



# Connected Planning drives stronger results for capital market firms



## Navigate market complexities with confidence

Today's capital market firms face a myriad of challenges including economic volatility, changing regulations, heightened client expectations, and fierce competition. Capital market firms also find themselves in a data arms race, unable to leverage all the data at their disposal to unlock a competitive edge and increase returns.

To navigate these disruptions and stay ahead, you need agile business planning to drive growth, improve liquidity, and minimize risk during market volatility. Traditional business planning is a time-consuming, manual process that relies on dozens of spreadsheets and disconnected point solutions that struggle to keep pace with today's quickly evolving business landscape. Having quality and real-time data to do scenario modeling on-the-fly empowers you to make informed decisions and offers you a competitive advantage whereas traditional planning tools are unreliable, error-prone, and unscalable for your business.

Anaplan puts the planning process on a single platform unifying your data, people, and plans so you can make faster and more confident decisions to minimize risk and drive results. Eliminate data siloes and move away from outdated and disparate planning tools. Anaplan connects your financial, sales/distribution, operational, and workforce plans to provide you with real-time data visibility, "what-if" scenario modeling, intelligent forecasts, and harmonious performance coordination across your enterprise.

Now is the time to embrace Connected Planning to drive stronger performance for your firm. Many of your competitors have already done so—waiting is no longer a viable option.

### CUSTOMER STORY



Copenhagen Infrastructure Partners

#### Copenhagen Infrastructure Partners achieved:

- 87% faster reporting puts better information in leaders' and investors' hands.
- Distributed data aggregation increases speed and accuracy.



**With Anaplan, we can look at 25,000 scenarios in combinations.” ”**

Kristina Kolchedantseva,  
Senior Financial Associate, CIP



## FINANCE

### Agile and dynamic planning is essential for success

Effective financial planning is paramount to drive the success of products and services offered by capital markets firms. To achieve this, you need a planning tool that lets you analyze and glean insights from real-time data, model different scenarios to assess opportunities and risks, and adjust your strategies quickly to take advantage of ever-evolving market conditions.

**Anaplan for Finance** allows you to lead your business performance dynamically, collaboratively, and intelligently. Anaplan takes you beyond basic budgeting, linking advanced drivers and models to financial and operational plans across finance, sales/distribution, operations, and HR. Finance teams can align overall corporate objectives with financial plans that factor in market events and operational tactics, resulting in finance transformation that has a tangible and competitive impact:

- Improve modeling and forecasting capabilities for asset/fund management portfolios at a granular level and across many dimensions including fee calculations and cost allocations.
- Deliver real-time AUM roll-forward forecasting.
- Conduct ad-hoc scenario modeling and analysis to determine the best path forward.
- Confidently predict and plan for today and the future with embedded statistical and AI/ML-based forecasting.

## SALES & MARKETING

### Faster and more effective go-to-market strategies to boost returns

Increasing client expectations requires capital markets firms to adopt creative sales/distribution and marketing strategies. To succeed in today's rapidly changing environment, capital markets firms need to effectively formulate sales/distribution plans and revenue forecast while also balancing talent and compensation strategies.

**Anaplan for Sales & Marketing** provides you with the visibility into the drivers of sales performance and the tools you need to develop a connected revenue strategy. A comprehensive view of the commercial drivers across the firm helps keep go-to-market activities aligned and provides you with the intelligence and agility needed to increase returns.

- Enable better planning and modeling of incentives and rewards to ensure financial advisors' goals are aligned with organizational strategy and linked to profitability.
- Design balanced, equitable territory plans that capitalize on market opportunity.
- Increase sales forecast accuracy to improve visibility into target and quota attainment.
- More easily manage complex crediting scenarios to ensure correct compensation of financial advisors.

## Capital Markets Planning

Start your Connected Planning journey with Anaplan to help your capital markets firm connect top-down financial planning with business units and different operations to optimize asset utilization and effectively manage AUM, operating costs, and risk to deliver on expectations of stakeholders.

**F** = Financial Transformation

**HR** = HR & Workforce

**S** = Sales Performance Management



### HR & WORKFORCE

## Optimize your workforce and enhance business outcomes

Talent scarcity and cost pressures are just some major challenges faced by HR leaders at capital markets firms. By recruiting and investing in the right workforce, you can deliver the best service and highest value to your clients while accelerating your overall financial objectives.

**Anaplan for Workforce Planning** provides HR, finance, sales, operations, and business leaders with a single, accurate view of the organization's workforce, capacity, and human capital costs. It allows you to collaboratively plan and optimize your workforce strategy, identify headcount and talent shortages, model detailed "what-if" scenarios to close gaps, assess financial impact, and respond swiftly when you need to make the appropriate short- and long-term decisions for your talent processes and programs:

- Gain greater transparency into headcount, skillsets, and workforce costs across your entire organization.
- Better model and forecast compensation packages and their impact to profitability.
- Bring agility to developing and pivoting workforce plans.
- Design forward-looking talent strategies that are aligned to your firm's goals and budget.
- Create a more robust talent strategy, allowing you to manage the shift in talent and plan for future of workforce and skills.

## 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 the speed of the market. 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 2,200 market-leading customers in over 50 countries navigate their daily planning challenges with confidence.

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