

WHITE PAPER

Beyond gut instinct: The new era of enterprise intelligence

How connected AI redefines
enterprise planning, one
decision at a time



/anaplan

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3 key roles — 3 separate planning predicaments

It's Monday morning at a global enterprise. Finance, supply, and sales teams are heads down, grappling with their own sets of data. They share one important concern — how to drive revenue in a high-pressure, fast-changing market.



Eleanor, the CFO, is under pressure to tighten budgets and boost productivity, but forecasting cycles are slow, and she lacks real-time visibility into how supply disruptions or market fluctuations impact financial targets.



Robert, the Head of Supply Chain, is struggling to align demand with constrained supply. Multiple teams are running disconnected models and they're constantly reacting to delays, shortages, and sudden cost spikes.



Marcus, the Sales Director, is racing to hit targets in a highly competitive landscape. But the data he needs is buried in spreadsheets, and his team lacks timely guidance on where to double down or pull back.

In the past, our trio would have to make their decisions in silos, each focused on their own data and priorities. A lack of confidence and an abundance of contradictory data meant that for decades many enterprise-level decisions were made like this — on little more than gut instinct.

That wasn't good enough in the past and it won't fly in a world that is increasingly characterized by its volatility, complexity, and speed of change.

This is where Anaplan Intelligence comes in →

This white paper explores how Anaplan Intelligence works and what it unlocks through the lens of three leaders navigating the pressures of modern business.



Conversational AI for smarter decision-making

Anaplan Intelligence connects business functions and provides conversational access to generative insights and analysis through role-based agents. These agents allow your teams to instantly understand how decisions in one area impact outcomes across the entire business.

Because it's context-aware, Anaplan Intelligence understands how your business really works. It reflects the interconnected nature of real-world operations, based on data across different business functions and from outside your organization.

This insight equips leaders to make faster, data-driven decisions and gives teams the agility to respond in real time to market shifts.

Let's look at how our three leaders — Eleanor, Robert, and Marcus — gain the clarity and speed they need to make high-impact decisions by using Anaplan Intelligence, no matter how complex the landscape.

Anaplan Intelligence isn't just AI layered on top of the Anaplan platform — it's AI at the core, embedded into the fabric of our enterprise planning solution.

With it, you can:

- **Remove** barriers and connect siloed systems, teams, and data
 - **Drive** continuous improvement and the next era of productivity
 - **Accelerate** time to insight, surfacing patterns hidden in the noise
 - **Enable** scalable scenario planning using AI-augmented decision-making
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Role-based agents: Smarter planning starts **here**

At the heart of Anaplan Intelligence are intelligent role-based **AI agents**, embedded directly within Anaplan applications and trained on a decade of planning expertise from millions of models.

Each agent acts like a trusted, always-available team member, ready to answer questions, generate insights, and drive better decision-making. They surface patterns humans can't easily see, highlight hidden drivers, send timely alerts, and trigger workflows to help teams move from insight to action.

The Anaplan suite of role-based agents includes:

- **Anaplan Finance Analyst** to guide finance teams with intelligent, real-time insights
- **Anaplan Supply Chain Analyst** to support operations with predictive clarity
- **Anaplan Sales Analyst** to help sales leaders plan, align, and execute at speed
- **Anaplan Workforce Analyst** to identify headcount, attrition, and hiring trends

Diagnosing the problem and setting **strategic targets**

Eleanor, the CFO, sets the plan



After reviewing the latest financial reports, **Eleanor** notices early warning signs: revenue projections are trending too low, with negative year-over-year growth and a declining three-year CAGR.

Using **Finance Analyst**, she launches a scenario planning initiative to assess the financial impact of rising tariffs and shifts in product mix.

The agent continuously monitors performance, detects plan variances, and highlights cost and profitability drivers in real time. Eleanor works with her finance team to generate multiple “what-if” scenarios. One scenario stood out — its metrics were promising, its trajectory strong.

Finance goals: Set the vision. Make it reality

- **Initiate** scenario planning
- **Align** financial targets
- **Share** strategic models with operations to validate feasibility

Next steps: With “green dot” confidence, Eleanor sets preliminary financial targets and passes the preferred model to *Robert, the Head of Supply Chain*, to assess operational feasibility. Together, they can determine the best path forward.

Making the plan **operational**

Over to Robert, the Head of Supply Chain



After receiving revised financial targets from **Eleanor**, **Robert** must determine whether operations can scale efficiently to meet them. Capacity constraints, tariff volatility, and supplier uncertainty are all front of mind.

He starts by reviewing production dashboards to flag material and capacity constraints. Using **Supply Chain Analyst** on mobile, he detects demand shifts and supplier delays in real time, flagging upstream constraints and fulfilment bottlenecks.

Within seconds, the agent recommends rebalancing actions and alternative components with better supplier ratings and lower tariff exposure. With just a few keystrokes, Robert runs impact scenarios to test production feasibility against the new targets.

He addresses supply gaps by adjusting factory shifts and rebalancing procurement plans, ensuring fulfilment without inflating costs. Then he evaluates downstream customer impact.

Supply Chain goals: **From constraints to confidence**

- **Test** production feasibility
- **Resolve** constraints
- **Collaborate** across teams in real-time to deliver with confidence

Next steps: Once the revised production plan is validated, Robert initiates an automated workflow with sales to align on demand plans, adjust regional targets, and ensure service continuity — all within a connected, intelligent Anaplan environment.

Aligning sales resources with supply chain realities

Over to Marcus, the Sales Director



Shifting production timelines and new customer opportunities mean **Marcus** needs to rethink his go-to-market (GTM) strategy — fast. With updates on products, production timelines, and new customer opportunities from Robert in hand, he jumps into Anaplan to assess the ripple effects.

Using **Sales Analyst**, he evaluates account segmentation and scoring as well as capacity planning. Marcus begins by flagging markets impacted by tariff changes. He surfaces insights through natural language queries that highlight high-priority accounts and explain why.

The agent automatically recalculates segment scores and optimizes territories, quotas, and capacity, enabling Marcus to adjust headcount and role distribution in line with updated forecasts and market potential.

Real-time account reassignment ensures the right sales representatives focus on the right opportunities.

Sales goals: Replan with precision

- **Update** segmentation in real time
- **Align** market strategy and sales capacity
- **Drive** coordinated execution across sales, supply chain, and finance

Next steps: With revised plans in place, Marcus shares the updated workforce capacity needs with HR and finance to assess affordability, validate resource availability, and finalize GTM execution.

Closing the loop between financial targets and workforce plans

And back to Eleanor, the CFO

With an ambitious GTM plan in motion, Eleanor, the CFO, needs to ensure that new workforce investments — particularly in Sales — will be financially sound. She uses **Workforce Analyst** to run workforce planning applications, project hiring timelines, and align requisitions with budgetary guardrails.

Hiring plans are integrated directly into financial forecasts, enabling real-time updates to the P&L. Eleanor validates that projected revenue gains can comfortably support expanded headcount and operational costs.

The refined scenario now reflects a 4% growth trajectory, documented and shared in reports with executive stakeholders — a complete, cross-functional view of financial viability.



Next steps: With strategic targets aligned and validated, finance, supply chain, sales, and HR move forward with confidence, closing the loop between plans, people, and performance.



A model of agile, integrated planning

With Anaplan, you don't have to be an expert to make expert decisions.

In our example, Anaplan Intelligence allowed **Eleanor, Robert,** and **Marcus** to uncover hidden patterns in data and turn them into confident, high-impact decisions.

By connecting data across the business, Anaplan creates a single source of truth that uses embedded AI to fuel smarter, faster planning.

Predictive and prescriptive capabilities forecast outcomes and optimize resources, while generative intelligence surfaces insights and recommendations in real time. Agentic AI then orchestrates workflows and automates actions, turning plans into coordinated execution.

In today's fast-moving environment, successful planning must be dynamic, collaborative, and AI-powered. With Anaplan Intelligence, scenario planning becomes an enterprise-wide capability — not just a finance exercise — driving resilience, alignment, and competitive advantage at scale.



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

