

WHITE PAPER

The CIO/CFO partnership: Unlocking enterprise agility and value

A guide for CIOs to bridge the finance–technology divide and create a new leadership model.



/anaplan

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The **visibility gap** between CIOs and CFOs

The biggest barrier to digital transformation isn't technology — it's the visibility gap between IT and Finance.

As a CIO, you are under more pressure than ever to prove ROI on digital initiatives, embed AI responsibly, anticipate disruption, and safeguard trust — all while reducing costs. But even the best digital strategy will fail without first aligning IT with finance.

Too often, CIOs and CFOs make decisions from partial data. The CIO is focused on systems and infrastructure; the CFO is focused on margins and risk. But for both parties, poor line of sight across the business impedes growth. In reality, CIOs can't deliver transformation without financial alignment and CFOs can't deliver resilience without technology leadership.

The remedy is a centralized planning platform. With a single source of planning truth, you gain transparency, accountability, and the ability to link digital initiatives directly to financial outcomes. It also aggregates insights across teams and systems, giving you the full line-of-sight needed to make confident enterprise decisions.

Closing the finance–technology gap is not just a leadership priority — it is a necessity. This white paper explores how CIOs can bridge the gap, create a shared language with the CFO, and deliver measurable value across the enterprise.

Why CIOs and CFOs **struggle to align**

Even with the best intentions, CIOs and CFOs can struggle to work as a team because of:

Misaligned KPIs

- CIOs are measured on uptime, availability, and security, while CFOs are judged on margins, compliance, and shareholder value.

Fragmented data

- Data resides across ERP, HCM, and CRM systems, which don't talk to each other.

Internal misconceptions

- IT is seen as a cost center, Finance as a blocker to innovation.

Organizational limitations

- Budget constraints, cost pressures, and legacy point solutions.

These factors leave CIOs no choice but to be reactive instead of driving strategy. Bridging these barriers requires a platform that unifies data, optimizes spend, and aggregates insights across systems, functions, and regions.

57% of CIOs cite budget constraints and cost optimization as top priorities — reinforcing the need for a shared planning platform that eliminates redundancy and enables reinvestment opportunities¹.

¹Morgan Stanley 4Q 2024 CIO Survey, N=100 NA & EMEA CIOs

Desired outcomes: Aligning CIO and CFO priorities

CIOs and CFOs share a common goal — achieving modernization across the enterprise that aligns with strategic targets and business goals. Developing this shared vision requires you to remove or eliminate disparate data sources and data silos.

When CIOs and CFOs align on a single planning platform, the impact is immediate and enterprise-wide. IT spend is optimized, redundant tools are eliminated, and planning cycles become faster and more consistent. Instead of debating versions, you gain a single connected plan that combines revenue, supply, and financial targets in one environment.

The practical benefits include:



Improved performance and productivity across the enterprise



Streamlined access to large data volumes with faster, easier analysis



Consistent visibility that eliminates fragmented reports and data silos



More agile workflows that adapt quickly to shifting priorities



Cost-effective operations guided by proven best practices



Turning alignment into **accountability**

The ability to view the business through one single source of truth provides CIOs and CFOs with the accountability and transparency to drive better outcomes. This shift inspires the same approach across the organization.

A shared planning environment builds trust in the numbers, giving both leaders the confidence to present a unified view of performance. That confidence shifts conversations from defending data to aligning on strategy.

Instead of finance and IT teams making decisions in isolation, leaders engage in open discussions grounded in the same facts and forecasts. A shared platform also “dollarizes” technology and innovation decisions, giving CIOs a clear financial baseline to justify spend and secure board confidence.

This alignment transforms perceptions. For the CIO, it marks a shift from being perceived as a cost center to being recognized as a growth partner who guides disruption, AI adoption, and enterprise strategy.

And the CFO is no longer seen as a brake on innovation. Instead, you are both viewed as strategic leaders who can justify investments, safeguard financial health, and accelerate innovation at the same time.

The result is stronger relationships, faster consensus, and a more collaborative mindset that extends well beyond the executive team.

Tangible impact on business performance

When CIOs and CFOs work from a shared platform, both leaders elevate their impact.

Together, you and your CFO create a unified vision that balances innovation with discipline and drives measurable enterprise value.

CIOs:

- **Replace fragmented** point tools with an enterprise-connected planning platform
- **Optimize IT** spend and surface opportunities for reinvestment
- **Focus on process** improvement and innovation, not data wrangling
- **Prove the ROI** of technology investments in financial terms the board understands
- **Ensure governance** with common security and data guardrails for a single source of truth
- **Shift perception** from systems manager to strategic leader

CFOs:

- **Gain visibility** into the financial impact of digital initiatives
- **Accelerate approvals** by linking investments to business outcomes
- **Improve forecast** accuracy with a single source of truth
- **Reposition finance** as a growth partner, not a blocker

60% of CIOs plan to consolidate IT services in 2025, underscoring the urgency of unifying planning on a single, scalable platform.²

² Morgan Stanley 4Q 2024 CIO Survey, N=100 NA & EMEA CIOs

How Anaplan makes alignment **a reality**

As a core SaaS planning platform, Anaplan delivers a single source of truth across ERP, HCM, CRM, and other systems. It aggregates insights across functions and regions so leaders can see the enterprise in one view.

Architected to scale, the Anaplan platform supports enterprise complexity while remaining flexible enough to adapt to changing priorities. And because it is composable, organizations can expand from one use case to many, without the risks of clunky integrations or costly upgrades.

This allows CIOs to express technology decisions in financial terms, elevating your role from systems manager to strategic business leader. For CFOs, it creates trust in the numbers behind technology investments and accelerates approvals for strategic initiatives. Across the enterprise, leaders gain a connected plan that unifies revenue, supply, and financial targets in one environment.

The result is shared accountability and measurable outcomes.

Because Anaplan is composable, you'll see value faster. CIOs can integrate without complex custom development; CFOs can expand use cases as needs evolve for faster time-to-value.





Navigating AI and workforce agility together

AI has shifted from experimentation to expectation. Boards look to CIOs to embed predictive and generative intelligence responsibly, while CFOs demand proof that investments deliver measurable value. Without alignment, AI risks becoming another costly experiment.

At the same time, both leaders are accountable for workforce agility. As digital skills and business needs evolve, CIOs and CFOs must ensure capacity, costs, and capabilities remain in balance.

With Anaplan, CIOs and CFOs can:

- **Embed AI directly** into enterprise planning with transparency and governance
- **Link digital and workforce** investments to financial outcomes
- **Run real-time scenarios** that anticipate disruption and guide responsible adoption

This ensures innovation doesn't just move fast — it moves responsibly, with both technology and finance leaders accountable for growth, resilience, and trust.

Anaplan: The platform built for CIO/CFO leadership

Anaplan is more than another planning tool — it is the next essential planning platform: a cloud-native, AI-infused SaaS solution designed to unify strategic, financial, and operational planning at enterprise scale. By connecting data and decisions across finance, IT, HR, sales, and supply chain, it gives CIOs and CFOs a single, trusted view of business health.

With these capabilities, you can rationalize software, prove ROI on innovation, and give your CFOs the confidence to tie investments directly to EBITDA and margin impact.

Together, you gain the clarity to fund innovation, protect margins, and steer the enterprise with confidence.

What sets Anaplan apart:

- **AI-infused planning:** Embedded predictive forecasting, optimization engines that can evaluate billions of scenarios, and agent-driven automation to accelerate decision cycles.
- **Seamless integration:** Flexible connectors across ERP, CRM, and HCM eliminate silos without brittle custom integrations.
- **Enterprise resilience:** Built to scale securely, supporting complex governance, compliance, and audit requirements.
- **Strategy to execution link:** Unlike finance-only or IT-only tools, Anaplan uniquely connects business strategy with operational execution, ensuring alignment with company goals.

Ease of adoption is also a top buying criterion — 25% of CIOs rank it among their top three — making composability and fast time-to-value critical³.

³Survey of N=54 AMER & EMEA CIOs and N=6 CIO direct reports, conducted in May-June 2025

Getting started

Your influence as a CIO depends on more than managing IT — it comes from shaping strategy, proving ROI, and leading change alongside Finance.

With Anaplan, you can align your priorities with Finance, accelerate adoption, and demonstrate impact within weeks, not years — building a foundation for long-term agility, trust, and measurable business value.



Learn more about how Anaplan helps CIOs and CFOs lead together. 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

