

Alteryx for Reality-Based Planning

Connect tax, regulatory, and operational realities to forecasts — before surprises reach the board.

With Alteryx One, Baker Tilly cut tax data processing time by 50% and reduced errors in regulatory reporting by 70% giving tax teams the accuracy and speed to inform planning decisions before they're made, not after. ➤

The Planning Gap in Modern Finance

FP&A teams are under pressure to forecast faster, reforecast more often, and deliver scenario insight that actually reflects how the business operates. But most planning models still run on assumptions that ignore two of the biggest variables affecting outcomes: tax and regulatory constraints.

Tax impacts get estimated after decisions are made. Regulatory limits are interpreted informally and adjusted manually. External indicators rarely make it into the model at all. The result is a plan that looks credible on paper but breaks down during review leading to costly revisions, eroded board confidence, and an FP&A team that feels perpetually behind.

Solution

Alteryx helps Finance teams connect tax, regulatory, and operational data to planning models through governed, repeatable workflows yielding forecasts that reflect reality before they reach leadership, not after.

With Alteryx One, FP&A, Tax, and Compliance teams can automate data preparation, encode regulatory constraints as structured inputs, model tax impacts across scenarios, and refresh forecasts without manual rework. Regulatory and tax changes flow into planning models automatically, keeping scenarios current without rebuilding logic from scratch each cycle. The result is a planning function that moves with the business, delivers more defensible numbers to leadership, and spends less time on fire drills and more time on the decisions that matter.

Common Challenges

- Tax impacts arrive too late to influence strategic decisions
- Regulatory constraints are applied manually and inconsistently
- FP&A and Tax operate on different data and timelines
- Scenario models do not reflect realistic after-tax outcomes
- Mid-cycle forecast revisions create rework and credibility risk
- Planning assumptions rely on memory rather than structured inputs

How Alteryx Works with Your Existing Stack

ERP and tax systems

Alteryx automates extraction and transformation of tax-relevant data from ERP, subledger, and compliance systems, producing clean, standardized inputs that feed both provision workflows and planning models without manual re-keying.

Planning and EPM tools

Alteryx prepares the data before it enters your EPM or planning platform. Reconciled actuals, tax-adjusted drivers, and scenario-ready inputs flow into your existing models with consistent logic, reducing preparation time and increasing model reliability.

Regulatory and compliance data sources

Alteryx converts unstructured regulatory content including policy bulletins, rate tables, and jurisdiction-specific rules into structured constraint inputs that FP&A can apply directly to scenarios. Constraints are encoded once and reused every cycle.

High-Value Reality Based Planning Use Cases

Tax-Aware Scenario Planning

Most scenario models optimize for EBITDA or revenue without accounting for how tax exposure changes across options. Alteryx One enables Finance teams to blend operational, financial, and tax data into a single modeling environment. Teams can evaluate how location choices, capital investments, or pricing strategies affect effective tax rate and cash taxes before decisions are made. AI-assisted analysis helps surface the scenarios with the highest after-tax impact, making it easier to present trade-offs clearly to leadership.

Regulatory Constraint Integration

Regulatory requirements — capital thresholds, concentration limits, jurisdictional caps — rarely find their way into planning models until a review flags a problem. Alteryx helps teams convert unstructured regulatory content into structured constraint tables that can be applied systematically across scenarios. When rules change, analysts update the constraint, not the entire model. The result is a planning process that is both faster and more defensible.

Tax Law Change Monitoring and Impact Modeling

Tax law changes arrive continuously and their downstream effects on forecasts are rarely understood quickly enough. With Alteryx, teams can build standardized impact models that translate a rate change, deduction modification, or new jurisdiction requirement into a quantified financial effect within hours. FP&A can incorporate those impacts into rolling forecasts before they create surprises at month-end or in board review.

Automated Provision Data Preparation

Provision calculations depend on clean, consistently mapped inputs from across the organization. Alteryx automates the extraction, mapping, and validation of provision-relevant data from ERP, subledger, and operational systems enabling application of applying entity-specific rules in repeatable workflows. Tax teams spend less time on data cleanup and more time on analysis, with full audit trails that satisfy both internal and external review.

Cross-Functional Forecast Alignment

Forecast accuracy breaks down when Accounting, FP&A, and Tax are working from different versions of the same data. Alteryx creates a shared data layer where reconciled actuals, tax-adjusted drivers, and compliance inputs flow into planning models from a single governed source. Each function operates on consistent definitions and timely data, eliminating the reconciliation disputes and mismatched assumptions that typically surface during review cycles. The result is a faster, more confident planning process — and a forecast that all three functions can stand behind when it reaches the CFO or the board.

Where Results Come First

Fewer mid-cycle surprises

Integrate tax and regulatory inputs before plans are finalized, not after.

Faster scenario modeling

Encode constraints as reusable parameters and refresh scenarios in hours, not days.

More credible board reporting

Deliver forecasts that have been stress-tested against tax and regulatory realities.

Governance and auditability built in

Every data transformation, constraint, and mapping is documented in repeatable workflows that leadership and auditors can trace and verify.

What Alteryx Provides

- Governed workflows to connect ERP, tax systems, and planning tools
- Automated data preparation for provision and compliance inputs
- Structured constraint tables derived from regulatory and policy sources
- Scenario modeling with tax-adjusted drivers and parameterized logic
- Repeatable impact models for rapid tax law change analysis
- Cross-functional data layer shared by FP&A, Tax, and Compliance
- AI-assisted summaries that surface key drivers across scenarios
- Audit-ready lineage and documentation at every workflow step