



## Use cases

- Headcount planning
- Workforce optimization
- Workforce planning

## Challenge

- Utilized extremely a manual and time-consuming home-grown, Excel-based tool for workforce planning
- 30+ hours per week spent on recording headcount data
- Lacked an agile planning tool to execute workforce planning
- Unable to view data source or workforce planning process owners

## Solution

- Daily data updates received by HR business operations team
- Data sources and workforce planning process owners now visible by team
- Real-time configuration changes easily completed
- Ability to run customized models by each planning team

## Results at a glance

- Hours required to manage the workforce planning process reduced from 30 hours per week to fewer than 10 hours per week
- Planning teams can modify a formula or create an additional attribute with no system downtime
- Team collaboration increased because of access to real-time consolidated workforce planning information across the business
- Data origins are now clear, providing team with ownership of both source data and satellite models



# Tableau boosts HR business operations and workforce planning with Anaplan

## Introduction

Tableau's cloud software helps organizations bring their data to life by producing interactive data visualization products focused on business intelligence. With the mission of making data accessible and digestible to their customers, Tableau lives for accurate data, yet still struggled to model its own sales planning data. Additionally, its own workforce-related data—particularly existing, requested, and forecasted headcount by role and related costs—was and remains an area of continuous focus for the company. Tableau needed a solution that would flag the roles that impact strategy and tactical delivery of goals.

## Before Anaplan

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

Prior to implementing Anaplan, Roya Williams, Senior Manager of Business Operations, and Erin Hoff, Business Analyst, used ADP as Tableau's human resources information system (HRIS) alongside a homegrown, Excel-based workforce planning tool, which required increasingly more time-consuming, manual maintenance as the company grew.

Drawing from Tableau's source systems, the workforce planning tool recorded current and forecasted role-based headcount data. Williams and Hoff compiled this information, tracked status changes, and used the data to create a series of Excel-based reports. However, although they were able track a role from requested to forecasted, the process was incredibly manual—and the amount of manual effort required increased exponentially as Tableau's headcount grew.

Originally, Williams and Hoff spent three hours a week to update the tool. But after several years of rapid headcount growth (including an increase of over 50 percent in 2015), the procedure required over 30 hours a week to complete. Williams and Hoff spent much of these 30 hours simply ensuring that one system matched the other. Data came from many sources and across different time frames, leading Williams and Hoff to constantly chase down the teams responsible for each part of the workforce planning process just to understand the data.

Tableau decided to start over with a better foundation, upgrading their HRIS from ADP to Workday. "We were excited about Workday and assumed that would act as our central repository for all headcount-related information," recalls Williams. "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 allowed Williams and Hoff to attribute any one record with a variety of statuses. Additionally, the company preferred a role-based rather than person-based system, which the Workday architecture requires.

Tableau's HR team knew that the company's sales planning team had implemented Anaplan about three and a half years ago, using it as their primary tool for sales quota planning and other sales planning-related functionalities.

Williams and Hoff describe the sales planning team as devoted Anaplaners. "They loved the tool," says Williams. "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," continues Williams. "Other tools required us to consult a third party to build an API for every model-to-model integration. Anaplan facilitated this integration between models natively—we wouldn't need to use a third party since Anaplan already encompassed these tools."

Anaplan's compatibility with Workday was the final deciding factor that drew the HR team to the system. Tableau could implement Anaplan without the risk of interrupting the ongoing transition of ADP to Workday.

## Implementation and deployment

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

Hoff then incorporated Anaplan into Tableau's existing Workday and Taleo integrations. After architecting these integrations, Hoff implemented the connections between the Workday, Taleo, and export file satellite models. "What I was able to do in that short amount of time was pretty amazing," says Hoff.

## Benefits and ROI

Using Anaplan, the HR Business Operations team now receive daily data updates. Additionally, Anaplan clearly shows what data is coming from which team. As the scope of workforce planning expands with each quarter, ownership of data plays an instrumental role in agility. Williams and Hoff no longer spend 30 hours per week manually compiling information; instead, FTE hours dedicated toward managing the workforce planning process are now in the single digits.

Williams and Hoff value Anaplan's self-reliance, flexibility, and customization features. Because Anaplan can do inter-model integrations, they can do new real-time configuration changes easily. Planning teams can add leaders' requests to modify a formula or create an additional attribute without any system downtime. Tableau 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 amplifies team collaboration by allowing access to real-time consolidated workforce planning information across the business.

"Anaplan works well for our planning team," Williams concludes. "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 HR Business Operations team has set major planning goals around the use of Anaplan. Williams and Hoff are currently using an ETL (export, transform, load) to set up scheduled exports. Today, teams are able to drop files onto the local area network (LAN) so that Tableau's Scheduling and Orchestration Task Manager can upload that information onto the Tableau server. The HR team hopes to start using Anaplan Connect or an ETL to import information from Anaplan to the LAN.

Collaboration between Anaplan and other solutions continues to play a major role in Hoff's and Williams' preference for the platform. They plan to build Anaplan to receive information directly from Workday. Additionally, they want to increase collaboration between Anaplan and Tableau, using their company's data visualization tool to present information calculated by Anaplan.

The HR planning team has currently decreased the number of hours per week spent maintaining data by 80 percent—and continue to reduce this time daily. Using Anaplan, Hoff and Williams aim to eventually spend only 40% of the original hours spent per week managing and maintaining the platform.

"We want to give people across the company access to our data and integrate between as many models in the company as possible," Hoff says of her team's long-term goals. "Our next step will be to work with teams that haven't yet implemented Anaplan and figure out how we can get there faster."

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## About Us

Anaplan is driving a new age of connected planning. Large and fast-growing organizations use Anaplan's cloud platform in every business function to make informed decisions and drive faster, more effective planning processes. Anaplan also provides support, training, and planning transformation advisory services. To learn more, visit [anaplan.com](https://anaplan.com). Follow us on twitter: @anaplan