Narrative financial reporting

Tell the story behind your numbers with confidence and speed

Anaplan

Frustrated by slow, outdated narrative financial reporting? Periodic, reoccurring multi-author reports all share the same pain – multiple tools, disconnected data, and too much time spent on low-value work like data collection and validation.

Creating narrative reports – whether they're annual reports, earnings reports, investor presentations, board packs, management reports - shouldn't require chasing numbers or scrambling to reconcile last-minute changes. There's a better way to create and deliver trusted reports.

The strategic advantage

Modernize your narrative reporting with Anaplan. Eliminate the risk of errors, risks, and inefficiencies, from annual reports to filings. Connect data across your business and dynamically link it to text, charts, and visuals in Word, Excel and PowerPoint so your reports are always accurate and up to date. Enable real-time collaboration, ensure audit readiness, and empower your teams to confidently tell the story behind the numbers.

- **Create accurate, audit-ready reports in a fraction of the time.** Automatically pull real-time data using a single interface – no exports, no stale numbers, or last-minute surprises.

- **Bring your numbers to life.** Combine charts, KPIs, and narrative in one collaborative platform. Link data directly to narrative to enhance stakeholder understanding and fuel more strategic decision-making.

- **Boost collaboration.** Allow multiple contributors to work on the same document concurrently across teams, functions, and regions. Co-author and approve reports collaboratively to streamline workflows and increase alignment.

- **Ensure regulatory compliance and transparency.** Confidently meet evolving regulatory standards (e.g., SEC, ESEF, etc.) with built-in audit trails and version control.

- **Finance-owned and easy to adopt.** Author in Microsoft Office for instant adoption, no training, scripting, or IT reliance. Deploy in weeks with built-in connectors, calculations, and inversed design report creation.

> "We were considering a solution that would have cost a significant amount and taken months to implement. Between its out-of-the-box functionality, Office integration, and how our finance team can manage the entire reporting process, we quickly realized how much more we'd benefit from the Anaplan Disclosure Management application."
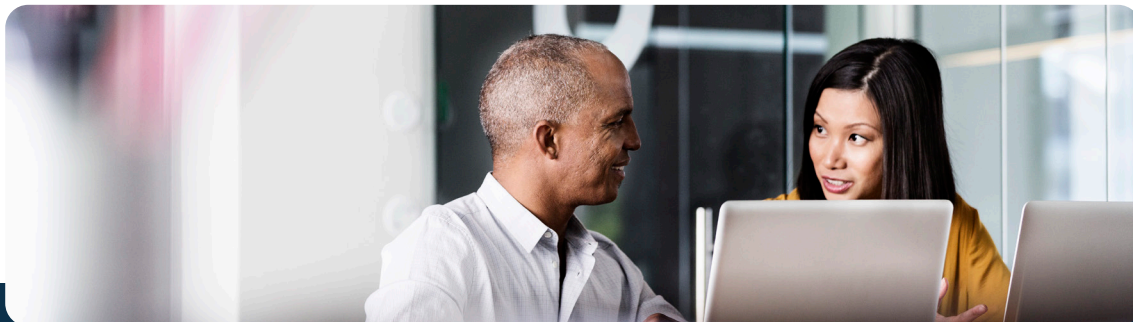>
> **CFO**
> Crypto products and services provider

Capabilities

- Create financial documents – including annual reports, earnings reports, investor presentations, board packs, management reports, and more – using a familiar Office experience

- Integrate data from multiple sources – ERP, finance and operational systems, and more – into the same document to eliminate manual uploads and stale data

- Perform automated, un-attended synchronization of documents with data coming from external sources so your narratives, tables, and charts always reflect live data

- Automate workflow and notifications from creation to approval and distribution to streamline reporting

- Manage and compare multiple versions of the same document to easily track changes

- Enable dynamic text, data, and table updates and roll-forward and push-down functionality to eliminate copy-paste errors

- Check data consistency across different documents and different paragraphs and sections within the same document to spot inconsistencies early

- Bundle multiple documents into a single report book and securely distribute them to specific audiences

- Manage user permission, audit trails, and version control to ensure secure collaboration and transparency

Features

- **True out-of-the box calculations, logic, and rules that go beyond templates and starter kits** to handle the complexity of your reporting process.

- **Built-in dashboards, reporting, and analytics** with data visualization providing a comprehensive view on financial position.

- **Collaborative and agile consolidation and reporting** across the enterprise. Workflow and prebuilt task types make it easy to automate everything from data loads to Teams notifications.

- Best-in-class **security and compliance** with role-based access control, user management, and SSO support with SAML 2.0 compliance, and data encryption.

- A **highly extensible ecosystem** — collect and analyze data in a single location using APIs, ETL connectors, and built-in integrations with other solutions.

To learn more, please visit:
anaplan.com/solutions/disclosure-management

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 2,500 of the world's best brands continually optimize their decision-making by planning with Anaplan.

To learn more, visit www.anaplan.com

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