

EBOOK

# The partnership between finance and HR to overcome the talent imbalance

Placing intelligent bets on the  
future of the organization.



**Anaplan**

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# Improving collaboration between finance and HR to drive more effective and profitable business outcomes

No business can achieve sustainable financial growth without the ability to attract, develop, and retain a high-quality workforce. Unfortunately, this is easier said than done. Skills gaps, talent shortages, rising workforce costs, and staff burnout leave many organizations dealing with project delays, budget over-runs, overworked teams, high turnover, and lost productivity.

In addressing these challenges, finance leaders are often left with more questions than answers:

- How can we maximize workforce returns and productivity while optimizing workforce costs?
- Have we included our talent needs, associated expenses, and potential risks when laying out our strategic targets and timelines?
- Is our human resource (HR) team an active contributor to our strategic planning?
- How can we better plan to address skills needs and shortages, including upskilling internal resources, outsourcing, hiring, and how can we close those gaps?
- Can we develop an organizational roadmap, laying out the options with full visibility into its financial impact

Layer in ongoing business model shifts and unpredictable market forces, and it becomes clear why finance and HR leaders need to rethink how they plan together.

These questions are foundational to an organization's ability to thrive and grow, and answering them requires deep collaboration across the organization, especially between finance, HR, and talent acquisition teams. HR has the practical expertise the finance organization needs to understand the full costs, benefits, and workforce configuration options available to the business, along with the savvy to help connect human performance with business performance and results.

It's time to strengthen the partnership between finance and HR, break out of siloed planning exercises, and elevate to a new level that helps the business thrive.





**HR is focused on building the right workforce through:**

- Talent Acquisition
- Onboarding
- Learning and development
- Creating connections and winning culture
- Performance and goals
- Compensation and total rewards
- Retention



**Finance is focused on delivery of:**

- Revenue growth
- Cost containment
- Margin improvement
- Risk mitigation
- Short- and long-term goals important to investors and owners
- Identifying opportunities for profitable growth
- Optimizing resources for efficiency

# Why aren't HR and finance on the same page?

For years, finance and HR have worked toward shared business goals — but often from siloed systems, disconnected data, and conflicting timelines. Why is communication and collaboration between HR and finance so challenging? Both functions work to support the organization's strategies and initiative, playing critical roles in its overall success. However, each has their own unique focus, success metrics, and processes.



While these two views are not directly at odds, the differing focus of each team can create divergent perspectives on hiring and retaining employees. Does HR have a line of sight into business strategies and initiative, financial growth objectives, and timing? Does finance understand the hiring and ramping timelines, expected attrition rates, changing compensation, and workforce expectations for full visibility into productivity expectations? Do both teams jointly assess financial implications and scenarios to drive transparency, collaboration, and accountability?

The answers to these questions are typically 'no', so both departments then operate separately. This disconnection widens as each team focuses on their independent goals.

Additional challenges stem from the inability to access information across the enterprise. Often, critical information

is siloed with individuals, teams and departments — typically in spreadsheets or disconnected planning software — which can lead to issues with visibility, data integrity, and flexibility. When spreadsheets are scattered everywhere and software doesn't allow seamless collaboration across functions and departments, information gets lost, and no one has a complete view — making it difficult for everyone to analyze the full picture effectively. Worse, when nobody shares information or knows how to access the data maintained by other teams, frustration and miscommunication are likely along with countless hours spent in creating reports and reconciling differences. More importantly, if each department maintains its own information and conducts its own independent analysis of that information, decisions can be made without all necessary data or full visibility.



Finance and HR have traditionally not shared ownership of strategy. Historically, finance has relied on data feeds from HR but has not always been fully transparent about key targets — such as revenue growth or cost reduction — making it difficult for HR to align talent acquisition and development timelines accordingly. The disconnect is not just due to outdated processes, entrenched attitudes, or assumptions, but also stems from a lack of collaborative technology that enables finance, HR and talent acquisition to work in sync and maintain a shared understanding.

A modern connected workforce planning approach can transform interdepartmental collaboration and create well-informed decision-making tools and processes. One where finance, HR, and talent acquisition leaders collaborate on a shared plan, confidently scenario-model talent strategies, and make proactive, business-aligned decisions. This transformation can have significant and far-reaching impact on the hiring and retention efforts of HR and the budget management efforts of the finance team, and most importantly, on the future pace, adaptability, growth, and profitability or efficiency of the organization.

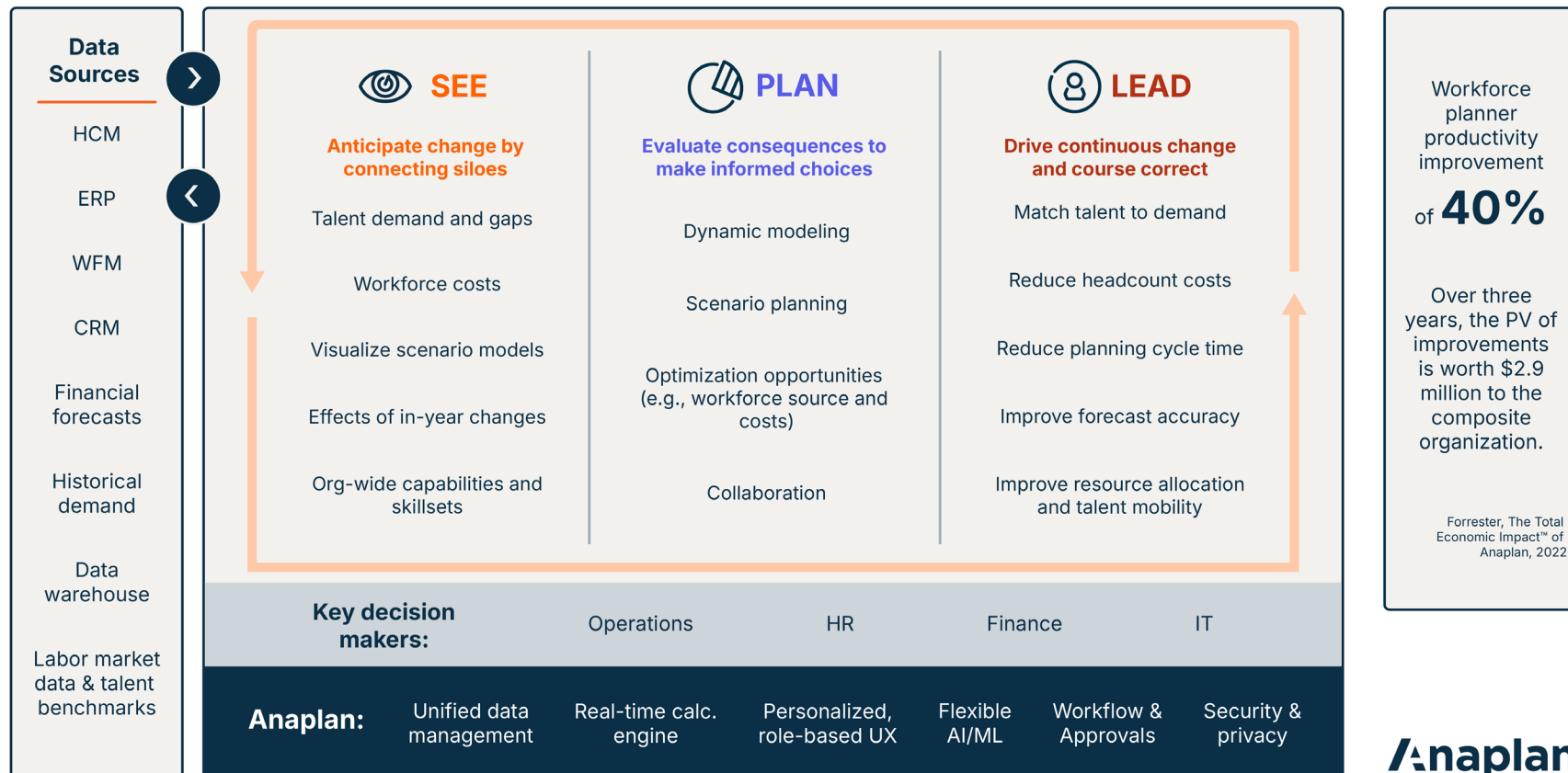
# How can finance and HR leaders help their teams improve collaboration?

Creating a mindset of shared ownership of the organization's ongoing operations aligned to strategy is foundational to developing effective cross-functional collaboration. To build this shared perspective, HR and finance teams need a single source of truth for critical information and real-time insights into the organization's current state, future goals, and gaps to address.

HR and finance teams also need to be able to conduct scenario planning and modeling based on these insights, analyzing the impact of timing, skills acquisition and development, employee investment, and more. This planning is impossible when organizations operate in silos. When you plan across the enterprise, such as research and development (R&D), sales, marketing, operations and supply chain, the outcome of one set becomes the input and driver to another, empowering HR to create the appropriate people plan.



# Agile, continuous decision-making with Anaplan for Workforce Planning Transformation



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# Turn your finance and HR alignment into a growth driver

Anaplan moves workforce planning beyond reactive hiring and annual budgets. It turns workforce strategy into a proactive, strategic advantage. With built-in AI, dynamic scenario modeling, and seamless integration to HCM, ERP, and talent systems, Anaplan helps HR and finance align every talent decision to financial targets and operational priorities.

These teams working in tandem gain visibility into costs and timing, helping them both balance, predict, and optimize the pace of hiring, turnover, and training to support profitable business growth.

When HR business partners and talent acquisition teams use Anaplan, finance has more opportunities to optimize costs, including:

- Training and upskilling instead of hiring from outside
- Making smarter decisions for potential staff optimization and reduction. For instance, keeping the talent that would be hard to hire back later
- Using location strategy to optimize cost and improve access to diverse talent pools
- Developing a more accurate cost analysis for attrition, retention, and succession, because the multiplier on talent loss is different for each tier of talent
- Enabling the agility to execute merger integrations, reductions in force, and other major workforce transformation initiatives

By bringing HR and finance teams together to work toward strategic objectives and operational targets, Anaplan can deliver significant value to your entire enterprise.



## Proactive response through agile and continuous workforce planning

As a business evolves, the workforce must evolve with it. Considering scenarios for the multitudes of potential disruptions and their impact on workforce and finances, then developing proactive responses can help maximize agility. Workforce modeling based on operational data combined with market and environment analysis can help predict and plan for change. Anaplan enables organizational agility and helps businesses grow and meet its objectives by helping to model any “what-if” scenario. This helps assess role and skills gaps, enabling comprehension of financial impacts stemming from a range of potential scenarios, including rapid growth, reductions-in-force, mergers and acquisitions, and restructuring. This cohesive modeling makes it possible for finance and HR to come together to develop plans to proactively address business evolution and potential risks, thereby increasing speed in responding to any eventuality.



## Flexible, comprehensive compensation planning

Compensation is not a one-size-fits-all scenario. Instead, compensation plans can be tailored and managed for specific employee populations. Understanding the impact various retention models and programs have on the bottom line can be difficult. Anaplan makes it easy to track and model all facets of your talent budget, including standard compensation, merit and bonus, and equity options. You can conduct extensive modeling to create the budget alignment needed for finance and HR to work together to attract and retain talent and adjust compensation equitably based on employee performance and market trends. This detailed view of the compensation budget also enables the finance team to generate more accurate cost analyses for attrition, retention, succession, and internal training.



## Driving decision excellence to inform business cases

Business cases for new programs or talent expenditures must clearly and accurately demonstrate the value of the investment. This partnership between finance and HR not only aligns human capital to growth targets, but data gathered by each team can be modeled to most effectively demonstrate business value. Anaplan helps your HR team use data for a true workforce planning transformation to build comprehensive and informed business cases for hiring investments, learning and development programs, and bonus programs to support mission-critical initiatives.



## Insightful measurement of performance

With Anaplan, your business can track, measure, and analyze the performance of individuals, teams, and programs with accurate, timely data. You'll be able to measure KPIs and quantify non-traditional ROI resulting from programs addressing diversity and inclusion, equity, culture, employee engagement and training, and social responsibility. Our Excel add-in, [Anaplan XL Reporting](#), and [Disclosure Management](#) application make it easy for both finance and HR to generate highly formatted, visually compelling reports that communicate key insights and are automatically distributed to executives and leadership, the board, and external stakeholders. Use the knowledge gained from these measurements to develop a clearer view of your organization's actual performance and health.



# Place intelligent bets on the future of your organization by connecting HR and finance

If your finance and HR teams struggle to stay aligned on workforce plans and priorities, you're not alone. Many organizations still rely on static spreadsheets, siloed data, and manual processes to keep headcount and hiring plans in check. This fragmented approach limits visibility, slows decision-making, and leaves business leaders reacting to problems instead of anticipating them.

A modern, connected planning approach breaks down these barriers. By integrating workforce, financial, and operations data into a single, dynamic view, leaders gain the transparency, speed, and foresight needed to manage constant change. Real-time insights into headcount, costs, capacity, and skills gaps help business, finance, and HR leaders stay ahead of risks and opportunities — and respond with confidence.

Creating this level of alignment isn't an overnight fix. It requires process optimization, technology modernization, and a shift toward collaborative, continuous planning. Start small, iterate quickly, and build trust through shared visibility and data-driven decisions in order to break through the barriers between teams. As your organization refines its workforce planning strategy, connecting finance and HR with a unified planning model will become a powerful lever for resilience, growth, and competitive advantage.

Most importantly, remember you do not have to tackle these issues alone. Anaplan and its partners are here to help you implement a real workforce planning transformation that's needed to ensure access to information, full transparency, and the scenario modeling and planning capabilities necessary to unlock the potential of your workforce and future-proof your organization

# Anaplan's connected HR and finance solution

Anaplan enables connected, continuous workforce planning with our [Operational Workforce Planning application](#) by ensuring that when changes happen in one part of the business, updates automatically ripple across every impacted plan and process. This gives finance, HR, talent acquisition, and business leaders early visibility into potential risks, opportunities, and decision points — so teams can act faster, stay aligned, and keep business priorities on track. How do we do this? Anaplan eliminates many of the roadblocks impeding cross-functional collaboration and communication through:

**Secure access to information:** Capturing and analyzing the required data to make informed planning decisions can be challenging. Anaplan enables the collection and analysis of your organization's data to securely give all teams the information needed to optimize decision-making.

**Connecting data and planning processes:** When departments maintain their own information sources, valuable cross-functional insights may be missed. Anaplan provides the ability to aggregate data from across systems into a single source of truth to enable all teams to work from the same data set with real-time updates when plans are modified, involving the right decision-makers across the organization.

**Delivering real-time, actionable insights:** Planning with stale data puts your workforce strategy at risk. Anaplan's platform continuously refreshes data, so finance and HR leaders can plan, model, and adjust in real time. That means faster reaction to changing market conditions, fewer surprises, and more informed choices that support long-term goals.

**Providing intelligent transparency:** Understanding what other teams are doing, planning, and thinking is critical to collaboration. Anaplan provides transparency into the key metrics needed to help connect the dots between teams. With Anaplan, your team can drill from high-level views into underlying position-level data — based on their role and access permissions — to explore the metrics driving the business. No more guessing about where the numbers came from or wasting time validating spreadsheets.

**Magnifying analyst impact:** Your finance and workforce analysts bring a wealth of knowledge about the business, data, and analytical methods — Anaplan gives them the tools to do even more. Anaplan provides a solid platform for them to benefit from data already cleaned and integrated so they can focus on new challenges, sharing their models and insights securely and easily with leaders and other teams. With built-in forecasting, machine learning, AI-infused insights, and integration with external data science tools, they can uncover the workforce strategies that will have the greatest impact.

By removing common obstacles to collaboration and decision-making, Anaplan provides HR, talent acquisition, and finance teams a shared foundation to effectively plan together within their own domains. This isn't just about better planning processes; it's about putting timely, trustworthy insights about your people, costs, and capacity in the hands of those who need them most. So your teams can plan smarter, adapt more quickly, move faster, and shape the future of your workforce with confidence.

To learn how Anaplan can help you place intelligent bets on the future of your workforce, [request a demo today](#).



## 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](http://www.anaplan.com)