

Anaplan for Finance

Financial Planning and Consolidation

Unify your financial planning and consolidation



Ready to break down the siloes between actuals and plans? Many finance teams struggle with disconnected consolidation and planning processes, leading to delayed close cycles, inconsistent reporting, and misalignment between actuals, forecasts, and plans.

Without connecting these critical processes, data discrepancies, compliance risks, and inefficiencies pile up. It's time for a smarter, end-to-end solution that finance can own and maintain themselves — one that supports your unique business needs instead of limiting them.

There's a better way to plan, record, and report

Connect your consolidation and planning processes. Only Anaplan delivers best-in-class solutions for both — linking planning, budgeting, and forecasting (PB&F), and financial consolidation on a unified platform to put the power back in the hands of your finance teams. Our financial planning and consolidation solution delivers real-time alignment, faster close cycles, improved accuracy, and greater agility so you can make confident, data-driven decisions and ensure financial performance excellence in an ever-evolving business environment.

Key benefits

Boost agility: Instantly assess the impact of changes on consolidated results with dynamic scenario planning. Finance teams can fully own and manage their models, unlike other solutions that require IT or third-party support.

Improve accuracy and real-time alignment: Ensure forecasts and budgets reflect the latest consolidated actuals for more informed decision-making. Our customers have reported up to a 20% improvement in forecast accuracy.

Reduce risk and improve compliance: Maintain a single source of truth to reduce reconciliation errors, enable a full audit trail, and promote regulatory compliance.

Increase finance team efficiency by up to 40%: Free your finance teams from manual tasks so they can focus on strategic insights that optimize decision-making and drive profitable business growth.

Cut close and reporting time by up to 90%: Automate intercompany eliminations, currency translations, reporting, and more to reduce manual work and accelerate consolidation.

Accelerate time to value: Harness our prebuilt, cloud-based solutions for planning, consolidation, and reporting. Get best practices, calculations, and templates out-of-the-box that are backed by a powerful, flexible platform that are configurable to your business needs and can quickly scale to support growth.

Leverage conversational AI: Quickly extract insights and deepen analysis into your financial data with our AI-infused application that significantly reduces time-to-value.

Top finance leaders plan with Anaplan

ABInBev



Coca-Cola

DAIKIN

Deloitte.

JLR

L'ORÉAL

servicenow

unum®

Solution details

End-to-end financial management

- Drive finance excellence with cloud-based, purpose-built solutions for both consolidation and planning
- Empower finance to move faster with low-code/no-code model setup, maintenance, and updates — no IT required
- Increase enterprise-wide collaboration with a unified user experience
- Streamline data workflows with enterprise-ready, native data integration, transformation, and management using Anaplan Data Orchestrator (ADO)



Financial Consolidation and Reporting

- Easily consolidate financials across entities, currencies, and standards to accelerate accuracy and compliance
- Integrate new acquisitions, manage currency conversions, generate instant cash flow statements, and more — all within a Microsoft Office environment
- Deliver precise financial and narrative reports with real-time data integration using our Excel add-in and Disclosure Management capabilities to empower informed decisions and stakeholder confidence
- Connect with ERPs, general ledgers, and financial and operational systems across subsidiaries and regions, regardless of chart of accounts or fiscal years, mapping them to a corporate standard

Finance Planning Transformation

- Streamline financial planning across your enterprise, from corporate to business units
- Gain a single source of truth for financial planning across the income statement, balance sheet, and cash flow statement for complete visibility into your projected financial condition
- Provide transparency into revenue, operating expense, headcount expense, capital planning, and long-range planning
- Streamline and automate your planning process for seamless access to actuals and detailed insights
- Harness our conversational AI assistant, Anaplan CoPlanner, for deeper insights and analysis*

The Anaplan platform offers

- **“What if” scenario and multi-dimensional modeling**, powered by our high-performance calculation engine, producing ultra-fast calculations at unprecedented scale.
- **True out-of-the box calculations, logic, and rules that go beyond templates and starter kits** to handle the complexity of your consolidation and reporting process.
- **Built-in dashboards, reporting, and analytics** with data visualization providing a comprehensive view on financial position.
- **Collaborative and agile planning, consolidation, and reporting** across the enterprise from corporate to business units.
- Best-in-class **security and compliance** with role-based access control, user management, and SSO support with SAML 2.0 compliance, and data encryption.
- **A highly extensible ecosystem** — collect and analyze data in a single location using APIs, ETL connectors, and built-in integrations with other solutions.

*Some information in this document may have product roadmap that is intended to outline our general product direction and is provided for informational purposes only.

About Anaplan

Anaplan is the only scenario planning and analysis platform designed to optimize decision-making in today's complex business environment so that enterprises can outpace their competition and the market. By building connections and collaboration across organizational silos, our platform intelligently surfaces key insights — so businesses can make the right decisions, right now.

More than 2,500 of the world's best brands continually optimize their decision-making by planning with Anaplan.

To learn more, visit www.anaplan.com

