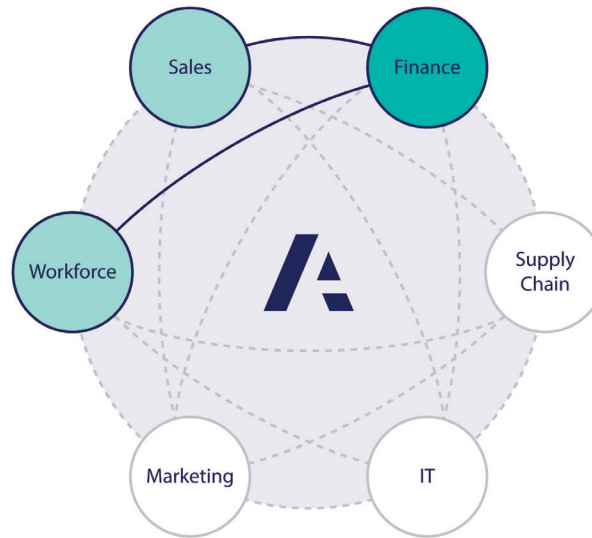# Planning, budgeting and forecasting

Finance is expected to do more with less, producing greater detail with fewer errors, and in less time. Standalone spreadsheets and complex systems only add to the pain. You need structure, speed, consistency, collaboration, and accuracy in your financial planning process. With Anaplan's planning and budgeting app, you can create and connect business user-friendly plans and formulas with financial and operational drivers at scale and across your entire enterprise.

Create connected plans fast. . Get your planning basics done quicker, more accurately, and with less effort across plans, budgets, forecasts, and reports all in one connected system. Anaplan links financial, sales, and operational plans together for seamless big-picture financial planning and analysis across your enterprise.

Model any scenario, dimension and time. Easily build and compare scenarios that represent your business: aggressive, conservative, "what-if," and more. Create unlimited dimension hierarchies and lists, model changes with drag-and-drop and no code-writing or batch wait time required. Plan by any time bucket: day, week, month, and year.

Flexible driver-based plans and forecasts. Plan and forecast with financial and operational drivers that matter. Design models to include nuances of goods, services, subscription, license, and other business models. Build plans on which you can collaborate and answer complicated questions in real time, so you can take immediate action for point-of-impact results.

Key Benefits

- Reduce cycle time and effort of planning, budgeting, and forecasting

- Take control and own the process, eliminating dependence on spreadsheets and IT

- Drive a collaborative "big picture" with connected plans across finance, sales, operations, and HR

- Increase accuracy and target achievement with driver-based models, real-time calculations, and automatic rollup across plans and reports

- Increase plan precision with broad collaboration and point-of-impact participation

- Seamlessly align the strategic plan, the corporate plan, the annual budget, and the periodic forecast with both top-down and bottom-up methodologies.

- Jumpstart time-to-implementation through pre-built accelerator apps for planning, budgeting, forecasting, consolidation, and reporting

pandora

Pandora Radio, a music streaming and automated music recommendation service, uses Anaplan to manage its complete FP&A solution in the workspace, including long-range planning, monthly reporting, financial reports, and workforce planning.

Benefits

- Increased collaboration across departments with a cloud-based solution

- 100% business self-service where users, not IT or consultants, manage development

- Easily expanded toolset to coincide with growth of company and market

"
Anaplan allows us to work with the flexibility that Excel offers but in a structured manner so that we can collaborate on a model in real-time."

Jared Waterman

VP of Financial Planning and Analysis

Pandora

∧naplan

Key features

Planning, budgeting, and forecasting
- Enterprise cloud planning for strategic and corporate plans, annual budgets, and forecasts
- Driver- and assumption-based plans for consistent alignment organization-wide
- Role-based, secure access for relevant plan entry, clear accountability, and informed decisions • Plan by any time bucket—day, week, period, year
- Plan and report across multiple currencies
- Break-back entry shortcut (historical, seasonal, 4-4-5) for fast, accurate plan calculation and update

Top-down and bottom-up
- Dynamically cascade strategic plans by key dimensions to align plan, budget, and forecast
- Build budgets bottom-up while viewing targets to improve collaboration and reduce iterations

Versions and scenarios
- Multiple versions for comparison, with centralized control for consistent versioning company-wide
- Unlimited scenarios for proactive comparative insight and better choices

Flexible, user-owned business rules
- Simple, real-language formula creation—no coding
- Drag-and-drop for different hierarchy rollups, adding new currencies, changing chart of accounts, updating business rules—no dependence or burden on IT

Modeling, analysis, and "what-if"
- Easily create complex models and "what-if" scenarios on-the-fly that answer complicated financial questions and span multiple areas of the business

Revenue planning and forecasting
- Plan revenue for any business and connect sales, service, and other revenue-driving areas to create more accurate financial plans and forecasts
- Flexibly support changing revenue recognition standards required during planning stages
- Leverage 15+ unique revenue models in the Revenue Planning App (units, services, SaaS, and more)

Personnel planning
- Plan for headcount at group, role, or individual level to drive the details important to your business
- Split, transfer, and adjust headcount across hierarchies (business units, regions, projects)
- Automate key calculations (FICA, FUTA), benefits, and salaries for fast, accurate, consistent plans

CAPEX planning
- See real-time impact of capital plans across P&L, balance sheet, and cash flow
- Plan by different depreciation methods and payment plans

Other forecasting—rolling forecasts and cash-flow
- Make rolling forecasts with a simple "copy" function
- Support for cash-flow forecasting to model cash-in-and-out impact of decisions before they are made

Key features of the Anaplan platform

Open data integration with Anaplan HyperConnect powered by Informatica Cloud, APIs, and ETL services through MuleSoft, Dell Boomi, and SnapLogic.

Best-in-class **security and compliance**, with role-based access control, user management, SSO support with SAML 2.0 compliance, and data encryption.

Data and metadata management uses Business Map, which visually captures the relationships and interconnectedness between data and plans to help business users and IT administrators manage their planning landscape.

Lifecycle Management provides precision and control while streamlining the design, development, testing, and delivery of planning models and forecasting scenarios.

Application integration provides easy access between Anaplan and third-party apps. For example, **Tableau visualization and analytics**, driven by Anaplan data, enables informed decision-making. **DocuSign integration** enables users to send, track, and sign documents securely and efficiently.

About Anaplan

Anaplan is the leader in Connected Planning. Our purpose-built software powered by our patented Hyperblock engine enables dynamic, collaborative, and intelligent planning. Large and fast-growing companies worldwide use our solutions to connect the people and data required for trusted plans and accelerated decisions essential to leading in their markets. Based in San Francisco, we are a privately-held growth company with 20 offices, 175 expert partners, and more than 850 customers worldwide. To learn more, visit anaplan.com.

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