

Leading organization that designs technology platforms designed to create daily habits and sustainable behavior change to empower people to lead happier and healthier lives. Their health and wellbeing platform, benefits navigation, care management and coaching programs impact over 100 million people across 190 countries.

Business Challenge

- **Disconnected Forecasting & Reporting** - Prior legacy processes utilized spreadsheets from several platforms causing risk and delays in forecasting and reporting capabilities
- **Inefficient Vendor Planning** - Methodology for vendor planning did not provide adequate detail for value-add analysis
- **Global Intricacies** - Company identified a need for process standardization across entities, including tracking and hedging foreign exchange rates

Solutions

- **Time-Sensitive Outputs** - Management-view financial statements and dashboards allow for annual budgeting with monthly re-forecasts and weekly enterprise performance
- **Sales Detail** - Creation of standardized planning dimensions for lists and hierarchies including time, versions, accounts, projects, department, cost center and vendor allow for in-depth detail
- **Dynamic Versioning** - Financial forecasting processes allow for “What-If,” as well as other planning versions for budgeting and analysis

Impact

- **Process Efficiencies** - New vendor level planning allowed for an efficient, accurate output saving time for value-added analysis and planning
- **Source of Truth** - Strategic ERP and HR data sources merged into Anaplan for one standardized source of truth for business verticals to ingest
- **Currency Conversions** - Models built out with ability to plan in local currencies with translation to USD as needed

Leading Global Health & Wellness Digital Platform Provider

Anaplan for Finance -
FP&A Forecasting and
Vendor Planning