Planning and budgeting for public sector

Anaplan

Government financial managers are expected to deliver better operating performance under increasingly tighter budgets and growing complexity. Standalone spreadsheets and complex systems only add to the pain. You need structure, speed, consistency, collaboration, and accuracy in your financial planning process. With Anaplan's Planning and Budgeting for Public Sector, you can create and connect user–friendly plans and formulas with financial and operational drivers—at scale and across your entire organization.

Create connected plans fast. Get your planning and budgeting basics done quicker, more accurately, and with less effort across plans, budgets, forecasts, and reports—all in one connected system. Anaplan links financial and operational plans together for seamless big-picture financial planning and analysis across your organization.

Model any scenario, dimension and time. Easily build and compare scenarios that represent your organization—aggressive, conservative, "what-if," and more. Create unlimited dimension hierarchies and lists, modeling changes with drag-and-drop—no coding or batch wait time required. Plan by any time bucket—week, month, and year.

Flexible driver-based plans and forecasts. Plan and forecast with financial and operational drivers that matter. Design models to include nuances of services and service levels offered and stress test your ability to deliver. Build plans on which you can collaborate and answer complicated questions in real time, so you can take immediate action for point-of-impact results.

Summary of capabilities

- Strategic planning
- Capital expenditure planning
- Budget formulation and execution
- Performance-informed budgeting
- Salaries and benefits projections
- Cost accounting/activity-based costing
- Financial consolidations
- Budget book preparation via MS Office

Key benefits

- Reduce cycle time and effort of planning, budgeting, and forecasting

- Take control and own the process, eliminating dependence on spreadsheets and IT

- Drive collaborative "big picture" with connected plans across Finance, Sales, Operations, and HR

- Increase accuracy and target achievement with driver-based models, real-time calculations, and automatic rollup across plans and reports

- Increase plan precision with broad collaboration and point-of-impact (program delivery) participation

- Seamlessly align strategic plan, corporate plan budget and forecast, top-down and bottom-up

- Jumpstart time to implement through pre- built configurable apps for planning, budgeting, forecasting, consolidation, and reporting

Key features

Budget formulation and execution

- Enterprise cloud planning for strategic plans, budget justifications, and annual budgets

- Driver- and assumption-based plans for consistent alignment organization-wide

- Integrated budget forecasting, including salary and benefit projections, project tracking, and identification of unfunded needs

- Role-based, secure access for relevant budget entry, accountability, and auditing

- Budget by any time bucket—month, quarter, year

- Allocation shortcuts (historical, seasonal, 4-4-5) for fast, accurate plan calculation and update

Top-down and bottom-up

- Dynamically cascade strategic plan by key outcomes, programs, and required budget resources

- Formulate budgets bottom-up or based on incremental initiatives while informing your budget with performance information

Versions and scenarios

- Multiple versions for comparison, with centralized control for consistent versioning agency-wide

- Unlimited scenarios for proactive comparative insight and better choices

Flexible, user-owned business rules

- Simple, real-language formula creation—no coding

- Drag and drop for different hierarchy rollups, add new initiatives, change chart of accounts, update business rules—with no dependence or burden on IT

Budget modeling, analysis, and "what-if"

- Easily create complex models and "what-if" scenarios on-the-fly that answer ad-hoc questions: e.g., if your budget is cut by 3% what will be the impact on program results?

- See the impact on programs and results within an agency or across multiple programs department-wide.

Fee-setting and revenue planning and forecasting

- Plan fee generation for any agency and connect all other revenue-generation areas to create more accurate financial plans and forecasts

- Flexibly support changing fee reimbursement standards and simulations (to stress your forecast)

- Stress test your fee collection forecast based on services demand and projected economic indicators

Personnel planning

- Plan for headcount at group, role, or individual level to drive the details important to your organization

- Split, transfer, and adjust headcount across hierarchies (org units, regions, programs, projects)

- Automate key calculations, benefits, and salaries for fast, accurate, consistent projections and execution

Capital planning

- See real-time impact of capital plans across budget formulation and execution cycles

- Plan by different depreciation methods

Support alternate budget methodologies —zero-based budgets

- Adopt zero-based budgeting in all or parts of your organization

Reporting and dashboards

- Complete financial status report integrating spend and forecasts against plan across all budget versions

- Pivot reports by any dimension (time, geography, programs) for custom, no code, views on-the-fly

- Create visual dashboards for relevant, at-a-glance understanding—maps, charts, waterfall, alerts, etc.

Built-in financial consolidation

- Make consolidation part of broader planning process

- See how consolidation results will change in lockstep with scenario planning

- Model "what will be reported" to legislators and regulators and adjust before final decisions

Data integration to other systems

- Connect with other systems using Anaplan Connect, APIs, MuleSoft, Boomi, SnapLogic, or Informatica
- Fast and easy import/export via spreadsheets

MS Office integration

- Microsoft Office add-ins for seamless planning, document publishing, and reporting in Excel® and PowerPoint®
- Enter budget offline via Excel add-in, accurately and automatically pushing back into Anaplan in one click

Audit trail

- Track and review history—versions, scenarios, activity

The Anaplan platform offers

- **"What if" scenario and multi-dimensional modeling**, powered by our patented Hyperblock® calculation engine, producing ultra-fast calculations at unprecedented scale so you can anticipate market changes.
- Built-in dashboards, reporting, and analytics with data visualization providing **a single source of truth** on business performance.
- Collaborative and agile planning across Sales, Finance, Supply Chain, HR, Marketing, and other business units.
- Best-in-class **security and compliance** with role-based access control, user management, 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.

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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