Publicly held and rapidly growing Software-as-a-Service (SaaS) leader in team collaboration and workforce management supporting over 100,000 customers globally.

$5.5B Software Company

Anaplan for Finance
Anaplan for Sales Planning

Business Challenge

- **Scalable Planning & Reporting** – Thriving organization had outgrown the capabilities of prior planning systems (Planful) and needed a tool with the flexibility to model future organizational changes

- **Business Vertical Alignment** – Difficulty in keeping sales planning aligned with the financial forecast due to difficulty in connecting various software platforms

- **Managing Sensitive Data** – Time-consuming manual security measures taken to secure data in legacy spreadsheets

- **Version Fidelity** – Managing quotas and capacity models across stakeholders in google sheets which led to version confusion

Solutions

- **Revamped Reporting** – Creation of Financial Statement forecasting including ability to plan by region in local currency and convert to USD for aggregate reporting; ability to forecast out P&L, Balance Sheet and Cash Flow

- **Software Integration** – Consolidated automation of integrated software across Workday, SFDC, among others

- **End User Guardrails** – Utilized end user roles (selective access) to manage employee access to sensitive data

- **Versioning** - Utilized Anaplan native functionality to allow for "what-if" and various other planning versions for finance and sales verticals

Impact

- **Long-Range Planning** – Able to rely on consistent methodologies in order to confidently plan on a long-term basis

- **Streamlined Reporting Capabilities** – Connected, integrated, and automated processes produce consistent, accurate reports for various business departments

- **Improved Workforce Planning** – Strategic workforce planning to model headcount planning at higher level to model changes to Headcount Plan

- **Flexible Sales Planning** - Ability to adjust quotas, sales organization, and sufficient staffing to meet increasing demand

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