

Use case

- Workforce planning and management

Challenge

- Utilized an extremely manual and time-consuming home-grown, Excel®-based tool for workforce planning that required 30+ hours per week to record, reconcile, and manage headcount data originating from disparate systems
- Weekly headcount reporting
- Lacked an agile planning tool to execute workforce planning and management

Solution

- Department-level tailored workforce models owned by planning teams that streamline updates from system-of-record data sources for business and planning teams to receive and act upon
- Daily headcount reporting
- Real-time configuration changes easily completed

Results at a glance

- Weekly hours required to manage the workforce planning process reduced from 30+ to less than 10, freeing up time for value-added processes instead of consolidations
- Cloud-based access to the same set of data means easier collaboration across the business
- System-of-record data origins are now clear, providing team with ownership of both source data and satellite model information
- Planning teams can modify a formula or create an additional attribute with no system downtime



Tableau boosts workforce planning operations with Anaplan

Introduction

Tableau helps people see and understand their data. In order to accomplish this for itself, Tableau needed accurate and readily accessible workforce planning and management data, as well as a scalable solution that provided one single, consolidated source of headcount data. However, the company was encumbered by the tools available at the time—primarily spreadsheet-based—for consolidating and reconciling data from disparate systems for each piece of the headcount planning and management cycle.

Before Anaplan

The Tableau Business Operations team is a cross-functional group within the company that provides project support to various departments, including Finance, Marketing, Engineering, Sales, Operations, HR, and Recruiting.

Prior to implementing Anaplan, the Business Operations team gathered outputs from an external human resources information system (HRIS) platform, an external recruiting platform, and planning team trackers—and combined them in a homegrown, Excel®-based workforce planning tool. This process became increasingly time consuming, requiring more manual maintenance as the company grew.

Originally, the tool required up to eight hours per week to update. But with the company's rapid headcount growth (including an increase of over 50 percent in 2015), the process time had increased to over 30 hours a week to complete updates and reconciliations. Data came from many sources and across different time frames, requiring continuous efforts to chase down the teams responsible for each part of the workforce planning process just to understand the data.

First, Tableau decided to upgrade their HRIS to Workday. "We were excited about Workday and assumed that would act as our central repository for all headcount-related information," recalled Roya Williams, Senior Manager, Business Operations. "However, we soon found that while Workday functions exceptionally well as an HRIS tool, it's not intended to execute workforce planning. This was when we realized we needed a more agile planning tool."

Selection process

Tableau needed a workforce planning solution that maintained a single headcount record with a variety of attributes. Additionally, the company was looking to employ a role-based planning process, versus the person-based construct that Workday's architecture requires.

Tableau's Sales Planning team had implemented Anaplan about three and a half years ago, using it as the primary tool for sales quota planning and other sales planning-related functionalities. Williams described the sales planning team as devoted Anaplaners. "They love the tool," she said. "And we liked that we could broaden the use of a successful platform already implemented within the company. We quickly realized the agility that Anaplan offered compared to its competitors."

"Within a few weeks, a user could learn the product, become self-sufficient, and begin building models," shared Williams. "Other tools required us to consult a third party to build an API for every model-to-model integration. As a business planning platform, Anaplan facilitated this integration between models natively—we wouldn't need to use a third party since Anaplan already encompassed that functionality."

Implementation and deployment

Thanks to assistance from Anaplan's Customer Success team, Erin Hoff, a Business Operations Analyst at Tableau, quickly ramped up on Anaplan—from understanding the foundation of a model and model building, to mastering planning functionality in the new system. In four weeks, she began to build models independently.

Hoff then looked to incorporate Anaplan into Tableau's existing process flow involving the Workday and Taleo systems. After architecting the Anaplan dashboard templates and processes, Hoff implemented the data import and export processes between Workday, Taleo, and the export file satellite models. "What I was able to do in that short amount of time was pretty amazing," said Hoff.

Benefits and ROI

Using Anaplan, the Business Operations team now receives daily data updates. Additionally, Anaplan clearly shows what data is coming from which team and provides variance reports to flag when there are data discrepancies. As the scope of workforce planning continues to expand, ownership of data plays an instrumental role in agility. The business no longer spends 30 hours per week manually compiling information; instead, the number of hours dedicated toward managing the workforce planning process is now in the single digits.

The Business Operations team values Anaplan's self-reliance, flexibility, and customization features. Because Anaplan can do inter-model integrations, they can easily make real-time configuration changes. Planning teams can add leaders' requests to modify a formula or create an additional attribute without any system downtime. The Business Operations team also was able to build the product so that different planning teams can run their own models, maximizing the platform's ever-valued agility. Finally, the ability to use Anaplan as a central place for company-wide data has amplified team collaboration by allowing access to real-time consolidated workforce planning information across the business.

"Anaplan works well for our planning teams," Williams concluded. "The tool creates a clear sense of where data should originate, and gives our team ownership of both that data and the satellite models themselves."

What's next?

Tableau's Business Operations team has set major planning goals around the use of Anaplan. Collaboration of data between Anaplan and other solutions continues to be a focus in Hoff's and Williams' evolution of the company's workforce planning platform. They plan to evolve the maturity of their Anaplan integrations from the current .csv flat file automated with Anaplan Connect, to receiving information directly from Workday and Taleo.

Additionally, they want to increase collaboration between Anaplan and Tableau. They are already using their company's data visualization tool to present information calculated by Anaplan. Williams and Hoff are currently using Anaplan Connect scripts in conjunction with a task scheduling tool to export data via .csv flat file from Anaplan to the Tableau local area network (LAN). They then publish that .csv file to Tableau Server. Given the volume of data exported, the next steps are to improve the export performance by utilizing Informatica or partnering with Anaplan to create a direct Anaplan to Tableau connector.

The Tableau planning team has already decreased the number of hours per week spent maintaining data by 80 percent. Using Anaplan, the teams aim to eventually spend less than 50 percent of the original hours spent per week managing and maintaining the platform—and getting there means driving self-service. "We want to give people across the company access to data, and integrate that data among the portfolio of solutions and tools that are currently used," Hoff said of her team's long-term goals.

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