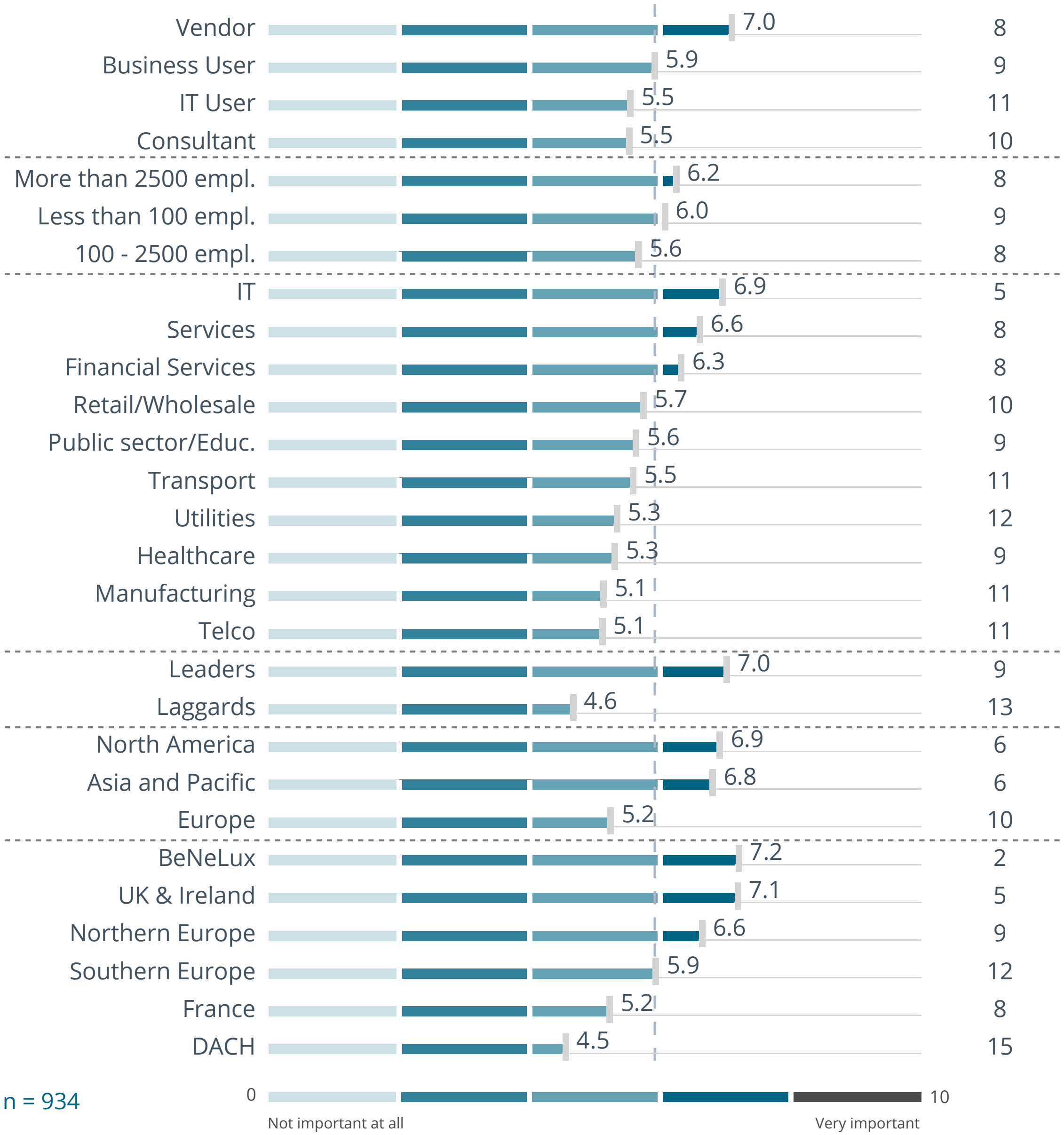
This area is undergoing rapid change. With the rise in popularity of Microsoft Power BI, several major vendors have chosen to integrate it directly with their data and planning models to provide secure, live real-time access from within the analytics tool. With the vendor doing most of the heavy lifting, it becomes easier for end users to use Power BI for integrated CPM analytics. Another path some vendors have taken is to make the analytics tool itself the CPM solution, collecting and writing back plan data to an existing database. This is another way to achieve the benefits of integrated CPM and analytics.

Being able to use the latest Business Intelligence (BI) and analytics tools with direct real-time access to performance management data is a valuable capability that we expect more companies to adopt. This includes planning data as well as actual data brought in through integrated financial consolidation.

Top 15 Trends in Detail

Cloud for CPM

New CPM solutions are predominantly implemented in the cloud. North America and the Asia-Pacific region are leading the way in cloud adoption.



Viewpoint

Cloud-based CPM software is rapidly becoming the preferred choice for many organizations, driven by its flexibility, scalability and cost efficiency. In recent years, several purely cloud-based CPM products have entered the market and gained significant traction. Vendors are accelerating this trend by discontinuing support for on-premises versions and focusing their innovation efforts on cloud solutions. This shift not only modernizes CPM infrastructure but also signals the industry's commitment to cloud-first strategies.

The benefits of cloud-based CPM are numerous. They include near-instant availability, no need for internal hardware, lower IT resource requirements and elastic use of cloud resources. These advantages are particularly valuable in dynamic times, where fast time-to-value and the ability to scale quickly are critical. Companies also recognize the cloud's ability to handle large data volumes efficiently, reducing costs and supporting data-driven decision-making.

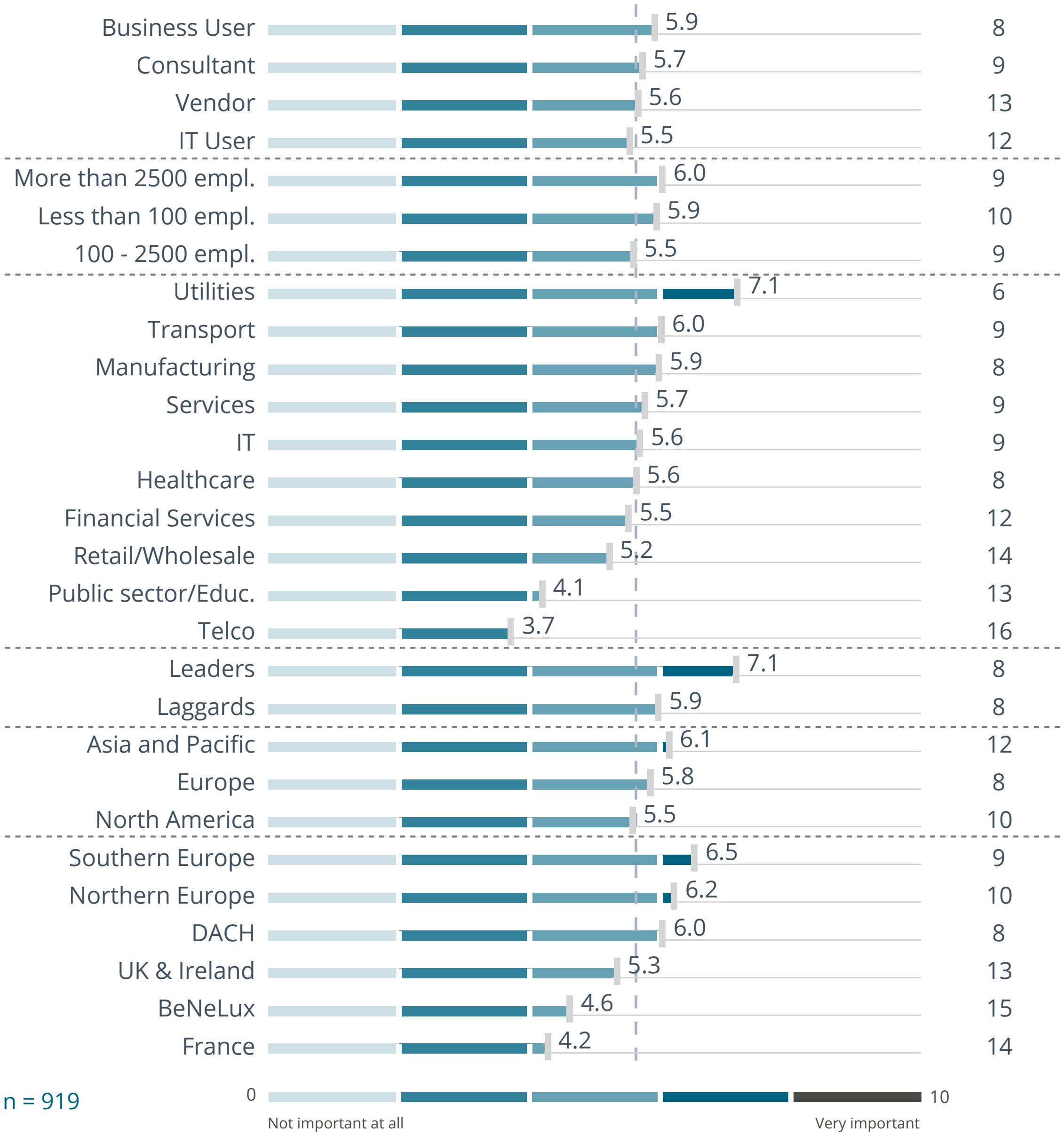
Despite these benefits, many organizations still rely on on-premises solutions, particularly in regions like Europe and the DACH area. Concerns about data security and compliance remain prevalent there. In contrast, North America and the Asia-Pacific region are leading the way in cloud adoption, driven by a more open approach to innovation and technology.

As cloud deployments become the norm for new CPM implementations, organizations must embrace this trend to remain competitive. Cloud-based solutions are no longer just an option. They are becoming the key to achieving agility, scalability and long-term success in a rapidly changing business environment.

Top 15 Trends in Detail

Unified Internal Controlling and External Accounting

Break down silos between internal controlling and external accounting for greater efficiency, improved data accuracy and more reliable decision-making



Viewpoint

Traditionally, internal controlling and external accounting have been considered separate domains within organizations. They often operate independently, using different processes, data sources and software solutions, and they maintain different views on data. This separation frequently results in inefficiencies such as time-consuming transfer calculations between internal and external data views, inconsistent data interpretations and redundant efforts to reconcile financial figures for internal management and external reporting.

The growing complexity of financial regulations and the increasing demand for transparency and real-time insights have made harmonizing these two areas a strategic priority. This is especially true for leading organizations. Modern CPM platforms support the integration of internal controlling and external accounting structures within a unified data model.

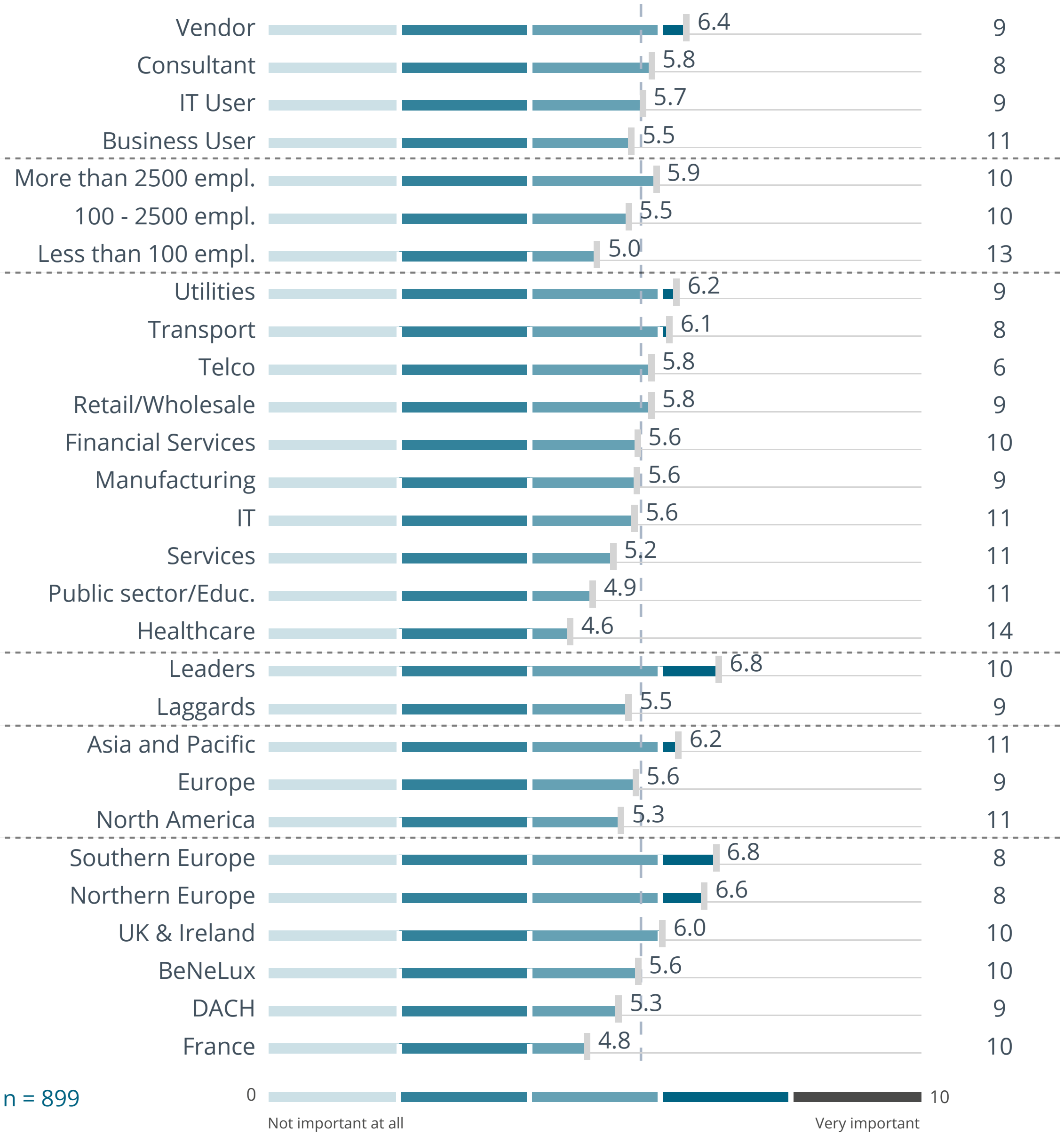
Companies that unify internal and external accounting within a single CPM platform benefit from a range of advantages. Linking planning and reporting structures with an integrated group view of the P&L, balance sheet and cash flow leads to faster closing cycles, reduced manual reconciliation efforts, improved data accuracy and a consistent single source of truth for both management reports and statutory financial statements. Aligning internal performance metrics with external reporting requirements also enables organizations to respond more effectively to stakeholder demands and regulatory changes.

Harmonization requires standardizing internal and external views and fostering collaboration between accounting and controlling teams. Integrated CPM platforms and harmonized data structures improve efficiency and give companies a competitive edge through more agile and reliable decision-making processes.

Top 15 Trends in Detail

Integrated Platforms for Consolidation and Group Accounting

Integrated CPM platforms for consolidation and group accounting successfully compete with ERPs and specialized third-party applications



Viewpoint

Financial consolidation is essential to combine the financial data of several legal entities in group financial statements. It eliminates inter-company transactions to accurately present the group's financial performance according to legal requirements, including consolidated P&L, balance sheet and cash flow statements. Preparing consolidated financial statements for all legal entities of a group is not only a financial and legal obligation, it also provides guidance for group-level decision-making and supports planning and controlling across the entire organization.

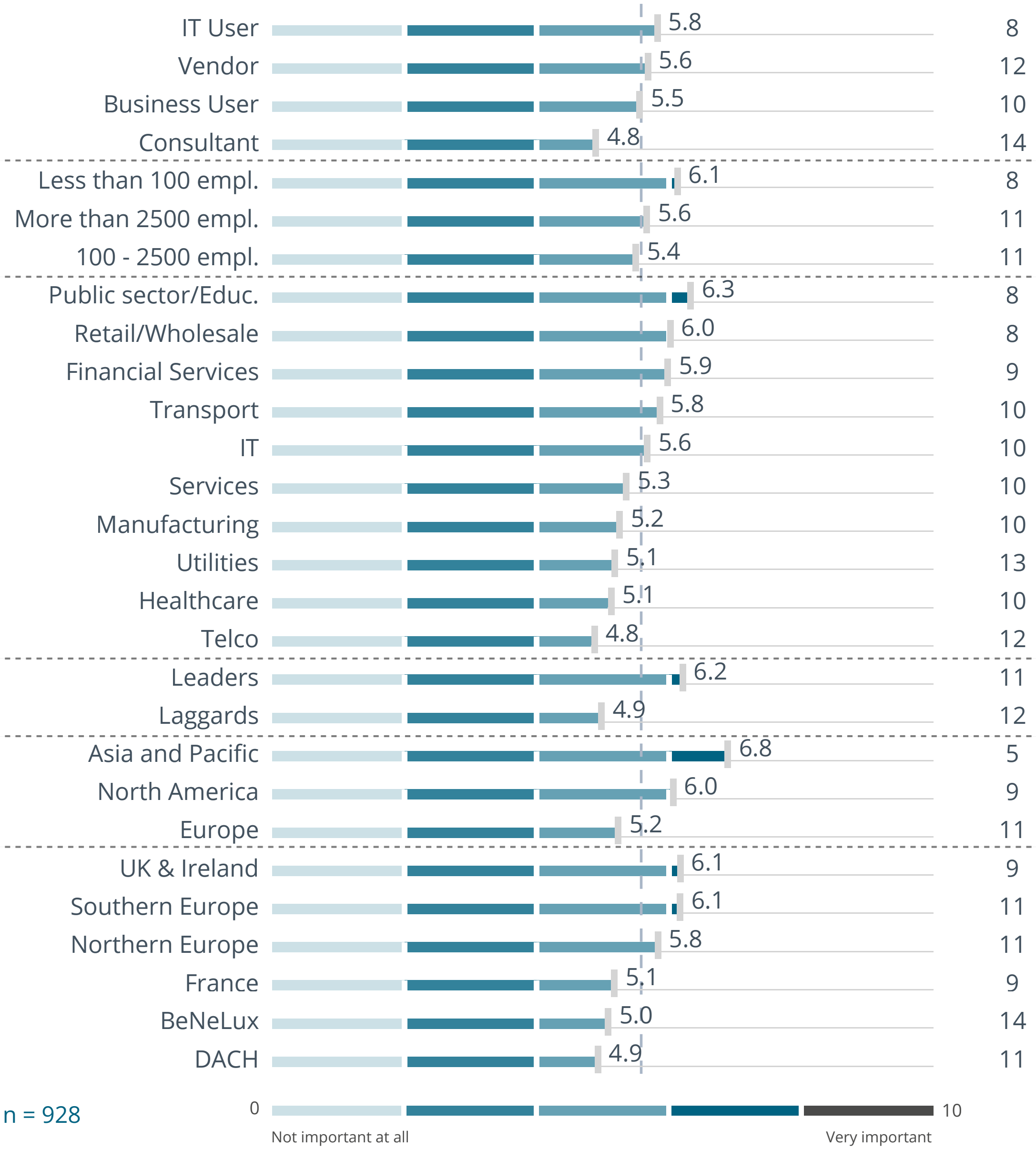
In recent years, several vendors have joined the ranks of leading CPM consolidation providers. They have either developed their own solutions or acquired existing consolidation tools and integrated them into their planning-focused CPM products. Where they still differ is in how they address group accounting use cases such as account reconciliation, lease accounting, disclosure management, tax accounting and Environmental, Social, and Governance (ESG) planning and reporting. Some vendors do not cover these areas with out-of-the-box functionality, others rely on integrated third-party solutions and some provide a full range of financial consolidation and group accounting capabilities.

This area ranks lower as a trend for a clear reason: end-user needs vary widely. Some organizations already have third-party tools for disclosure management or account reconciliation that they are satisfied with, even if an integrated CPM solution might reduce costs. Others only use CPM consolidation features for internal management reporting and do not need additional group accounting functions. Of course there is a group that does want a full suite of CPM financial consolidation and group accounting capabilities. All of them now have several vendor options to choose from.

Top 15 Trends in Detail

Risk and Compliance Management

Risk and compliance management is a growing priority in CPM. It helps organizations navigate uncertainty and maintain long-term resilience.



Viewpoint

Growing regulatory pressure and rising business volatility have pushed risk and compliance management to the forefront of CPM. Organizations must ensure financial and operational transparency, comply with evolving regulations and proactively identify and mitigate risks. CPM systems are increasingly addressing these challenges by integrating risk and compliance management into their core functionalities.

Modern CPM solutions now offer tools to automate compliance processes, monitor key risk indicators and ensure data integrity across planning, reporting and financial consolidation. These capabilities are essential for meeting stringent regulatory requirements such as General Data Protection Regulation (GDPR), Sarbanes–Oxley Act (SOX) and Environmental, Social, and Governance (ESG)-related disclosures. By embedding risk management directly into CPM workflows, organizations can align risk mitigation efforts with strategic and financial goals, enabling a more proactive and integrated approach.

The demand for such solutions is driven by increasing complexity in global operations, stricter regulatory scrutiny and the need for real-time insights. Advanced analytics and Artificial Intelligence (AI) further enhance these systems by identifying anomalies, forecasting potential risks and ensuring compliance through automated checks.

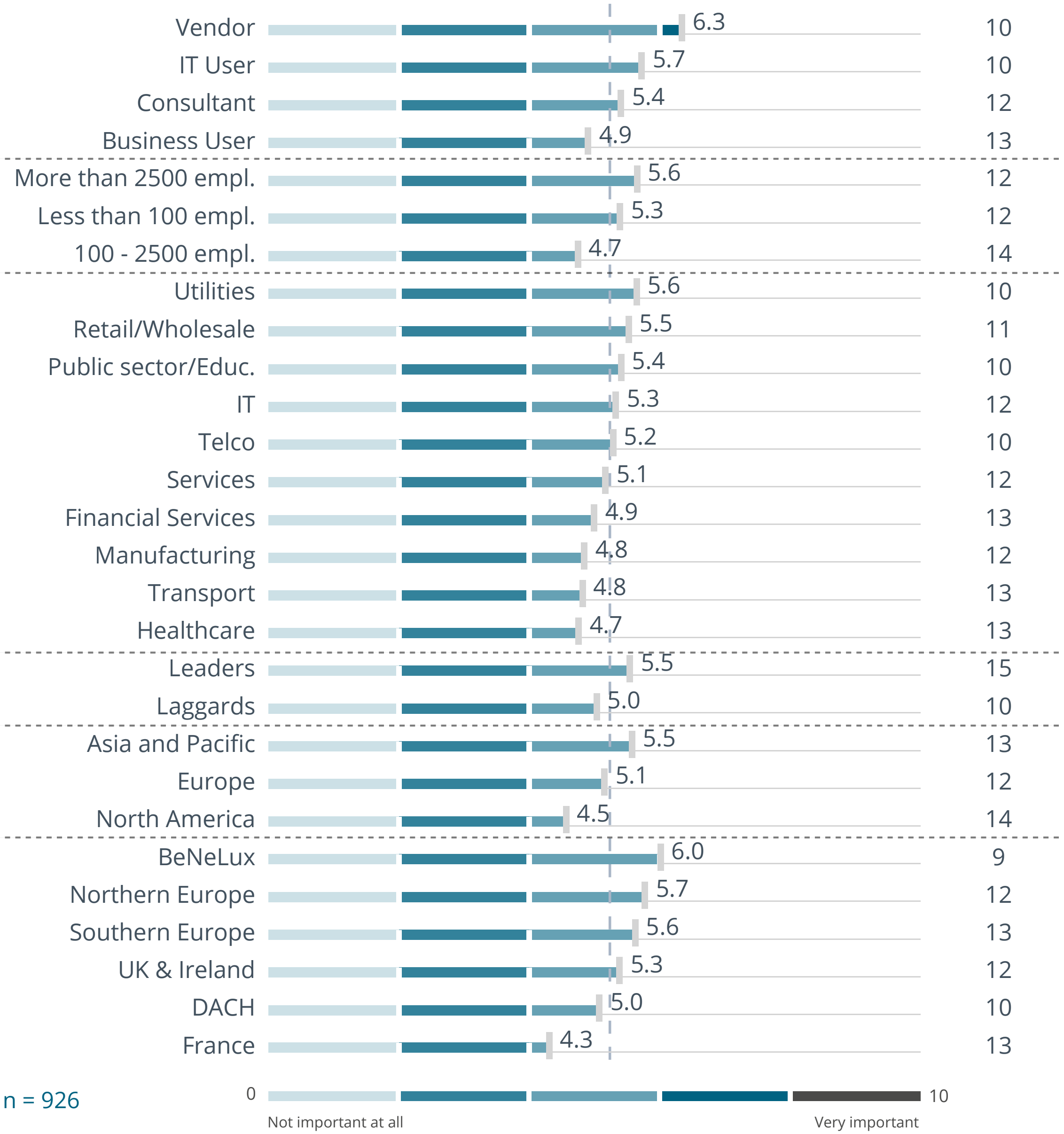
Regional differences remain, with industries like finance and healthcare leading adoption due to stricter compliance requirements. However, as more businesses recognize the value of integrating risk management into CPM, adoption is expected to grow across all sectors.

Risk and compliance management is no longer a standalone function. It has become a strategic pillar of modern CPM, enabling organizations to navigate uncertainty with confidence and maintain long-term resilience.

Top 15 Trends in Detail

AI / Machine Learning for CPM

Vendors have been leading the charge on AI, while user interest and adoption has lagged. That is starting to change.



Viewpoint

Artificial Intelligence (AI) has the potential to transform CPM by automating processes, accelerating decision-making and enabling organizations to analyze larger datasets with greater precision. By leveraging advancements in machine learning (ML), generative AI (see trend "Generative AI for CPM") and agentic AI, companies can build more agile, data-driven frameworks. However, despite its promise, AI adoption in CPM remains relatively low among surveyed companies, often due to security concerns, skepticism, a lack of clear use cases and insufficient data readiness.

Machine learning, often seen as traditional AI, analyzes data to identify patterns, detect anomalies and automate predictions. These capabilities help organizations respond quickly to market shifts, streamline forecasting while enhancing accuracy and improve efficiency by automating routine tasks. As a result, many companies are exploring the potential of AI and predictive technologies for CPM, especially in planning, budgeting and forecasting. Better quality of extrapolations and simulations, reduced manual workload for planners and easier identification and evaluation of key drivers are among the main benefits expected from AI. The goal of AI-based planning is to augment rather than replace human planners.

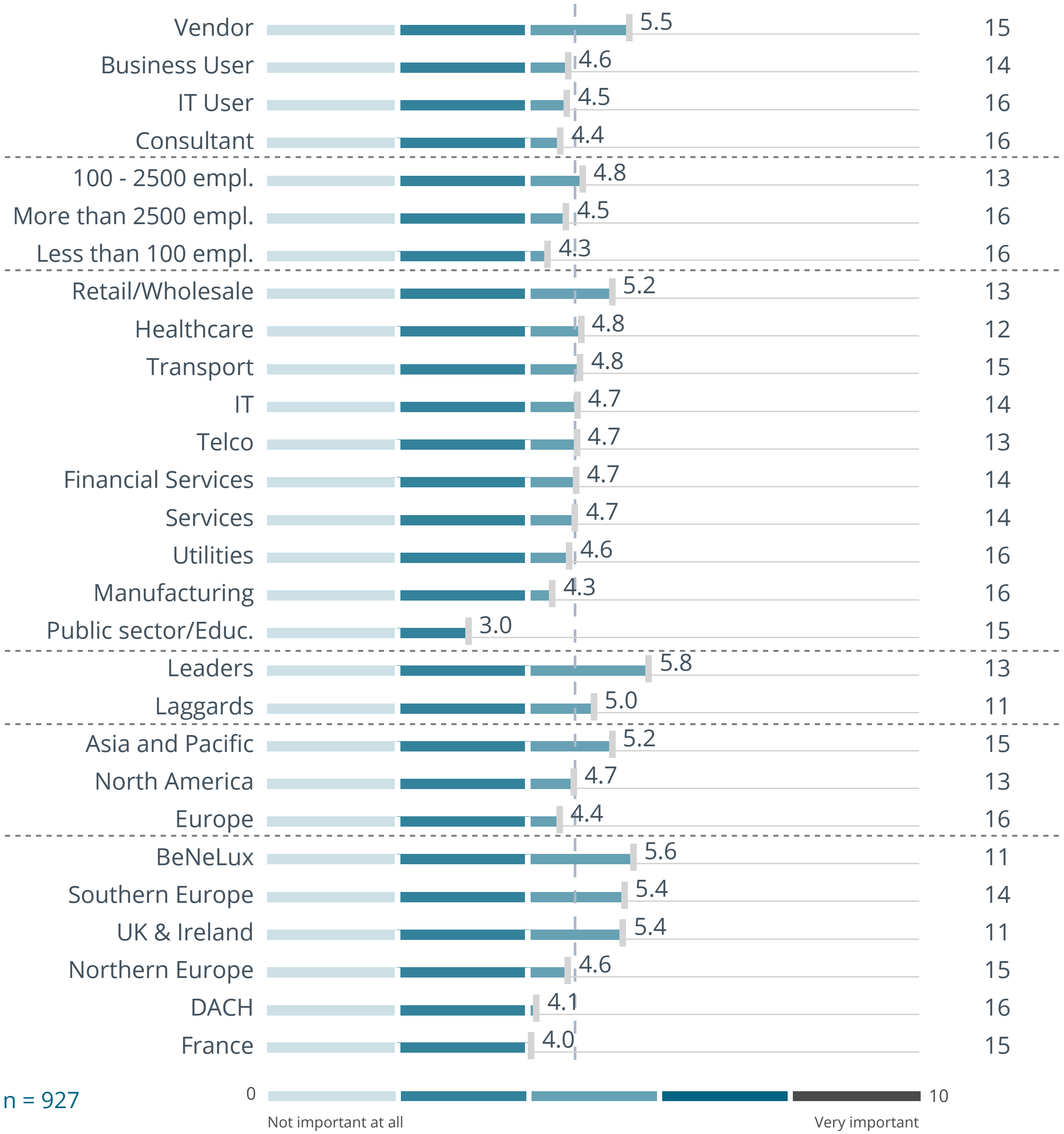
The next stage in the evolution of AI is agentic AI. These AI agents autonomously trigger workflows and optimize objectives, such as improving forecast accuracy or adjusting plans in real time. By acting proactively, AI agents make processes more adaptive and robust and often lead to significant productivity gains.

While widespread adoption of AI is still years away, organizations are increasingly exploring small-scale trials and evaluating AI capabilities in new CPM solutions. As AI continues to evolve, its integration into CPM will become a key enabler of agility, efficiency and competitive advantage.

Top 15 Trends in Detail

Prebuilt CPM Solutions

Prebuilt CPM solutions are beginning to gain traction for workforce planning, sales performance management, and supply chain planning and analysis



n = 927

Viewpoint

Predefined CPM solutions and planning applications are the next frontier for vendors to differentiate themselves. These solutions can save companies significant time and money in terms of implementation. While many appreciate the openness and flexibility of vendor offerings that lean more towards the platform end of the spectrum, these predefined solutions are often a better approach for business users who are less comfortable using a platform's tools to build their own solutions.

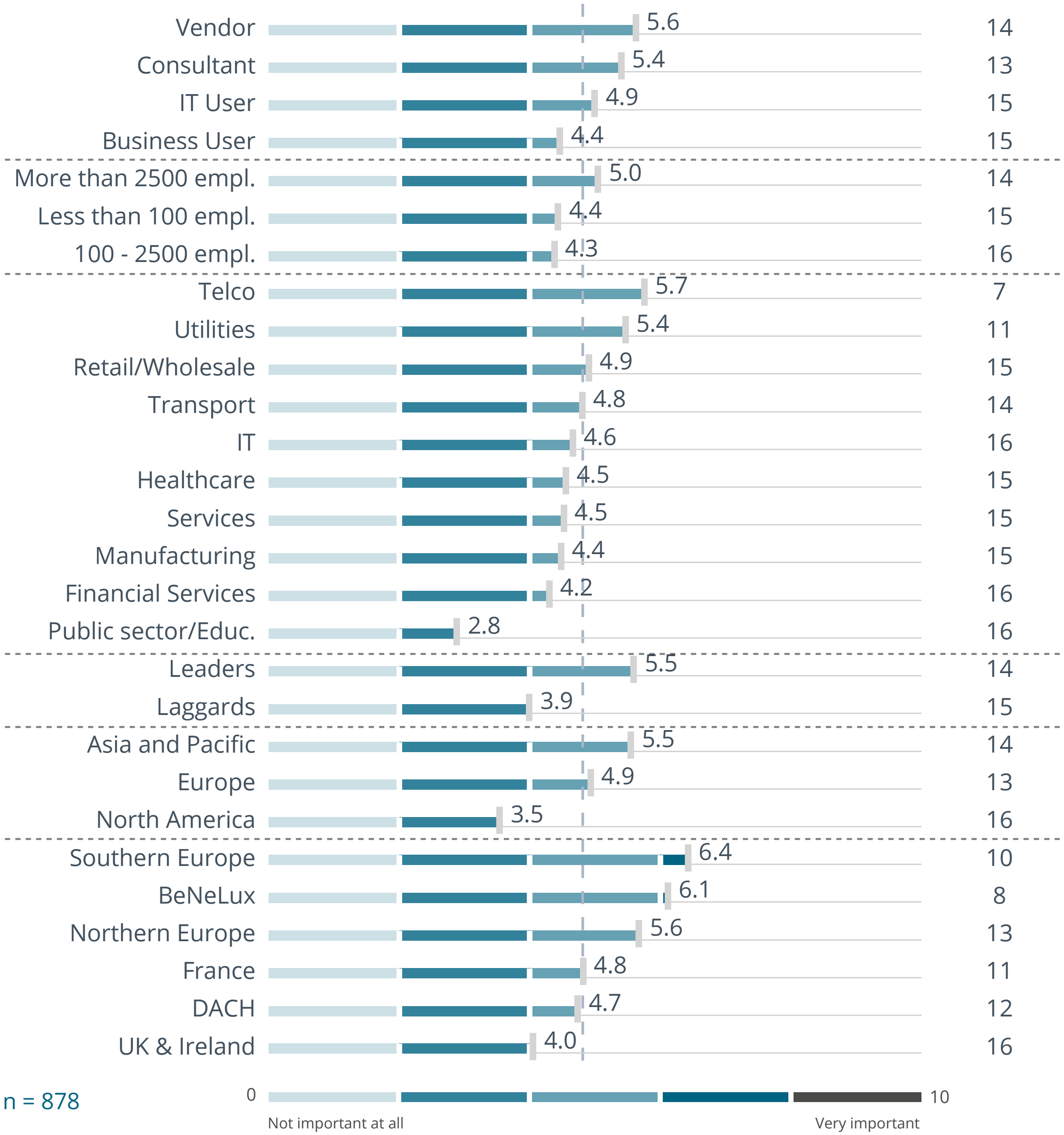
Built on top of a vendor's platform by the vendor or a partner, end users get the best of both worlds: the option to use the platform to address unique needs and predefined solutions for more universal needs (with configuration to personalize). In addition to shortening time to value, these solutions also incorporate vendor-determined best practices which should minimize errors and optimize performance. Today, predefined solutions are available for many operational areas, regulatory requirements and industry-specific use cases.

While predefined planning solutions currently have fairly low interest across the board, we believe that will increase in the future as more vendors roll out appealing options that address more and more use cases and fast time to value is an important requirement for companies. We also believe there is some hesitation tied to experience with earlier iterations of these solutions, which were fairly basic. Today, predefined planning solutions for areas such as sales performance management, supply chain planning, and workforce planning are beginning to gain traction.

Top 15 Trends in Detail

ESG Reporting and Performance Management

ESG reporting and performance management has evolved from a compliance-driven necessity to a strategic priority for organizations



n = 878

Viewpoint

Environmental, Social and Governance (ESG) reporting has evolved from a compliance-driven necessity to a strategic priority for organizations worldwide. Investors, regulators and stakeholders increasingly demand transparency on ESG-related metrics, making ESG and sustainability management a crucial part of CPM.

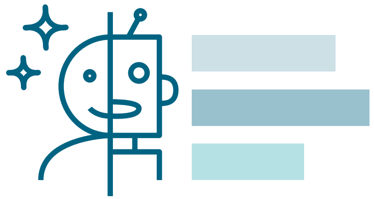
Modern CPM systems are now integrating ESG reporting and sustainability accounting into their core functionalities, enabling organizations to track, measure and report on sustainability initiatives alongside financial performance. These systems help consolidate ESG data from various sources and ensure compliance with frameworks like the EU Taxonomy, CSRD, GRI and more.

The growing focus on ESG is driven by regulatory pressures, investor expectations and the need to align business practices with societal and environmental goals. Companies that focus on ESG gain a competitive edge by demonstrating accountability, attracting sustainable investments and building trust with stakeholders.

However, challenges remain. Many organizations struggle with fragmented data, inconsistent reporting standards and a lack of integration between financial and non-financial metrics. Advanced solutions address these challenges by offering harmonized data management, automated reporting and analytics capabilities that link ESG performance to business strategy.

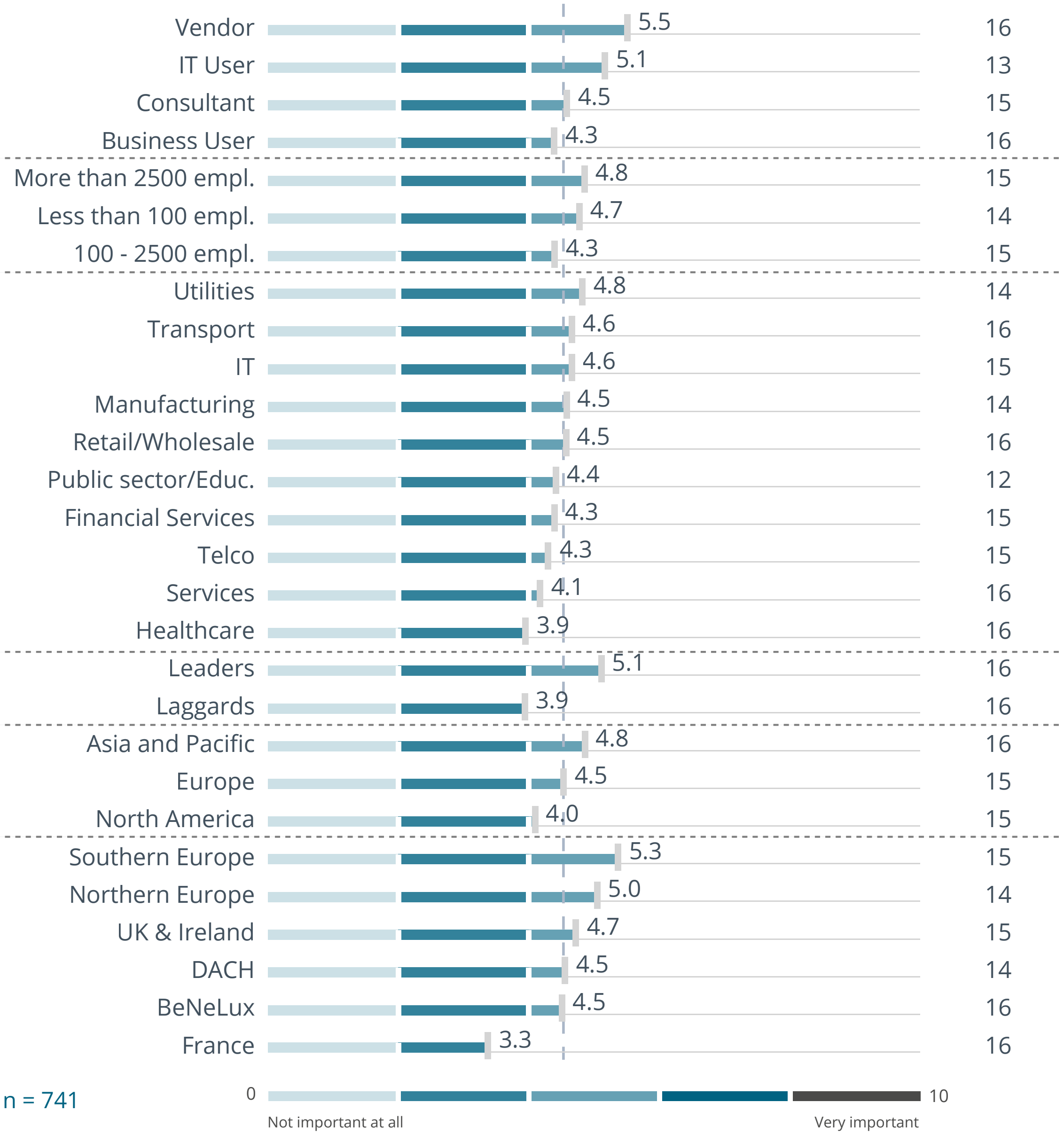
In certain regions there have been government policy changes and delays that have at least temporarily slowed down adoption. Still, as sustainability in general becomes a cornerstone of corporate strategy, organizations must prioritize integrated ESG performance management to ensure long-term resilience, compliance and sustainable growth.

Top 15 Trends in Detail



Generative AI for CPM

Generative AI makes CPM data and software more accessible by enabling natural language interaction and acting as a copilot for business users



Viewpoint

Generative AI, powered by advanced large language models (LLMs) like OpenAI's ChatGPT, Google's Gemini and Anthropic's Claude, has rapidly evolved over the past two years. Its ability to process and generate text, audio, video and other formats is revolutionizing not only personal interactions but also business operations, including CPM, by acting as a copilot for business users and planners.

In the CPM landscape, generative AI serves as an intelligent assistant, making data and software more accessible. Natural language queries allow users to analyze data, create dashboards and generate insights intuitively, reducing the need for technical expertise. For modelers, generative AI accelerates the development of adaptable planning solutions by generating and optimizing code, enabling faster and more resilient planning processes. Furthermore, generative AI extracts insights from unstructured data, such as competitor reports or market trends, thereby enhancing scenario planning and benchmarking capabilities.

Generative AI automates repetitive tasks, streamlines workflows and increases efficiency in data and analytics processes. However, its application in CPM is not without challenges. The risk of "hallucinations" (factually incorrect outputs) must be carefully managed by implementing robust data quality and governance frameworks that ensure reliable and trustworthy results.

As generative AI matures, its role as a copilot in CPM will transform how organizations plan, analyze and adapt. As a component of agentic AI solutions its usage will increase. This will empower leaders to make faster, smarter and more informed decisions in an increasingly dynamic business environment.

Recommendations

Recommendations

Amid increasing volatility and uncertainty, CPM has become a critical lever for effective business management. Yet many organizations face persistent challenges such as inefficiencies, excessive bureaucracy, lengthy cycle times and a lack of transparency in decision-making. Addressing these issues is essential to ensure that CPM delivers real value and supports agile, data-driven decision-making.

This study highlights key CPM trends that can help tackle these challenges and unlock new opportunities. Drawing on our survey findings, we provide actionable recommendations to help organizations embrace these trends and build more efficient, transparent and resilient CPM processes.

1 Boost Productivity with a Modern CPM Software

The right CPM software is essential for effective and efficient performance management. If your organization still relies heavily on Microsoft Excel or basic spreadsheets, transitioning to a modern CPM solution can deliver transformative benefits. These tools significantly improve accuracy by reducing errors, streamline planning, closing and reporting cycles, and increase ease of use and user satisfaction. Most CPM solutions still allow access via Excel for specific use cases, leveraging the familiarity and expertise already present in most organizations.

For many companies, especially laggards, Excel remains the default tool for CPM and particularly planning. Yet its limitations are clear. Without an underlying database or advanced functionality, Excel cannot meet the demands of fast-changing, data-driven markets. The result is inefficiency, user frustration and limited business value.

If you are using a legacy on-premises solution, you should also consider transitioning to a modern cloud-based solution. Benefits include cloud elasticity, access from anywhere and immediate availability of the latest innovations.

Modern CPM solutions offer integrated data management, advanced functionality such as scenario modeling and rolling forecasts, and intuitive interfaces that empower business users. They also improve collaboration and ensure consistent, reliable data across the organization.

By adopting a dedicated CPM solution, your organization can reduce manual effort, respond more quickly to change and unlock greater efficiency and business value. Investing in modern and integrated platforms has become essential to remain competitive and resilient.

2 Prioritize Robust Data Management to Unlock CPM's Full Potential

Effective data management is the foundation of successful CPM. To thrive in a data-driven world, organizations must treat data as a strategic asset. This means focusing on key areas such as integration, quality, security and governance to ensure reliable and consistent data across all CPM processes.

Integrating data from disparate systems is the first step. Bringing together data from ERP, CRM, data warehouses and other systems creates a single source of truth for planning, financial consolidation, reporting and BI. Harmonizing Master data across divisions fosters a unified understanding, enabling consistent reporting and accurate decision-making. Automation tools for data cleansing and reconciliation further enhance efficiency and reduce manual errors.

Strong Data governance is equally important. Clearly defining roles, responsibilities and processes ensures data security, compliance and long-term quality. A solid governance framework builds trust among business users and creates the foundation for advanced technologies such as Artificial Intelligence and Machine Learning.

By prioritizing robust data management, organizations can unlock the full potential of their CPM systems. High-quality data fosters agility, drives innovation and enables informed decision-making, which is essential for gaining a competitive edge in an increasingly complex environment.

Recommendations

3 Achieve Better Decisions Through Full Integration in CPM

Integration is the cornerstone of modern CPM and data-driven corporate management. There are multiple levels and dimensions of integration that organizations need to consider.

To unlock its full potential, all relevant CPM processes must be connected. This includes financial and operational planning, internal and external reporting, analysis and financial consolidation, as well as adjacent use cases such as ESG reporting. Integrating CPM with AI and advanced analytics enables predictive insights and scenario modeling for better decision-making. Integrating financial planning with statutory consolidation ensures consistent data flows between management and legal reporting, reducing errors and improving confidence in the numbers.

Integration within CPM processes is equally important. Connecting strategic, financial and operational planning into a unified process is a central pillar of corporate management. Strategic planning feeds high-level goals into financial plans to set targets, and operational plans such as sales, supply chain and workforce plans ensure the traceability and validity of financial results. This holistic integration enables organizations to adapt quickly to changing conditions while maintaining alignment across all planning levels.

Unified software platforms that support these integrations offer significant advantages. They reduce manual effort, improve data quality and accelerate decision-making. Additional benefits include breaking down silos, reducing the number of systems in use along with their associated license, subscription and maintenance costs, and shortening onboarding times as employees only need to learn one system. When selecting a CPM solution, organizations should prioritize platforms that offer comprehensive functionality, seamless integration and flexibility to support a wide range of performance management needs.

4 Build Resilience in CPM to Navigate Uncertainty and Volatility

Resilience in CPM, especially planning, has become essential in an environment of heightened uncertainty and constant disruptions. Static, traditional approaches cannot keep pace with rapid change and unexpected events. Companies must adopt agile approaches to adapt quickly, maintain continuity and make informed decisions even in volatile conditions.

Resilient CPM relies on agile and dynamic planning, forecasting and simulations to set and adjust goals. Scenario analyses and contingency plans allow organizations to simulate alternative futures, assess risks and prepare for significant events. This proactive approach reduces the need for reactive, ad hoc decisions made under time pressure and limited information. A risk-oriented planning framework that incorporates uncertainties and probabilities helps businesses prepare for disruptions while identifying opportunities amid uncertainty. Continuous forecasting allows organizations to base decisions on the most current information, using real-time actuals as the forecast foundation.

Modern CPM software is a key enabler of resilience. With flexible in-memory processing engines, these tools allow companies to run complex simulations, adjust plans rapidly and tailor solutions to their needs without constant IT involvement. They combine speed, flexibility and reliability to support robust decision-making.

By prioritizing resilience in CPM, organizations can strengthen their ability to adapt to change, maintain strategic direction and gain a competitive edge, even in the face of crises and disruptions.

Recommendations

5 Harness AI to Transform CPM Efficiency and Insights

AI is a game-changer for CPM, offering the potential to streamline processes, reduce workloads and provide deeper insights. Machine Learning (ML), Generative AI and Agentic AI are redefining how organizations plan, analyze and adapt in dynamic environments.

To unlock AI's full potential, companies must first build a strong data foundation. High-quality, consistent and comprehensive data is essential for training AI models and ensuring reliable outcomes. Without this foundation, even the most advanced AI capabilities will fall short. Optimizing data quality not only benefits AI but also supports scenario analyses, simulations and further automation of CPM processes.

A holistic AI strategy is essential for long-term success. Start with easy-to-implement use cases such as predictive forecasting or natural language interactions to build expertise and gain quick wins. Generative AI copilots can simplify user interactions by enabling intuitive tasks like modeling, scenario creation and data insights through natural language. Meanwhile, AI agents represent the next stage of automation, proactively handling routine tasks and workflows to free up resources for strategic decision-making.

Evaluate your CPM software's AI capabilities to ensure they align with your organization's needs. Interactive, user-friendly solutions supported by generative AI and AI agents are critical for driving efficiency and fostering user adoption. Particularly when dealing with financial data, the vendor's AI must be secure, transparent, trustworthy and auditable. By embracing AI strategically, organizations can future-proof their CPM processes and maintain a competitive edge.

6 Go Beyond Technology: Build CPM Excellence Through Processes and People

Achieving excellence in CPM requires more than just implementing the right software. Processes, methodologies and organizational alignment are equally critical to ensuring that CPM delivers real value to the business.

Technology provides the foundation, but its effectiveness depends on well-designed processes and skilled employees. New methods often require different software, while advanced software enables more efficient processes. However, software alone cannot solve performance management challenges. It must be supported by an agile and flexible organizational framework.

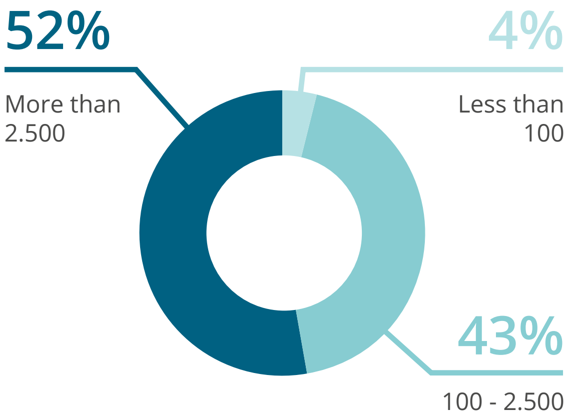
A key factor in CPM success is CPM literacy. Employees need a strong understanding of CPM processes, methods and data, as well as skills in modeling, Artificial Intelligence (AI), Business Intelligence (BI), analytics and technology support. Investing in training and education empowers staff to make better use of tools and apply CPM concepts effectively. This is crucial for operational success and to drive informed decisions. A lack of skills remains one of the most significant barriers to progress.

To maximize value, organizations must optimize technology, processes and structures in a coordinated way. Isolated improvements may yield short-term benefits, but only an integrated approach can drive sustainable performance management excellence. By focusing on people, processes and technology equally, organizations can unlock the full potential of CPM to support informed, data-driven decision-making.

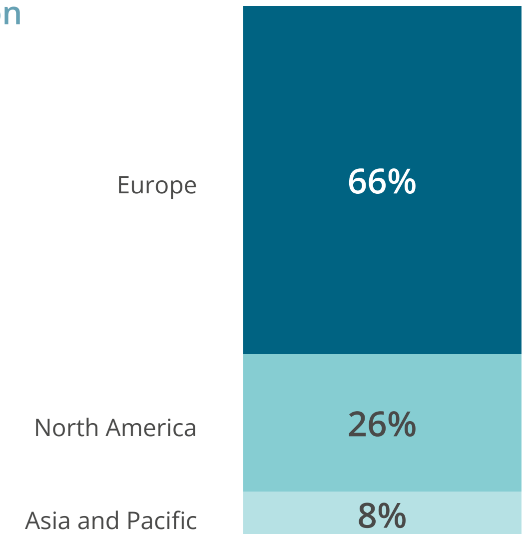
Methodology

Demography

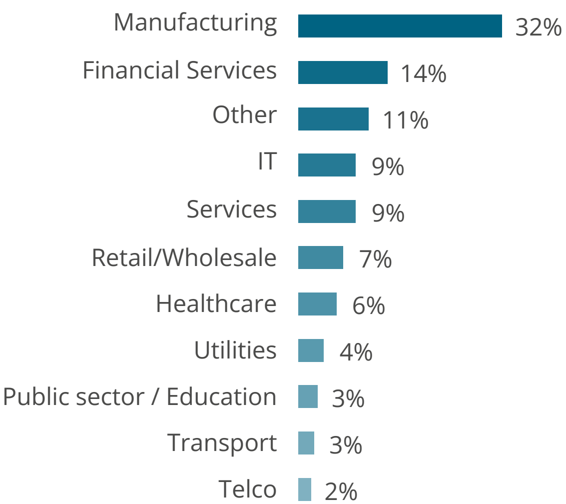
Number of Employees



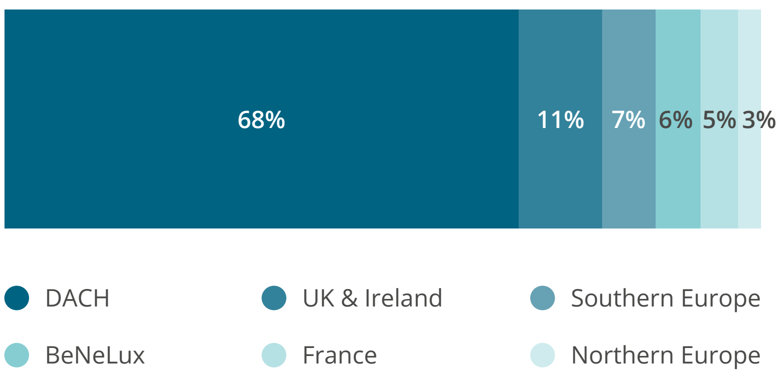
Region



Industry



European Countries



Information on the Survey

The data for the CPM Trend Monitor 2026 was sourced from three surveys: the BARC Planning Survey 25, the BARC Financial Consolidation and Group Accounting Survey 25 and the 2025 BPM Pulse research study. These global online user surveys were conducted worldwide. BARC and BPM Partners promoted the surveys on their websites, at events and in their email newsletters.

After data cleansing, 989 survey responses remained. Respondents came from a wide range of industries, company sizes and regions. The majority of respondents are from Europe, though a significant percentage are also from North America.

Company Profiles

About BARC

Data Decisions. Built on BARC.

BARC is a leading analyst firm for data & analytics and enterprise software with a reputation for unbiased and trusted advice. Our expert analysts deliver a wide range of research, events and advisory services for the data & analytics community. Our innovative research evaluates software and vendors rigorously and highlights market trends, delivering insights that enable our customers to innovate with data, analytics and AI. BARC's 25 years of experience with data strategy & culture, data architecture, organization and software selection help clients transform into truly data-driven organizations.

Research

BARC user surveys, software tests and analyst assessments in blogs and research notes give you the confidence to make the right decisions. Our independent research gets to the heart of market developments, evaluates software and providers thoroughly and gives you valuable ideas on how to turn data, analytics and AI into added value and successfully transform your business.

Consulting

The BARC Advisory practice is entirely focused on translating your company's requirements into future-proof decisions. The holistic advice we provide will help you successfully implement your data & analytics strategy and culture as well as your architecture and technology. Our goal is not to stay for the long haul. BARC's research and experience-founded expert input sets organizations on the road to the successful use of data & analytics, from strategy to optimized data-driven business processes.

Events

Leading minds and companies come together at our events. BARC conferences, seminars, roundtable meetups and online webinars provide more than 10,000 participants each year with information, inspiration and interactivity. By exchanging ideas with peers and learning about trends and market developments, you gain new impetus for your business.

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About BPM Partners

Guiding Finance to Performance Management Success

BPM Partners is the leading independent authority on business performance management (BPM/CPM/EPM) and related business intelligence and AI solutions. 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. Utilizing a comprehensive, rapid, and cost-effective methodology vendor-neutral experts guide companies through their BPM initiatives from start to finish while both reducing risk and minimizing costs. BPM Partners has specialized packages that lead clients through project justification, finance transformation, requirements definition, vendor selection and deployment of departmental or enterprise-wide systems.

Research and Events

We are the authors of the Performance Management Vendor Landscape Matrix, the most comprehensive analyst report covering this market. We present the annual Pulse of Performance Management webcast in conjunction with IMA (Institute of Management Accountants) that reviews major trends and key vendors. BPM Partners also conducts the annual BPM Pulse Research Study which gathers data for project benchmarking and detailed vendor customer satisfaction ratings. BPM Partners also shares its research in an annual Buyers Guide for Budgeting and Planning Solutions, and also one for Financial Consolidation and Reporting.

Expertise

The people of BPM Partners each have on average 25+ years experience in the space. We were a founding member of the BPM Standards Group, an industry group dedicated to accelerating the successful adoption of BPM across the enterprise by providing clear and consistent definitions, frameworks, best practices, and implementation roadmaps. BPM Partners has provided its expertise to organizations such as APQC (American Productivity & Quality Center), TDWI (The Data Warehousing Institute), CFO Magazine, TechTarget, IndustryWeek, Business Finance, Information Management, AFP (Association for Financial Professionals), IMA (Institute of Management Accountants) and other leading finance and technology focused publications and conferences. We have been recognized by Consulting Magazine as one of seven 'Small Jewels of Consulting', by CFO Tech Outlook as a Top 10 Performance Management Consulting Company, and by Forbes as one of America’s Best Management Consulting Firms.

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Sponsor Profile

Sponsor Profile

About Prophix

Prophix® is a global leader in financial performance management, empowering finance teams to lead with clarity, capacity, and confidence. From planning and budgeting to forecasting, reporting, reconciliation, and consolidation, Prophix brings it all together in one intelligent platform.

Prophix One™, the flagship Autonomous Finance Platform, combines AI, automation, and intuitive technology to simplify complex work and elevate finance to a more strategic role. By automating routine tasks, delivering predictive insights, and enabling real-time collaboration, Prophix empowers finance teams to focus on driving business growth.

Prophix provides a comprehensive set of solutions, including:

- **Financial Planning & Analysis**
  Gain clarity in every plan with AI-powered budgeting, forecasting, and analytics that deliver accuracy and precision. Adapt quickly, optimize cash flow, and make confident decisions with ease.
- **Close and Consolidation**
  Increase capacity with automated consolidations, eliminations, and reconciliations that accelerate the financial close. Streamline processes, reduce errors, and redirect valuable time towards driving strategic initiatives.
- **Reporting and Analytics**
  Gain confidence in every decision with AI-powered insights that uncover trends, mitigate risks, and identify opportunities in real time. Prophix One Agents deliver the clarity and confidence needed to lead with strategy.

With nearly four decades of innovation and a global footprint spanning more than 3,000 customers in over 100 countries, Prophix is recognized as a trusted partner in financial performance management across industries such as manufacturing, construction, and healthcare. By enabling finance teams to operate with greater agility, Prophix helps organizations strengthen financial resilience and drive sustained business performance.

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