Financial planning and consolidation: Purpose-built. Connected. Uncompromised.

Drive financial performance excellence with purpose-built applications delivered via seamless UX/UI for a unified user experience

Anaplan

When it comes to financial planning and consolidation, a one-size-fits-all platform might seem convenient — and was historically the only option — but it comes at a cost. Solutions built on a singular platform force tradeoffs, sacrificing either the agility and flexibility needed for dynamic planning or the rigor and control required for accurate consolidation.

There's a better way to plan, record, and report

At Anaplan, we understand planning and consolidation are fundamentally different processes that require a degree of autonomy to ensure effectiveness. That's why we've created built-for-purpose applications for financial planning, consolidation, and reporting delivered through a seamless, unified user experience.

Our embedded purpose-built services with AI at the core and common data model give finance teams the best of both worlds — agility and greater dimensionality in planning, paired with control and auditability in consolidation. The result is a resilient, high-performing, future-ready finance organization equipped to thrive in a constantly evolving business environment.

Key benefits

- **Streamline data workflows with enterprise-ready,** native data integration, transformation, and management using Anaplan Data Orchestrator (ADO) to enable end-to-end financial management.

- **Model your planning at any level.** Our unlimited dimensionality gives you the flexibility to plan across any business driver or time period, unlike rigid accounting-based solutions that limit dimension count.

- **No-code rule configuration.** Business users can create and manage rules through UX pick lists in just a few clicks, no scripting or VB.NET formulas required.

- **Finance-owned, reduce IT overhead.** Our applications are cloud-native and delivered through the browser for optimal user experience. No desktop installs, plugs-ins, or ongoing IT support for updates and maintenance.

- **Accelerate time to value.** Get best practices, calculations, and templates out-of-the-box for planning, consolidation, and reporting that are configurable to your business needs and can quickly scale to support growth.

- **Turn insights into action with AI.** Use explainable AI-driven finance applications to analyze data faster, build trust in results, and connect insights into every decision.

2,500+ companies choose Anaplan

ABInBev

Bayer

Coca-Cola

DAIKIN

Deloitte.

JLR

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on

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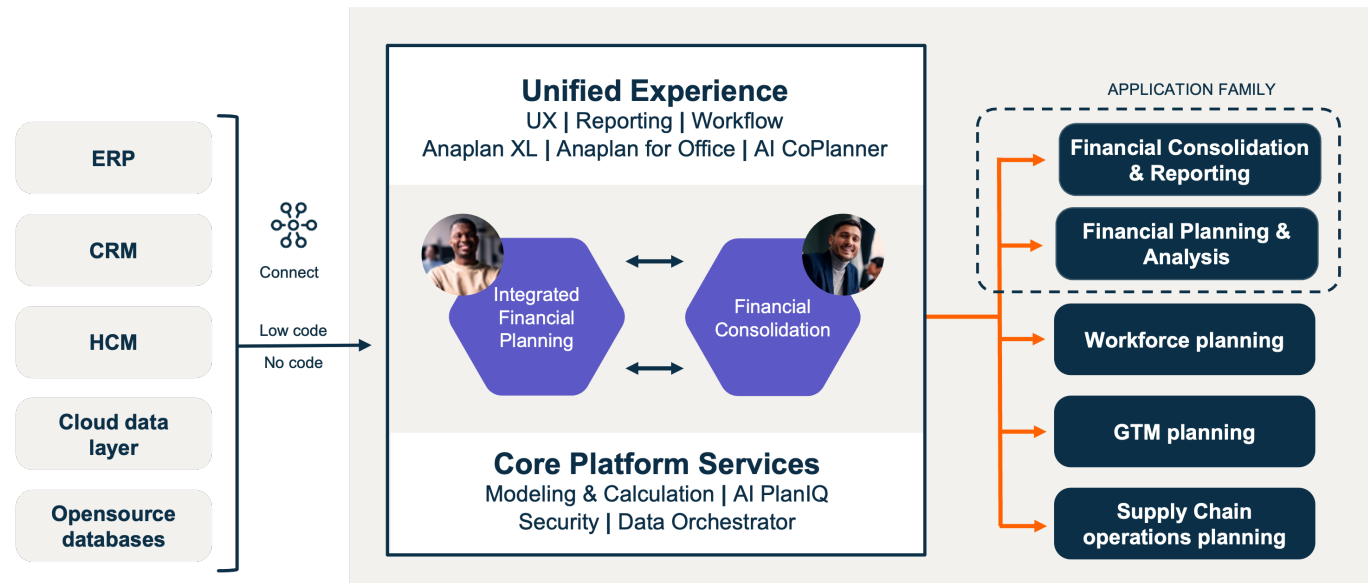
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Solution details

Purpose-built applications delivered via seamless UX/UI for a unified user experience

Financial Consolidation

- Eliminate manual, error-prone work and increase automation and accuracy across the consolidation and reporting process
- Business-owned to support statutory and management consolidation with precision and control
- Fully supports multi-jurisdictional statutory consolidations
- Ensure compliance and accuracy with audit-ready controls, time-based ownership, comprehensive eliminations, and fully tracked data movements throughout every consolidation step

Integrated Financial Planning

- Model quickly with simple configuration and unlimited scalability and flexibility
- Unlock greater insights with real-time reporting, analytics, and visualization across multiple versions and dynamic scenarios
- Adapt on the fly with a platform built for scale. Flexible to shifting priorities, any timelines, and complex data structures
- Leverage our Anaplan Finance Analyst — your always-on AI agent for smarter planning — to drive decision-making and financial health monitoring

ERP

CRM

HCM

Cloud data layer

Opensource databases

Connect

Low code

No code

Unified Experience
UX | Reporting | Workflow
Anaplan XL | Anaplan for Office | AI CoPlanner

Integrated Financial Planning

Financial Consolidation

Core Platform Services
Modeling & Calculation | AI PlanIQ
Security | Data Orchestrator

APPLICATION FAMILY

Financial Consolidation & Reporting

Financial Planning & Analysis

Workforce planning

GTM planning

Supply Chain operations planning

Some information in this document may have product roadmap that is intended to outline our general product direction and is provided for informational purposes only.

Solution details

Embedded common data model and purpose-built services

Financial Consolidation

- Connect with ERPs, general ledgers, and financial and operational systems across subsidiaries and regions, regardless of chart of account or fiscal years, mapping them to your corporate standard

- Ensure data conformity and accuracy with in-system data mappings and ingestion definitions for complete and accurate data loads

- Data security configured by business administrators, at the most granular dimensional levels

- Automated roll-forward of data, eliminating manual, error-prone processes

- Full data calculation visibility showing beginning to closing values, highlighting every data change along the way

Integrated Financial Planning

- Leverage pre-built data pipelines for financial and headcount data to quickly integrate source systems

- Adopt out-of-box dimensionality and easily extend to support unique requirements for quick deployment

- Quick set up with configurator and implement best practice-based built-in FP&A processes, reducing implementation risk and speeding up user adoption

- Turn data into action with robust reporting and visualization designed for both finance and business users

- Access embedded generative AI, allowing conversational queries for real-time, deep insights and in-depth analysis of your financial data

The Anaplan platform offers

- **"What if" scenario and multidimensional modeling** powered by our purpose-built services, producing ultra-fast calculations at unprecedented scale.

- **True out-of-the box calculations, logic, and rules that do not require any customer coding or bespoke application scripting** to handle the complexity of your consolidation and reporting process.

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

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

- Best-in-class **security and compliance** with role-based application and data 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.

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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