

# Finance Planning Transformation

Drive enterprise value with connected finance



Today's finance leaders face a dynamic business environment marked by constant change like shifting market trends, disruptive technologies, and evolving customer demands, requiring organizations to be more agile and proactive than ever before. The challenge is heightened by complex business structures, diverse products and associated risks, and disparate datasets. Traditional planning methods involving spreadsheets and manual data entry hinder responsiveness to market volatility and uncertainty. Isolated planning efforts and fragmented systems of different business units also lead to limited collaboration, misalignment and inaccuracies with corporate plans.

By connecting finance teams and adopting a unified platform, you can streamline financial planning and analysis for quicker, more accurate decisions driving stronger outcomes.

## There is a better way to plan

Our comprehensive planning, budgeting, and forecasting solution seamlessly integrates diverse data sources, incorporating crucial business drivers and market factors into your plans. It enables dynamic scenario modeling for optimal decision-making. A unified perspective of corporate strategic and business unit plans is crucial for effective resource and risk management and driving revenue growth and profitability. By staying ahead of the curve, finance can navigate uncertainties and seize opportunities for success.

## Key benefits

- **Fuel growth with agile, more accurate financial planning:** Extend insights across the enterprise and effectively manage financial and operational performance by linking plans, budgets, and forecasts from corporate targets to all business units, geographies, products, and segments.
- **Streamline costs to enhance margins:** Manage operating expenses closely with access to real-time financial information. Connect strategic and financial planning to operational execution for optimized costs and increased profitability.
- **Mitigate risk proactively:** Integrate internal and external data sources for comprehensive analysis. Forecast the future and model scenarios to evaluate the best options while navigating changes in regulations, market conditions, and customer behavior accurately.
- **Align planning and reporting data and information:** Seamlessly connect data from disparate systems to create a single source of truth for corporate and business unit (BU) financial performance reporting and planning with both top-down and bottom-up approaches. Eliminate reliance on spreadsheets and IT.
- **Foster collaboration for informed decisions:** Improve productivity and build partnerships across finance teams. Enhance understanding of root causes and future financial implications, enabling objective decision-making.

## CUSTOMER STORY

### MARKEL

A Fortune 500 diverse financial holding company principally focusing on specialty insurance but also owning a portfolio of product- and service-based businesses. Markel wanted to assess, predict and reduce risk and created an end-to-end financial planning environment that dramatically increased the efficiency of its finance professionals, enhanced its ability to grow as its business environment evolves, and established a foundation for an engaging, diverse, and flexible workplace.

## CHALLENGES

- Siloed data and disparate systems prevented timely and reliable financial plans for quick and easy updates in response to volatile market conditions.
- Inflexible systems and complicated UX of prior solution limited real-time capabilities and human errors.
- Disconnected global and business unit operations could not support the standardized needs of corporate and unique requirements of unique businesses.

## RESULTS

With Anaplan, Markel realized these results:

- Reduced planning cycle time from 18 weeks to seven — means plans are converted to action faster.
- 6,000 hours saved annually by the finance department are now available for higher value activities.
- Increased transparency of financial plans enhances and accelerates strategic decision-making.

## Anaplan for Finance use cases

### Long-range planning

- Craft strategic financial plans that drive action and align with long-term goals.
- Foster collaboration across finance teams, building partnership and ownership.
- Harness the power of scenario planning to model market conditions and seize opportunities while mitigating potential risks.

### Revenue planning

- Develop robust and comprehensive revenue forecasts by leveraging historical data, market trends, customer insights, and competitor analysis.
- Gain granular insights by drilling into business units, products, regions, or customer segments.
- Analyze multiple possibilities and accommodate executive requests with real-time “what-if” scenarios.

### Opex planning

- Take control of operating expenses with meticulous cost plans and uncover opportunities for optimization.
- Utilize driver-based planning to accurately model the impact of business decisions on expenses.

- Enhance cash flow management by ensuring timely payments and maintaining a keen awareness of cash flow, ensuring financial obligations are met.

### Headcount planning

- Harmonize headcount costs with your strategic vision by crafting data-driven headcount expenses.
- Tailor planning at various levels of granularity to cater to the unique needs of corporate and business units.
- Harness the power of “what-if” scenarios to effectively manage costs and optimize staffing decisions, considering factors such as location, salaries, benefits, and reporting structures.

### Capital planning

- Strategically prioritize capital expenditures by evaluating their value and return on investment.
- Empower yourself with scenario modeling to make informed decisions and invest in projects that deliver maximum impact.
- Stay on top of project performance in real time to ensure they remain within budget and on schedule, ensuring successful outcomes.

## Key features

### Experience the power of Finance Planning Transformation:

- Enhance planning accuracy, alignment, and trust in finance by accessing real-time data and fast insights and linking and aligning corporate and BU plans and objectives.
- Conduct quick scenario modeling and analysis to inform strategic decisions, assess risks, and optimize performance.
- Optimize growth opportunities with intelligent forecasting using no-code financial models, advanced analytics, and dynamic rolling forecasting.
- Drive efficiency in planning processes by reducing IT dependence and streamlining finance processes.
- Deliver up-to-the-minute executive/board reporting with confidence with fast refresh and self-service visualization.
- Our customers have seen up to a 20% improvement in forecast accuracy, up to a 2% increase in EBITDA, and up to a 40% increase in productivity for finance.

### 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://anaplan.com).

## The Anaplan Platform Offers

- **What-if scenario and multi-dimensional modeling** that's powered by our patented Hyperblock™ 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 the enterprise from corporate to business units and across functions and operations (finance, sales, supply chain, HR, and marketing).
- **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.

The Anaplan logo features a stylized white 'A' icon followed by the word 'anaplan' in a lowercase, sans-serif font. The background of the logo area is a gradient of blue and green.