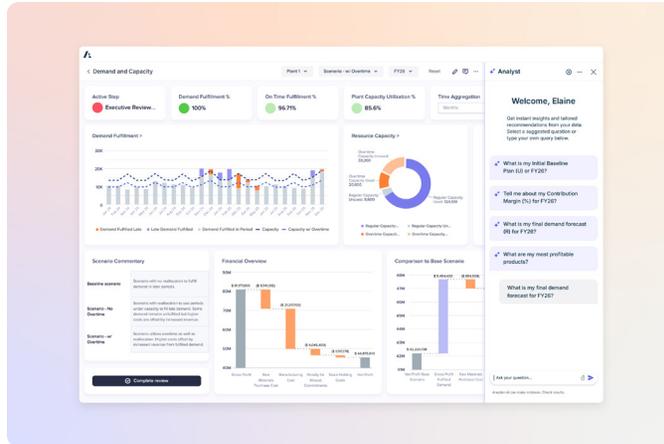# Anaplan Custom Analyst

Get secure, trusted insights from your custom Anaplan models — simply by asking

Custom planning models contain critical data based on unique business scenarios — but the insights within these models are often not easily accessible to the business decision makers who need them most. Teams may not know which dashboards, reports, or UX pages are relevant, and often need help creating new reports, charts, and visualizations. As a result, timely insights take too long, slowing critical decisions.

There's a smarter, faster way to plan

Anaplan Custom Analyst is a conversational AI agent that lets business users ask natural-language questions and get trusted, governed insights grounded in their specific planning logic and organizational context. Built, configured, and governed through Anaplan Agent Studio, it inherits Anaplan's existing security, roles, and permissions — ensuring model-grounded, permission-aware access embedded directly in the platform.

Teams across the enterprise can take advantage of Custom Analyst:

Finance
Ask natural-language questions of custom finance planning scenarios to retrieve immediate insights, rankings, and trends from approved models.

Sales
Enable sales planning stakeholders to query custom sales performance and planning scenarios with immediate, data-backed insights.

Supply chain
Self-serve insights from custom supply and operational planning models via conversational Q&A, charts, and summaries.
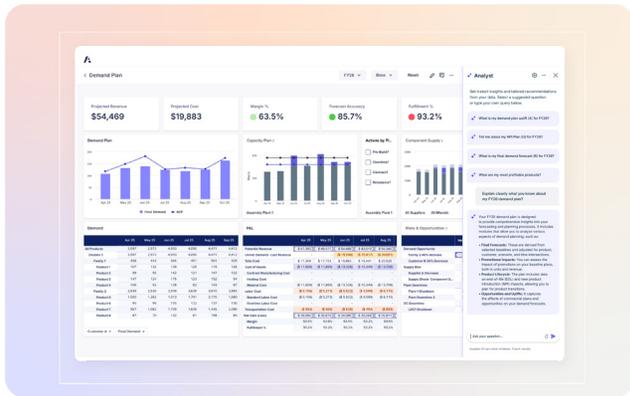
Workforce
Enable workforce planning teams to ask "what" questions and retrieve descriptive insights from custom workforce planning scenarios.

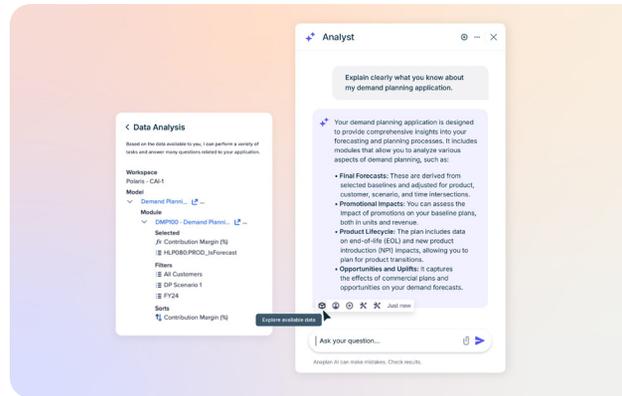### Executives / Business leaders
Get fast answers grounded in custom planning models, with data lineage for trust in operational and executive decisions.
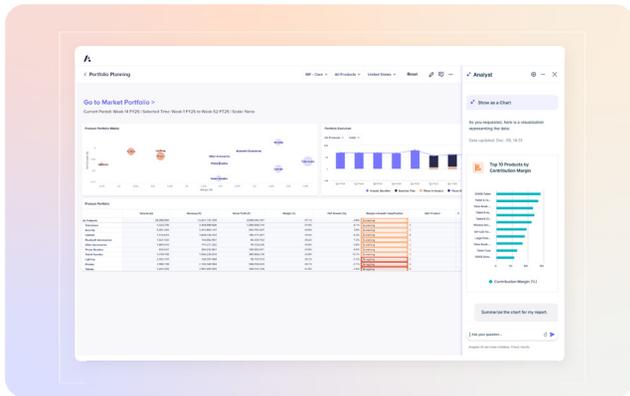
Any business planning need
Extend conversational access to insights across bespoke processes or industry-specific planning scenarios and get answers grounded in your organization's planning logic and data.
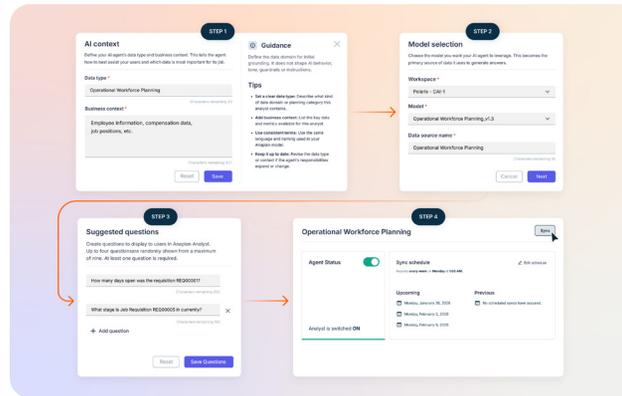
Access decision-ready insights from custom planning models easily:
Ask questions and get answers directly from your custom Anaplan planning models to move from question to action faster.

Trust and validate model-grounded insights before decisions:
Validate every insight with responses grounded in planning models and business logic, with built-in data lineage to see where results came from.

Self-serve insights across complex custom planning scenarios:
Built for business users, explore bespoke planning scenarios using conversational AI — with suggested visualizations (for rank or time-series queries) and summaries to support reporting.

Build, test, and enable Custom Analyst with confidence: Use Agent Studio to define model/data scope (down to modules and line items), test and refine answers, and deploy safely.

Deliver consistent, permission-aware insights at scale: Ensure every user receives answers grounded in the same approved models and business logic, while automatically respecting existing Anaplan access controls.

Key Features

1   **Conversational Q&A for custom models**

- Ask questions in plain English and receive answers for single values, time trends, and rankings.
- Designed for descriptive "what" questions about your planning data (for example, "What are my actuals vs. plan by region this quarter?").

2   **On-demand visualizations**

- Provides bar and line chart suggestions for supported ranking and time-based questions, which users can generate via the visualization suggestions button.
- Produces visual outputs directly from conversational queries.

3   **Data lineage & traceability ("receipt")**

- Answers include data lineage to the source model, module, and line items.
- Helps users verify and trust insights for decision-making.

4   **Follow-up questions (in-thread context)**

- Maintains context within a single conversation for a more natural dialogue.
- Enables iterative exploration without repeating the full question each time.

5   **Links to relevant UX pages / dashboards**

- Provides access to relevant UX pages and dashboards, allowing users to select where to continue their analysis.

6   **Workflow task creation from insights**

- Create Anaplan Workflow tasks directly from the conversation to act on insights immediately.
- Assign owners and due dates to drive follow-through.

7   **Lifecycle management in Agent Studio**

- Centralized experience to configure, test, and deploy Custom Analyst agents.
- Enables consistent rollout and ongoing management.

8   **Polaris Live Query vs. Classic scheduled sync**

- Supports custom-built models on Polaris and Classic calculation engines.
- Polaris can use Live Query Mode; Classic relies on scheduled data syncs (answers are as current as the last sync).

Four easy steps to set up Custom Analyst with Agent Studio

Custom Analyst is enabled using Agent Studio, giving administrators a controlled, governed way to configure and roll out conversational AI access to approved custom planning models.

Getting started is straightforward. In four steps, your Anaplan AI administrator can configure, test, and deploy a Custom Analyst using Agent Studio. After rollout, business users can ask questions and receive model-grounded insights within the Anaplan experience — while ongoing feedback and iteration help continuously refine and expand the Custom Analyst over time.

STEP 1

Define the Custom Analyst configuration

- Create the Custom Analyst, give it a name and business description, and link it to specific custom Anaplan models.
- Start with a clear business use case and a focused initial scope.

STEP 2

Curate approved model data

- Select the specific modules and line items the Custom Analyst can query.
- Provide business-friendly semantic descriptions so it understands your terminology, planning structure, and business logic.
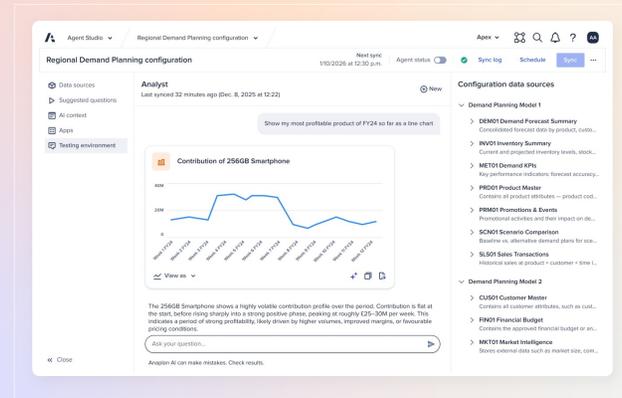
STEP 3

Define the experience, then review, sync, and test

- Add guided starter questions that showcase key use cases and help users unlock insights faster.
- Sync and test responses to validate accuracy and behavior before rollout.

STEP 4

Deploy for business users to ask, visualize, and act

- Make the Custom Analyst available within the Anaplan experience so that business users can ask questions in natural language, explore insights and charts, and take actions.
- Use data lineage to validate insights and create Anaplan Workflow tasks to take action.

Partner Quote on Anaplan Custom Analyst

" _____

Anaplan continues to demonstrate strong AI innovation with the introduction of Anaplan CoModeler, Anaplan Custom Analyst and Anaplan Agent Studio. From our delivery experience, these capabilities already provide a more practical and intuitive way for teams to build and interact with planning models, helping accelerate solution development and shorten the path from insight to action. As Anaplan's strategic partner in EMEA, we are actively working with customers to deploy CoModeler, Custom Analyst and Agent Studio today, while partnering closely with Anaplan as the capabilities continue to evolve to support broader, enterprise-scale planning use cases

Chris Minett
Solution Consulting Director
Bedford Consulting

About Anaplan

Anaplan is a leading AI-driven 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 2,500 global brands plan with Anaplan.

To learn more, visit www.anaplan.com

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