

Peloton's Anaplan for Insurance FP&A Application Suite

Utilizing our experience helping P&C carriers, Peloton Consulting Group has an Insurance-specific solution to jumpstart your Anaplan journey. Our pre-built model contains logic for the P&L, including Premium, Loss, Commissions, and Premium Tax. The model is flexible and integrates with other Peloton pre-built models for General Expense, CapEx, and Workforce planning needs. Our off-the-shelf logic can be implemented as-is or adapted to meet your specific needs.

Value to Client

- Reduce cost associated with custom developing insurance-specific logic
- Faster requirements definition facilitated by consultants versed in the insurance industry
- Option to rapidly adopt system as-built, connect sources, and start planning

Key Functionality

- Multi-channel, multi-state, multi-product dimensionality for Written, Earned, and Losses
- Commissions & Premium Taxes for calculations
- Assumed & Ceded Reinsurance by Treaty
- Financial Reporting & Dashboards
- Adapt or customize logic to meet specific needs

How We Do It

Our team of experts will conduct a gap-fit to our pre-built logic to identify areas where the system needs tailoring to meet your specific needs. We'll connect source systems to Anaplan for Financial & Operational actuals and/or other key inputs from Distribution/Product/ Underwriting. We'll share our expertise by providing user trainers for you and your teams. Then we'll begin logic testing, integrated testing, and finally the go-live.

Key Benefits

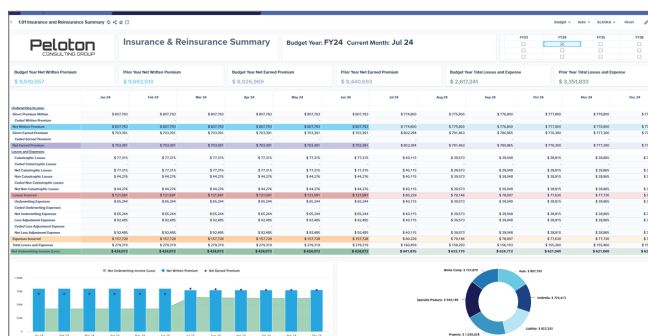
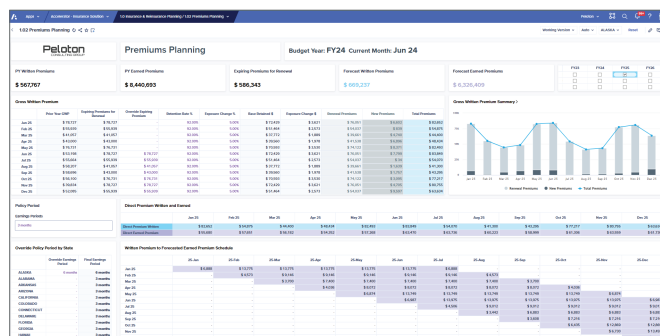
- **Rapid Implementation:** 10-15 weeks
- **Ready-to-Implement Logic:** Best-in-class, driver-based planning
- **New Business:** Quote-to-Bind Ratio
- **Renewal Business:** Monthly Retention
- **Premium:** AWP, Rate & Leakage Buildup
- **Pre-built Earnings Patterns:** Flexible for multiple policy terms
- **Losses:** Target Loss Ratio & Seasonality
- **Out-of-the-Box Reporting:** 20+ Pre-built Reports & Data Forms
- **Embedded Error Handling:** 5+ Pre-configured data maintenance & exception pages
- **Other:** Volume-Driven Commissions & Premium Taxes

Other Peloton Insurance Solutions in Anaplan

- Expense Allocations
- Strategic Workforce Planning
- Investment Performance & Compliance, Reinsurance
- Enterprise Project Planning
- Incentive Compensation

Why Do We Like Anaplan for Insurance?

- **Real-time data modeling:** The ability to model out changes in assumptions, such as rates, retention, price elasticity and see an immediate impact on how those changes will impact written & earned.
- **Flexibility:** Key assumptions for insurance are often defined at varying grains of detail. Anaplan's data model allows for this to occur naturally. For example, countrywide retention or auto policy counts across multiple coverages. Anaplan technology allows data to be planned "naturally" and use technology to apply.
- **Logic Transparency:** With Anaplan, end users can easily "investigate" the underlying calculation methodology/logic associated with the data. Calculation logic is "one click away." Whether the user is new to the system or just needs a refresher, the logic is not buried away in a difficult to understand language.
- **Underlying Technology:** Anaplan calculation language mimics a format and syntax that most finance users are accustomed to – Excel. This allows new team members to ramp up quickly when tasked with understanding and/or adapting logic to match revised thinking around planning methodologies.



About Peloton Consulting Group

Peloton Consulting Group has the vision and connected global capabilities to help organizations envision, implement, and realize the benefits of digital transformation. Our team has the best practices, knowledge, industry expertise, and know-how. We make digital transformation a reality by leveraging Enterprise Performance Management (EPM), Enterprise Resource Planning (ERP), Supply Chain Management (SCM), Human Capital Management (HCM), Customer Experience (CX), Analytics, and Data Management for the cloud. Through connected capabilities, we bring people, processes, and technology together. We help organizations go further, faster. That is the Peloton way!