

Streamline and optimize your financial consolidation and reporting



Executive summary

Do you struggle with slow, outdated financial consolidation and reporting processes? Legacy platforms lack the agility and scalability needed to keep pace with today's dynamic environment. Long, costly implementations, steep learning curves, and heavy IT dependencies drive up total cost of ownership – while complex customizations, inflexibility, and siloed data lead to delayed reporting, compliance risks, and inefficiencies.

What if your finance and accounting teams could move beyond these constraints?

Modernize your financial consolidation and reporting with Anaplan. Say goodbye to manual, time-consuming processes and easily integrate disparate data sources to create a comprehensive view of your financial position.

Read on to discover how you can use Anaplan to streamline and automate complex consolidation tasks and reporting to accelerate the close process, reduce risk, and free up your teams to focus on value-added analysis.



1. Improve and accelerate your month-end consolidation process

Traditional close and consolidation processes are no match for today's fast-paced, complex business environment. Consolidating financials across multiple entities, currencies, and reporting standards is time-consuming and error prone. Manual tasks like intercompany eliminations and currency translation add delays and risk, while complex ownership structures add yet another layer of complexity.

There's a better way. With the Anaplan Financial Consolidation application, you can centralize consolidation across entities and currencies to enhance the accuracy and auditability of your financial results. Built to scale with your business, this out-of-the-box solution is owned by finance and accounting — no IT required — and can be deployed in weeks, not months.

CUSTOMER CALLOUT

A fast-growing global chemical manufacturing company needed to integrate disparate ERP systems, ledgers, and processes. They wanted to spend less time closing their books while accurately reporting financial results. Their results:

- **Deployed in days versus months** needed for traditional software
- Improved closing and reporting to 2 days versus a month previously – **93% faster consolidation and reporting**
- **Successfully retooled operations and accounting process** to focus on fighting pandemic

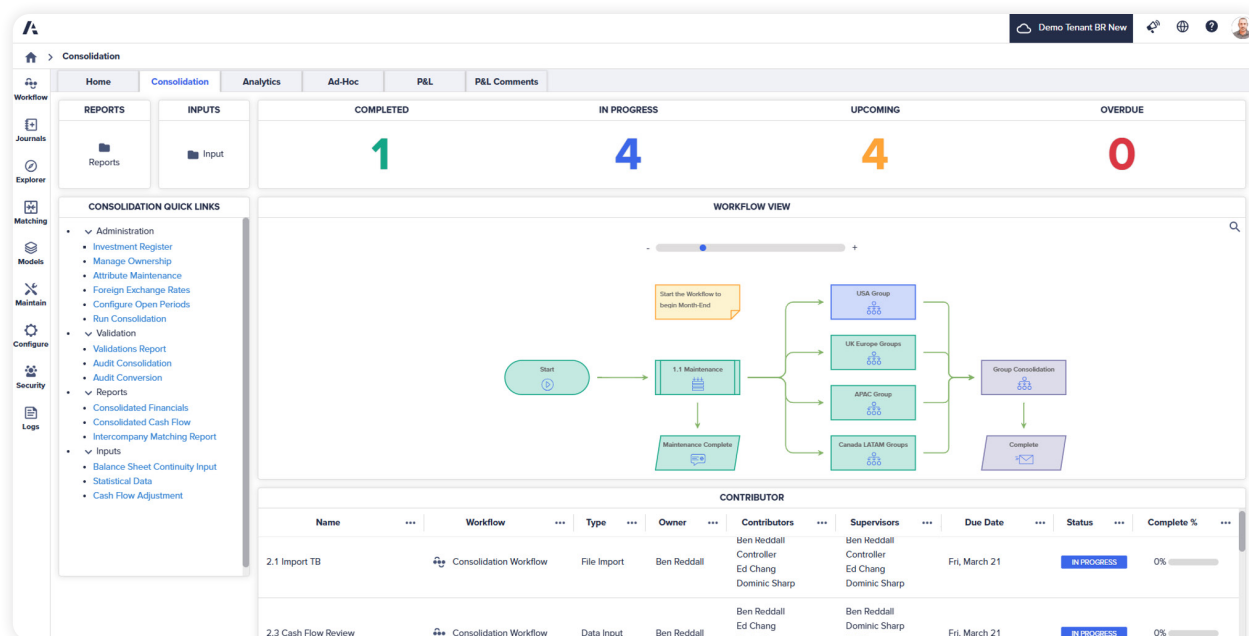


With most software we almost needed a PhD in coding. We needed something more intuitive and flexible. Something our accountants could own, not be held hostage by IT."

Controller, leading global chemical manufacturing company

Key benefits include:

- **Gain a unified view by connecting your ERPs, general ledgers, and operational systems** across various subsidiaries and geographic divisions, even with differing charts of accounts and fiscal years, mapping them to a corporate standard.
- **Convert financial results from multiple operating currencies** to your reporting currency and budgeted rates for comparative financial analysis.
- **Automatically remove intercompany transactions and balances** during the consolidation process to ensure accuracy.
- **Easily manage complex ownership arrangements**, including non-controlling interests, equity pickups, and minority interests to ensure compliance and control.
- **Meet global and local standards** by generating financial reports that are compliant with various accounting standards such as US GAAP, IFRS, and ASPE. Support both corporate and local tax and statutory requirements and global operations.
- **Produce and distribute timely and accurate financial and management reports** tailored to different stakeholders including management, regulatory bodies, and specific divisions or regions.
- **Close faster with a cloud-native application** designed for speed, agility, and transparency.





2. Enhance collaboration and compliance in your disclosure process

Traditional disclosure management processes are fragmented and manual, relying on disconnected spreadsheets and emails to compile financial narratives, regulatory filings, and board reports. This leads to version control issues, inefficiencies, and increased risk of error, while all teams operate under tight deadlines and evolving compliance requirements.

It's time to embrace a disclosure management and narrative reporting solution that eliminates the endless emails, proofreading, and competing versions.

The Anaplan Disclosure Management application not only meets required statutory reporting but also produces high-quality reports for all internal and external stakeholders. Create financial narrative statements and other documents that meet internal and external requirements such as board books, 10Ks, 10Qs, annual reports, and more.

The Anaplan Disclosure Management application is out-of-the-box, scales with your business, and is finance-owned with no IT required. Realize value faster, with the ability to go live in as little as two weeks.

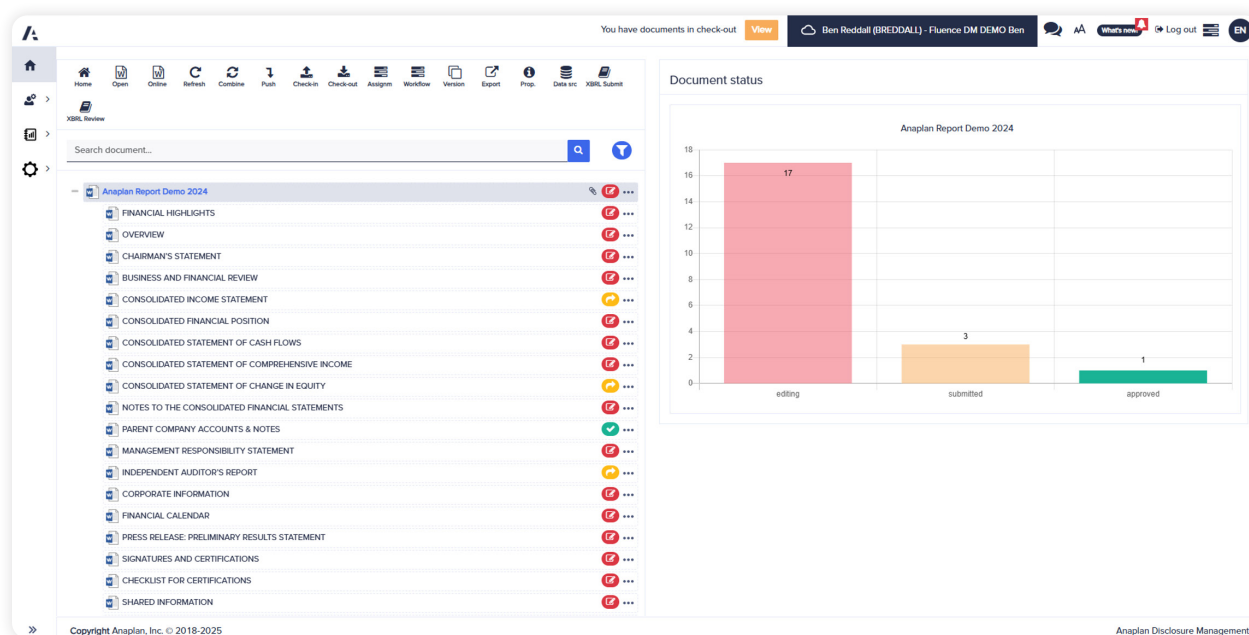


We were considering a solution that would have cost a significant amount and taken months to implement. Between its out-of-the-box functionality, Office integration, and how our finance team can manage the entire reporting process, we quickly realized how much more we'd benefit from Anaplan's Disclosure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

CFO, Crypto products and services provider

Key benefits include:

- **Faster, more accurate disclosures.** Automate the production and distribution of your statutory reports, board books, and regulatory filings to eliminate manual work, reduce errors, and speed up your reporting cycle.
- **Deliver trusted, consistent reporting** by connecting multiple financial, operational, and external data sources into a single integrated narrative.
- **Ensure compliance with existing and emerging regulations** of the SEC, ESEF, and other agencies while maintaining full transparency with built-in audit trails and version control. Address different entity or regional reporting requirements (e.g., GAAP, IFRS, country-specific compliance).
- **Manage disclosures without IT reliance.** Teams can create, update, and publish reports in a familiar Microsoft environment with full control over the process.
- **Increase collaboration** by allowing multiple contributors, including auditors and executives, to co-author, review, and approve disclosures in real time.
- **Ensure consistency across reports** with automated roll-forward functionality, push-down updates, real-time data syncing, and intelligent text updates that instantly adjust your report language.





3. Supercharge your reporting and ad hoc analysis

Today's finance teams are expected to operate with agility in a rapidly changing business environment. However, they are often challenged by complex business structures, outdated processes, and disparate datasets in fragmented systems that result in reporting misalignment and inaccuracies.

Unlike other tools, Anaplan XL Reporting gives your finance team full control of their reporting needs – going beyond dashboards to meet today's growing demands. It offers advanced formatting control and ad hoc capabilities by extending data-connected Excel, providing you with the flexibility and capabilities for insightful and interactive analysis, reports, and dashboards for any stakeholder at any time.

CUSTOMER CALLOUT

A leading media, services, and education company that operates in more than 50 countries — needed fast, flexible access to financial data, greater control over report design without relying on IT, and support for ad hoc reporting needs. Their results:

- **Eliminated risk** of data storage in Excel
- **Expanded usage beyond 30 initial users to 300+ across the business** for quality and consistent reports tailored for different audiences
- **Automated report distribution** using Excel, PDF, or PowerPoint files accessible on web and mobile devices
- Leveraged existing knowledge of Excel, **reducing the learning curve for a high adoption rate**

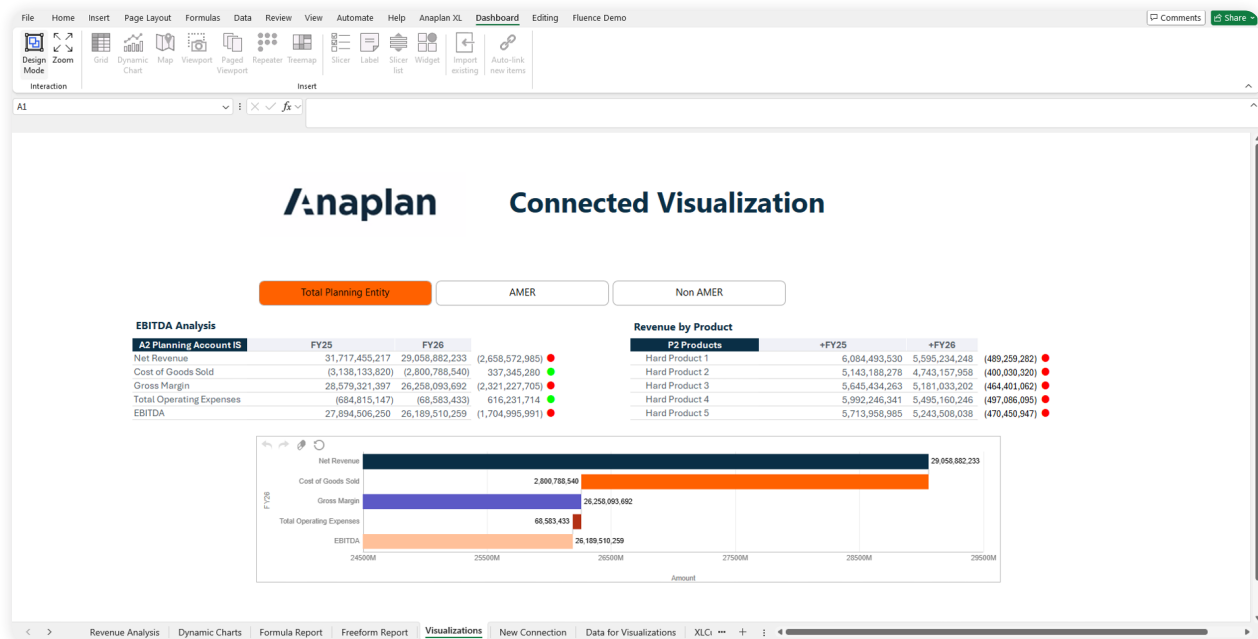


Anaplan XL Reporting gives us the flexibility that we need to efficiently implement the ever-evolving requirements of our financial reporting."

Senior Director, Business Intelligence at Bertelsmann

Key benefits include:

- **Accelerate reporting, no IT needed.** Empower finance teams with a finance-owned, no-code solution with self-serve capabilities for analysis, reporting, and dashboarding to meet challenging delivery timeframes.
- **Create a real-time, unified financial view.** Seamlessly connect multiple data sources and deliver real-time access to critical financial data. More than 30 built-in data connectors with bi-directional data flow to increase reporting accuracy and drive better analysis and decisions.
- **Increase control and governance.** Ensure governance required by IT while giving finance the flexibility to slice/dice and drill up/down into data with ease.
- **Clearer insights with less effort.** Use a library of interactive charts to elevate financial reporting and reduce maintenance with a finance-focused, intuitive visualizations connected to a multitude of data sources.
- **Seamless collaboration across devices.** Automate report distribution and share Excel-developed reports and dashboards easily with any stakeholder on web and mobile devices.
- **Improve time to value** with a low learning curve, fast user acceptance in a familiar Excel environment, and visualization that gives finance teams more time to focus on higher-value activities.



Modernize your financial consolidation and reporting today

Manual, spreadsheet-driven consolidation and reporting processes are no longer sustainable in today's fast-moving business environment. Accuracy, speed, and transparency are critical for quicker insights and reports demand by various stakeholders.

With Anaplan, your finance and accounting teams can accelerate close, simplify complex consolidation, and report with confidence. Modernize your consolidation and reporting processes with Anaplan to gain the speed, control and confidence your business needs to stay ahead.

Ready to elevate your financial consolidation and reporting? [Request a demo now.](#)



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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