



# PLANNING, BUDGETING, AND FORECASTING

Finance is expected to do more with less, producing greater detail with fewer errors, and in less time. Standalone spreadsheets and complex systems only add to the pain. You need structure, speed, consistency, collaboration, and accuracy in your financial planning process. With Anaplan's planning and budgeting app, you can create and connect business user-friendly plans and formulas with financial and operational drivers—at scale and across your entire enterprise.



**Create connected plans fast.** Get your planning basics done quicker, more accurately, and with less effort across plans, budgets, forecasts, and reports—all in one connected system. Anaplan links financial, sales, and operational plans together for seamless big-picture financial planning and analysis across your enterprise.

**Model any scenario, dimension, and time.** Easily build and compare scenarios that represent your business—aggressive, conservative, “what-if,” and more. Create unlimited dimension hierarchies and lists, modeling changes with drag-and-drop, no code or batch wait time required. Plan by any time bucket—day, week, month, and year.

**Flexible, driver-based plans and forecasts Forecast with financial or operational drivers that matter.** Create models to reflect nuances for goods, services, subscription (ACV, ARR), or other. Create plans that answer complicated questions only answered through real-time collaboration—all on a single connected platform..

## KEY BENEFITS

- Reduce cycle time and effort of planning, budgeting, and forecasting
- Take control and own the process, eliminating dependence on spreadsheets and IT
- Drive collaborative “big picture” with connected plans across Finance, Sales, Operations, and HR
- Increase accuracy and target achievement with driver-based models, real-time calculations and automatic rollup across plans and reports
- Increase plan precision with broad collaboration and point-of-impact participation
- Seamlessly align strategic plan, corporate plan budget and forecast, top-down and bottom-up
- Jumpstart time to implement through pre-built accelerator apps for planning, budgeting, forecasting, consolidation, and reporting

## PANDORA®

Pandora Radio, a music streaming and automated music recommendation service, uses Anaplan to manage its complete FP&A solution in an integrated workspace, including long-range planning, monthly reporting, financial reports, and workforce planning.

### Benefits

- Increased collaboration across departments with cloud-based solution
- 100% business self-service where users, not IT or consultants, manage development
- Able to easily expand toolset to coincide with growth of company and market

# Key Features

## Planning, budgeting, and forecasting

- Enterprise cloud planning for strategic and corporate plans, annual budgets, and forecasts
- Driver- and assumption-based plans for consistent alignment organization-wide
- Role-based, secure access for relevant plan entry, clear accountability, and informed decisions
- Plan by any time bucket—day, week, period, year
- Support for plans in different currencies
- Break-back entry shortcut (historical, seasonal, 4-4-5) for fast, accurate plan calculation and update

## Top-down and bottom-up

- Dynamically cascade strategic plans by key dimensions to align plan, budget, and forecast
- Build budgets bottom-up while viewing targets to improve collaboration and reduce iterations

## Versions and scenarios

- Multiple versions for comparison, with centralized control for consistent versioning company-wide
- Unlimited scenarios for proactive comparative insight and better choices

## Flexible, user-owned business rules

- Simple, real-language formula creation—no coding
- Drag and drop for different hierarchy rollups, add new currencies, change chart of accounts, update business rules—no dependence or burden on IT

## Modeling, analysis, and “what-if”

- Easily create complex models and “what-if” scenarios on-the-fly that answer complicated financial questions and span multiple areas of the business

## Revenue forecasting

- Revenue planning for any business model—recurring, contract, license, product sales volume professional services, membership, etc.
- Flexibility to support changing revenue recognition standards required during planning stages

## Personnel planning

- Plan for headcount at group, role, or individual level to drive the details important to your business
- Split, transfer, and adjust headcount across hierarchies (business units, regions, projects)
- Automate key calculations (FICA, FUTA), benefits, and salaries for fast, accurate, consistent plans

## CAPEX planning

- See real-time impact of capital plans across P&L, balance sheet, and cash flow
- Plan by different depreciation methods and payment plans

## Other forecasting—rolling and cash

- Make periodic and rolling forecasts with a simple “copy” function
- Support for cash-flow forecasting to model cash-in-and-out impact of decisions before they are made

## Reporting and dashboards

- Complete financial reporting (P&L, balance sheet, cash flow) across plan, actuals, and forecast for real-time, integrated reporting
- Pivot reports by any dimension (time, geography, product) for custom, no code, views on-the-fly
- Visualizations add relevance and at-a-glance understanding to data with maps, charts, graphs, waterfall, alerts, and more

## Integrated business planning

- One common platform enables integrated planning with apps and processes across Finance, Sales, Operations, and HR

## Data integration with other systems

- Flexible options to match customer needs: Anaplan Connect, APIs, MuleSoft, Dell Boomi, or SnapLogic
- Fast and easy import/export via spreadsheet

## Microsoft Office™

- Microsoft Office add-ins for seamless plan and report export to Excel® workbooks, PowerPoint® presentations, and Word® report books
- Enter budget offline via Excel add-in, accurately and automatically pushing back into Anaplan with a click

## Audit trail

- Track and review history of versions, scenarios, and user activity



### About Anaplan

Anaplan is the enterprise planning cloud. Anaplan brings together an unrivaled planning and modeling engine, collaboration in the cloud, and a simple interface for business users. Anaplan customers can choose from over 100 pre-built planning apps from the Anaplan App Hub, or easily build their own apps. Anaplan is a privately held company, headquartered in San Francisco, CA, with global offices on four continents. To learn more, visit [anaplan.com](https://anaplan.com). Follow us on twitter: [@anaplan](https://twitter.com/anaplan)