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Anaplan Workflow

Automate and Act with Confidence and Speed

Executive summary

With the rise of hyper-automation as a key enabler of digital transformation, Anaplan Workflow empowers businesses by **digitizing their planning processes** and automating with other systems while speeding time to action through **efficient and effective conversation**.

Workflow enhances business planning by improving efficiency across the business with robust processes to spark meaningful two-way communication, allowing users, data and tasks to come together in real-time. With Workflow, businesses can orchestrate a wide range of tasks that are unique to their teams and unlock the full potential of Connected Planning within the company and their extended ecosystem.

With Workflow functionality, business users can execute on different projects and processes quickly by reducing coordination overhead. Users of all levels of expertise can quickly understand what tasks need to be completed and by whom. Teams can design customized, automated process flows to ensure the right actions happen at the right time, while providing visibility into the tracking and reporting on the progress of plans.

As part of the broader Anaplan vision framework, Workflow enables users to plan more efficiently and allows businesses to ensure that they execute their well thought-out plans with confidence.

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A Workflow ~		\$\$ Q	ç ? 📧					
Workflow	General management	Demand planning Q4/21 (Hierarchical task)	×					
Tasks	Enter your forecast for next	Cancel						
Open tasks	Regional Sales Forcast	Details Tasks Comments	Timeline					
Completed		LOB Supply Chain						
Created by me	Accounting Sales Construction Active Enter your forecast for next Enter your forecast for next Enter your forecast for next	Statu						
Workflows	Enter your forecast for next Enter your forecast for next Enter your forecast for next If Regional Sales Forcast If Regional Sales Forcast If Regional Sales Forcast	In pri 🔴 🔴 🜑 Start						
Templates		Jane 🔥 Workflow 🗸						ж с С . ш
Active projects		Workflow	Open tasks				٢2	Filters Clear all ×
Completed projects	Finacial accounting 평권 방관 방관 방관 방관	Tasks	Q Find a task			26 tasks		✓ Status O Not started 22
		Open tasks Completed	Task title	Status	Due in 🗸	Assigned by 💙		 ☑ In progress 4 ✓ Due date Clear
		Created by me	Review Quota Change	D In progress	🗢 2 days	John Smith	E 2	Select a value
		Workflows	Enter OPEX Budget	D In progress	🛕 1 hour	Alice Whiteside		Created by Q. Ex: John Smith
		Templates	Submit Department Budget	In progress	6 hours	Greg Nelson		Suggested Aaron Rogers
		Active projects Completed projects	Approve Forecast Numbers	D In progress	3 days	Jane Lewis	E 3	Bucky Ball Charlie Oppenheimer
			Review Regional Sales	Not started	3 days	Peter Taylor		Diego Garcia
			Enter Sales Forecast	 Not started 	3 days	Alice Whiteside	E 2	
			Review Quota Change	 Not started 	1 week	Greg Nelson		
			Enter OPEX Budget	 Not started 	2 weeks	Jane Lewis	E 1	
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Structured and flexible automation

by digitizing your processes and automating with other systems*:

- Management: Individual and Group tasks, Task actions, Multi-step tasks, Hierarchical tasks and notifications
- Linear Workflow: Linear Workflow templates and audit trails
- Planning Projects



 $^{*}\mbox{These}$ features are currently in alpha and are targeted for Early Access in the later half of 2022



*These features are available

Efficient and Effective Conversations

and Decisions to speed time to action*:

- Notify actions to prompt and guide users when it's time to act
- @Mention users and trigger appropriate notifications to alert the right people to facilitate smooth handoffs
- Slack integrations to reach new users via Slackbot
- Commenting functionality and Comment Summary Views to keep up with conversations at a glance
- Easily share boards and worksheets to drive seamless collaboration

About Anaplan

Anaplan (NYSE: PLAN) is a transformative way to see, plan, and run your business. Using our proprietary HyperblockTM technology, Anaplan lets you contextualize real-time performance, and forecast future outcomes for faster, confident decisions. Because connecting strategy and plans to collaborative execution across your organization is required to move business FORWARD today. Based in San Francisco, we have 20 offices globally, 175 partners and more than 1,750 customers worldwide.

To learn more, visit anaplan.com