



# Financial Planning and Analysis for Utilities



As an FP&A leader in the utilities sector, you are tasked with navigating volatile, uncertain market dynamics, regulatory changes, and sustainability goals while ensuring long-term financial performance. With Anaplan corporate and business unit FP&A, you can drive enterprise-wide alignment and accountability across strategic plans, performance metrics, and scenarios that reflect the true state of your operations – from energy generation, transmission and distribution to their financial impacts. Enhance business partnerships and operational efficiency at scale by centralizing planning and reporting and fostering collaboration across the business.

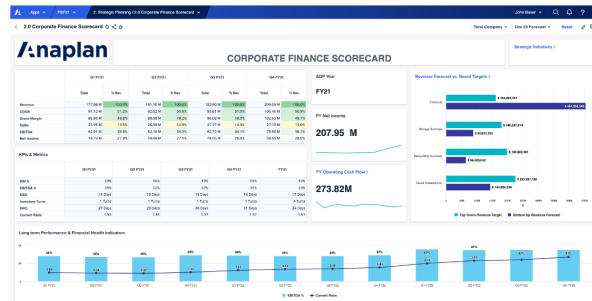
## Key benefits

**Enterprise line-of-sight and flexibility:** Extend your insights across the enterprise and effectively manage financial and operational performance at scale, linking long-range plans, budgets, and forecasts across all business units and segments.

**Scenario modeling and predictive forecasting:** Quickly ingest internal and external data sources to intelligently forecast the future, and create scenarios to navigate changes in regulation, market conditions and customer behavior with greater accuracy.

**Centralized planning and reporting data:** Seamlessly consolidate data from disparate internal and external data sources to execute with a high-fidelity, responsive and unified source of truth for enterprise financial performance and planning.

**Ownership and accountability:** Collaborate effectively and partner more strategically to increase productivity, understand future financial implications and achieve targeted business outcomes.



**Streamline management reporting and analytics:** Tell the story behind the numbers with visually engaging dashboards and board-ready reports to quickly align on the facts and take action. Collaborate with multiple contributors and dynamically link data to confidently share with stakeholders.

## Transform how you see, plan, and lead your business

Are you ready to create and dynamically test multiple scenarios to drive revenue growth, improve operational efficiency, and optimize asset utilization across your utility operations?

Gain confidence in your plans and forecasts by integrating your teams, data, and strategies into one centralized platform. Anaplan offers a real-time, business-owned planning and reporting environment tailored to meet the unique modeling needs of FP&A while supporting the stringent regulatory requirements and standardized processes of the utilities industry.

## CUSTOMER STORY



### 33% faster annual budgeting

As a renewable energy developer experiencing rapid growth in the Asia-Pacific region, Vena Energy needed a platform that enabled it to consolidate hundreds of business entities and build annual budgets more efficiently. The company turned to Anaplan to transform its processes. Today, Anaplan supports rapid growth by giving planners the detailed, historical data they need in a fraction of the time to power better business performance:

- Monthly consolidations are complete in days
- Annual budgets are built in weeks – instead of months
- Dozens of capital projects are monitored with precision

#### Results:

- 33% faster annual budgeting
- 80% time-savings in monthly consolidations
- 300+ business entities share one financial planning platform

“With Anaplan, we have a complete and accurate picture of our capital projects, no matter where they are in development.”

**Sam ong**

Chief Finance Officer, Vena Energy

## Solution details

### Improve accuracy and build alignment with your business strategy

- Align long-term strategic plans with financial targets, regulations, and operations across energy generation, transmission, and distribution.
- Distribute goals across divisions (e.g., T&D and customer service) and support iterative planning.
- Track performance against targets and adjust plans quickly for regulatory changes, demand shifts, or infrastructure needs.
- Deliver real-time P&L and liquidity insights in the context of new capital investments or infrastructure reorganizations.

### Establish a path forward with scenario modeling and analysis

- Develop “what-if” analyses to assess the impact of key drivers such as energy demand shifts or interest rate fluctuations.
- Easily model multiple scenarios to make fast, informed decisions in response to unexpected disruptions such as extreme weather events.
- Analyze the trade-offs of investments in renewable energy, grid modernization, or new technologies to optimize costs and improve efficiency.

### Optimize opportunities with intelligent forecasting

- Harness advanced analytics and external data, such as weather patterns, to drive accurate insights with AI and ML technology.
- Identify key drivers (e.g., grid maintenance and fuel costs) and build dynamic calculations to improve revenue and expense projections.
- Aggregate data across multiple divisions while adjusting hierarchies to analyze changes in business performance.

- Enable flexible, detailed rolling forecasts to quickly adapt to shifts in energy consumption.

### Drive effectiveness and efficiency across planning processes

- Enable business partners to contribute to budgets and forecasts on a collaborative platform with integrated workflows.
- Build and maintain financial models directly to reduce IT dependence and allow analytics to focus on data analysis.
- Ensure transparency for compliance and audit teams with detailed business maps, audit logs, and robust user and data management.

### Support seamless data integration and drive user adoption

- Leverage data from transactional systems to feed budget and forecast models.
- Integrate with upstream or downstream systems, including ERP, HRM, and CRM, using pre-built connectors or self-service import/export options.
- Rely on audit history to monitor model changes and activity.

### Deliver up-to-the-minute reporting with confidence

- Quickly refresh and distribute reports to support decisions on capital investments, regulatory compliance, and operational strategy.
- Use integrations with Microsoft Office, Tableau and Power BI to increase productivity and efficiency.
- Support self-service reporting with drill down into rich data to analyze plan detail and assumptions.

## About Anaplan

Anaplan transforms the way you see, plan, and lead your business. By dynamically connecting financial, strategic, and operational plans in real time, Anaplan gives you the power to anticipate change, address complexity, and move at market speed. Anaplan’s Connected Planning platform lets you view and contextualize current performance, forecast future outcomes to fuel growth and mitigate risk, and optimize costs so you can make faster, more strategic decisions. Anaplan helps more than 2,400 market-leading customers in over 50 countries navigate their daily planning challenges with confidence.

To learn more, visit [Anaplan.com](https://www.anaplan.com)

## The Anaplan platform offers

- **“What if” scenario and multi-dimensional modeling**, powered by our patented Hyperblock<sup>®</sup> calculation engine, producing ultra-fast calculations at unprecedented scale so you can anticipate market changes.
- Built-in dashboards, reporting, and analytics with data visualization providing **a single source of truth** on business performance.
- **Collaborative and agile planning** across Finance, Operations, Supply Chain, HR, Regulatory, and other business units.
- Best-in-class **security and compliance** with role-based access control, user management, 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.

**Anaplan**