

# Unlock the full potential of your bank with Connected Planning

## Face market complexities with confidence

As a banking leader, you're no stranger to today's challenges, including market volatility, fintech disruption, evolving regulations, and heightened customer expectations. These challenges place enormous pressure on your bank's financial performance, impacting your liquidity ratios, capital adequacy, ROTCE, and more. Staying ahead demands a smarter approach to your business planning.

Traditional planning with its time-consuming, manual processes and reliance on numerous spreadsheets can be detrimental in today's fast-paced banking environment. Always having to work with outdated, stale data further compounds the problem, leading to unreliable and error-prone planning.

The result: misalignment between strategy and execution, heightened risk, and missed revenue and growth opportunities.

Anaplan connects your data, people, and plans on a single platform, empowering you to make faster, more informed decisions. With Anaplan, you gain real-time data visibility, "what-if" scenario modeling, intelligent forecasts, and seamless collaboration across your bank. This means you can react quickly to market changes and minimize risks, ensuring your strategies align with execution.

Now is the time to modernize your bank's planning strategy. Many of your competitors are well underway — waiting is no longer an option.

### CUSTOMER STORY



With Anaplan, Mizuho Bank achieved:

- 50% less time to compile budget data.
- 25% faster budget cycle time overall, with no overtime.
- 17% reduction in expense ratio attributed in part to Anaplan use



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

**Mr. Mayu Izumi,**  
Vice President, Financial  
Control Team, Mizuho Bank

## FINANCE

### Maximize your balance between risk and return

From managing unpredictable economic conditions and interest rate fluctuations to geopolitical events, FP&A teams at banks are stretched thin. And through all this, you're expected to answer questions from leadership and shareholders faster than ever and with a higher degree of accuracy and precision.

**Anaplan for Finance** takes you beyond basic budgeting. Link advanced drivers and models to financial and operational plans across finance, sales/distribution, operations, HR, and individual LOBs. With Anaplan for Finance, you can:

- Improve planning at the line of business or product level (mortgages, credit cards, deposits, etc.).
- Consolidate budgets and forecasts from various business units, statutory or operational entities, and cost centers with ease.
- Quickly conduct scenario modeling and stress testing to determine the best path forward.
- Optimize opportunities with intelligent balance sheet forecasting, leveraging data from finance, risk management, asset and liability management, and more.
- Confidently predict and plan for today and the future with embedded statistical and AI/ML-based forecasting.

## SALES & MARKETING

### Lead your bank to stronger results

As customer expectations evolve across competitive retail, corporate, and commercial segments, you need to stay ahead to gain a competitive edge. To do this, you need greater visibility and agility to adjust your existing omnichannel go-to-market strategies, explore new business models, and focus on the right markets to achieve your evolving strategic goals.

**Anaplan for Sales and Marketing** provides you with greater visibility into the key drivers of marketing ROI and sales performance and the tools you need to develop a connected revenue strategy. Gain a comprehensive view of the commercial drivers in each segment, align your teams to improve customer loyalty, and improve your go-to-market execution to drive growth. With Anaplan, you can:

- Better understand your markets, segments, and accounts to more easily review account and geographical assignments and create optimal sales territories.
- Design incentive programs that attract, motivate, and retain top talent.
- Better plan your teams' goals and their distribution process across regions, branches, and product types.
- Track individual, team, and branch performance, and forecast accurate sales results at scale.
- Streamline marketing campaign planning, track results, spend, and your contribution to revenue.

## CUSTOMER STORY



### Major UK Retail Bank

With Anaplan, a major retail UK bank achieved:

- <5% deviation in overall forecast accuracy, down from over 12%
- 90% of intervals are forecast within target deviation of 5%
- Improved net promoter score (NPS)



Because Anaplan is helping us put resources in the right place at the right time to help our customers, our employees are now more engaged, as they can really see the value that they are adding."

Customer Experience Lead,  
Major Retail UK Bank

## Banking Planning

Optimize your bank's omnichannel strategy by connecting financial targets with sales incentive programs and demand plans to maximize talent retention and profitability and achieve your strategic goals.



- Finance
- Sales & Marketing
- HR/Workforce

## Optimize your workforce to drive sustainable growth

With over 50% of a typical bank's total operating expenses typically spent on headcount, managing your costs and creating a lean operating model is key to your success. Enter strategic workforce blueprinting—an elevated, connected approach to workforce planning that ensures alignment with your bank's objectives to drive growth and profitability.

**Anaplan's solution for strategic workforce blueprinting** enables you to understand exactly what talent levers to pull and how to optimize costs to deliver exceptional customer value. Drive growth with a centralized, accurate view of your headcount, costs, and capabilities. With strategic workforce blueprinting, you can:

- Gain the flexibility to model each line of business's unique headcount needs.
- Reduce budget variance through greater forecast accuracy.
- Improve contact center planning and increase SLA and NPS through right-sizing skills and capacity.
- Accurately forecast workforce demand and capacity across different channels, such as branch, online, mobile, third-party services, etc.
- Model detailed "what-if" scenarios to strike the right balance in addressing your short-term workforce needs and anticipating future talent and skills (e.g., AI, automation) requirements.
- Assess the impact of branch openings, closures, or repurposing of headcount, activity, costs, customer service, and profitability.



### 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 2,400 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)