

# Transforming enterprise planning for banking

Navigate market changes, reduce risk, and drive long-term success



## Reimagining planning for confident decision-making

In an era defined by relentless change, banks must rethink how they plan to stay ahead. Between unpredictable markets, new regulations, and heightened customer expectations, the challenges are nonstop.

Navigating this complexity requires rapid responsiveness and strategic foresight, capabilities that traditional planning tools simply can't deliver.

A disconnect between strategy and execution causes delays, ultimately leading to missed revenue

and lost opportunities. Every strategic shift — across finance, sales, HR, or distribution — demands a coordinated response, and siloed systems tend to slow momentum and undermine confidence.

To outpace change, banks need dynamic planning systems that connect teams, surface AI-driven insights, and fuel instant, informed decisions. With Anaplan, disruption becomes a catalyst for adaptability, resilience, and long-term success.



## Unlocking enterprise-wide agility and intelligence with Anaplan

Anaplan is the market-leading platform for scenario planning and analysis. We transform data into actionable insights for real-time, optimized decision-making, bringing agility across your enterprise. With Anaplan, you can:



**Activate your business** by seamlessly **integrating data and systems** to operate more efficiently.



**Accelerate planning and execution** with **Anaplan applications** to move faster and adapt to change.



**Connect teams** to **align planning processes** across the organization, eliminate silos, and improve coordination.



**Optimize decision-making** with **Anaplan Intelligence**, empowering teams with AI-driven insights.

Unlike traditional tools, Anaplan's centralized planning environment with dynamic scenario modeling provides a single source of truth, ensuring seamless collaboration and greater efficiency.

With Anaplan, you gain speed, adaptability, and precision, turning planning into a competitive advantage across every business function.



## FINANCE

### Gain transparency of operational drivers and financial health

FP&A teams need greater flexibility and foresight to navigate fluctuating interest rates and unpredictable economic conditions. Meanwhile, legacy tools and siloed data often delay time-sensitive decisions.

**Anaplan for Finance** provides a connected, AI-infused planning engine that links drivers and models to financial and operational plans, so companies can:

- Enhance transparency at the business line or product level to support real-time decision-making.
- Consolidate budgets and forecasts across business units, legal entities, and cost centers.
- Accelerate reporting with automated financial consolidation.
- Unlock value through intelligent balance sheet forecasting, leveraging data from finance, risk, ALM, and more.
- Predict and plan with confidence using embedded statistical and AI/ML-based forecasting.

## HR AND WORKFORCE

### Optimize talent, manage costs, and future-proof your workforce

Managing operating expenses with strategic workforce planning is essential, and shifts in demand, hybrid work models, and skills shortages make workforce planning increasingly complex.

**Anaplan for HR and Workforce** delivers real-time visibility into talent capacity, helping align workforce plans with business needs to control costs and pivot with confidence.

- Accurately model workforce needs by line of business to align headcount with operational goals.
- Improve forecast accuracy to reduce budget variance and optimize labor spend.
- Right-size contact center and branch staffing to boost SLAs, NPS, and customer satisfaction.
- Forecast talent demand across channels, including branch, digital, and third-party services.
- Run “what-if” scenarios to evaluate the impact of staffing changes, branch shifts, and evolving skill requirements.





## SALES AND MARKETING

### Deliver stronger results with strategic GTM planning

Evolving customer expectations across competitive retail, corporate, and commercial segments demand strategic responsiveness, but misaligned go-to-market (GTM) strategies and static plans often lead to missed opportunities.

**Anaplan for Sales and Marketing** provides greater visibility into the key commercial drivers of marketing ROI and sales performance across every segment, improving execution and accelerating growth.

- Gain visibility into markets, segments, accounts, and pipeline to improve forecasting and territory planning.
- Automate GTM planning and resource allocation to move from strategy to execution faster.
- Optimize sales capacity, territory design, and incentive programs to drive productivity and retain top talent.
- Track performance across regions, branches, and product lines to improve accountability and results.
- Use AI-driven insights to refine GTM strategies, maximize ROI, and align sales, marketing, and finance.

## From insight to impact: Modern planning that drives results

Leading banks trust Anaplan to plan and execute with greater speed, precision, and adaptability. By connecting strategy to execution across the enterprise, they stay ahead in a fast-changing market.

### SUCCESS STORY:

Mizuho Bank cut **budget prep time by 50%**, **shortened cycles by 25%**, and reduced its **expense ratio by 17%** while gaining clear visibility into cost drivers.



The traceability of data in Anaplan allows us to understand the driver-based cost allocation to a fine level of granularity."

Mayu Izumi, Vice President, Financial Control Team, Mizuho Bank



### SUCCESS STORY:

La Trobe Financial cut **reporting time by 98%**, **accelerated trade settlements by 50%**, and uses real-time alerts to proactively manage liquidity.



We can better see where we've come from and then where we're going. It means that we can run more efficiently."

Gary Bell, Chief Liquidity Officer, La Trobe Financial



Contact us today to explore how to transform your enterprise planning.

### 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)