

Reap better outcomes with Connected Planning for Professional and Business Services firms



Navigate market complexities with confidence

Do more with less. That is the environment that professional and business services face today, not only internally but from their own clients. Talent shortages, increasing client expectations, pricing pressures, and market volatility are just some of the many challenges keeping professional and business services leaders up at night.

You need agile business planning to stay one step ahead. The traditional planning process is time-consuming and manual and uses dozens of spreadsheets to extract data from multiple systems. Lacking accurate, real-time data also makes traditional planning unreliable and error prone. This could lead to myriad of issues including decreased revenue, missed billable hours, and more.

Anaplan puts the entire planning process on a single platform and unifies your data, people, and plans, empowering you to make informed decisions quicker thereby accelerating outcomes. By eliminating data siloes and severing ties with outdated and disparate planning tools, Anaplan connects your financial, operational, sales, and workforce plans to give you real-time data visibility, 'what-if' scenario modeling, intelligent forecasts, frictionless collaboration, and harmonious coordination across your enterprise so you can confidently navigate market conditions to drive growth.

Now is the right time to consider Connected Planning to drive growth at your firm. Many of your competitors have already done so — waiting is no longer a feasible option.

CUSTOMER STORY

By integrating sales with finance, LegalZoom has improved sales results, set the stage for more B2B activity and international expansion, and built a solid foundation for company-wide Connected Planning.



CUSTOMER STORY

Reduced time spent to complete monthly close from 15 days to just eight, and data processing that once took two days is now done in minutes.



FINANCE

Agile planning is critical for financial success

Achieving a healthy financial position requires maximizing talent utilization, growing revenue, improving client satisfaction, and mitigating risks. To realize this, you need a planning tool that lets you quickly analyze and harness insights from real-time data, perform what-if analysis to evaluate opportunities and risks, and adapt your strategies to take advantage of 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, 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.

- Optimize project planning with AI/ML-based forecasting to better estimate billable hours, revenue by project, and more.
- Conduct ad-hoc scenario modeling and analysis to establish the best path forward.

- Improve capacity and utilization planning to better plan staffing, billable hours, and utilization by projects, roles, and regions.
- Support seamless data integration and user adoption.
- Deliver up-to-the-minute reporting with confidence.



SALES & MARKETING

Robust go-to-market strategies to drive growth and solve your clients' toughest problems

To win and retain market share, professional and business services firms need to deliver an extremely high level of client service while looking for new ways to acquire clients and grow revenue within their existing accounts. To achieve this, sales leaders must accurately forecast project demand, measure sales performance, and determine optimal sales capacity.

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 enterprise helps keep go-to-market activities aligned, keep sellers motivated, and provides your organization the intelligence and agility need to drive revenue and sales performance.

- Design, model, and optimize your go-to-market plans using a single data hub.
- Set transparent quotas interlocked across business units and services to drive accountability and performance.
- Uncover the revenue potential of existing accounts, new segments, and the sales capacity needed to hit your numbers.
- Create incentive, bonus, and pay for performance programs that drive motivation and retain top talent.
- Track sales performance and forecast sales and demand, with a commitment to sales excellence.

HR & WORKFORCE

Optimize your workforce and boost productivity

Effective workforce planning is critical given the highly complex, specialized nature of your work. You must attract and retain skilled professionals by balancing work culture and compensation to avoid costly disruptions, provide skills development and training, and stay on top of new technologies and changing regulations.

Anaplan for Workforce Planning provides finance, HR, sales, operations, and business leaders with a single, accurate view of your firm's workforce skills, capacity, and human capital costs. It lets you collaboratively plan and optimize your workforce strategy, identify talent shortages, model detailed "what-if" scenarios, and respond swiftly to make the right short- and long-term decisions for your talent programs.

- Gain transparency into headcount, skillsets, and workforce costs across your entire organization.
- Bring agility to developing and pivoting workforce plans to meet changing business demands.
- Design forward-looking talent strategies that are aligned to your business goals and budget.
- Inform your talent acquisition and management teams with early insight into the timing and budget for roles and skills in demand.

Professional and Business Services Planning

Start your Connected Planning journey with Anaplan to drive better management decisions, collaborate with the entire business, and lead finance transformations aligning corporate objective with financial plans.



- Finance
- Sales
- HR/Workforce

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 2,400 of the world's best brands continually optimize their decision-making by planning with Anaplan.

To learn more, visit www.anaplan.com

