



Getting ahead of disruption around the corner

Your Connected Planning Center of Excellence for better decision-making

Anaplan

Business leaders are long accustomed to change and the need for digital transformation. Particularly more so in more recent years, where innovations in technology, tightening government regulations, and new competition contribute to an expansive scope of changes that affect nearly every enterprise. In many ways, disruption no longer seems quite so disruptive—it's an everyday expectation with the technology evolution of every company.

Yet the pace at which change occurs churns increasingly faster and keeping up is more demanding than ever: businesses need to adapt to change quicker, react more nimbly to unexpected market events, and make thoughtful, perceptive, and data-driven decisions all while advancing their digital agenda to keep stride.

The value of enterprise planning is already widely recognized for its foundation in data-driven decision-making and is critical during times of transformation. *A recent study commissioned by Anaplan* found that 97 percent of businesses surveyed perceive planning to be critical for enhancing revenues, optimizing resource allocation, and converting strategies into actions. Its importance is so significant, in fact, that 74 percent of companies surveyed plan more frequently today than they did just five years ago.

There's even better news. Businesses today have a lucrative opportunity to strengthen decision making even further—increasing agility, driving profitable growth, and gaining a competitive edge—through improvements to its existing planning process with technology that support their digital transformation journey.

Everybody plans: Why better business planning goes beyond finance

Planning—and even more specifically, the outcomes of planning, such as annual operating plans and budgets—has historically been a discipline owned by a company's finance organization and is often manually managed. While organizations strived to make this process more collaborative over the years, it often remains

a linear process with minimal visibility to critical, cross-functional information.

What's more, because the finance organization has traditionally carried the brunt of the planning process, best practices are not always rolled out to the rest of the company—even though planning impacts all business functions.

Consider successful sales organizations, for example, which are the result of good planning. Sales leaders work closely with human resources, finance, and marketing for territory and quota planning, incentive compensation planning, and full go-to-market planning. With the speed of the market, this planning needs to happen faster and must be facilitated with the technology that allows companies to act faster with confidence.

As more collaborative planning processes spread throughout the enterprise, business leaders are naturally looking for ways to adopt a centralized and consistently governed planning framework that can address the collective business needs of today while providing forward-looking insights for future decision-making.

This is Connected Planning.

Connected Planning accelerates business value by transforming the way organizations make decisions and places the power of planning in the hands of every individual—at every level—within and between organizations with a platform that helps to digitize manual processes and bring together point solutions. While Connected Planning looks different for every business and every unique environment, all roads to its fruition share a common need for governance, consistency, and efficiency.

This has resulted in a growing need for a Connected Planning Center of Excellence (CoE), led by a Chief Planning Officer (CPO), to orchestrate cross-departmental planning and decision-making as every company continues its digital evolution. The importance of the CPO cannot be overlooked—this function helps to ensure that the best practices of planning are applied consistently across the organization, which eliminates mere pockets of planning excellence.

Anaplan on Anaplan: Connected, not chaotic, planning

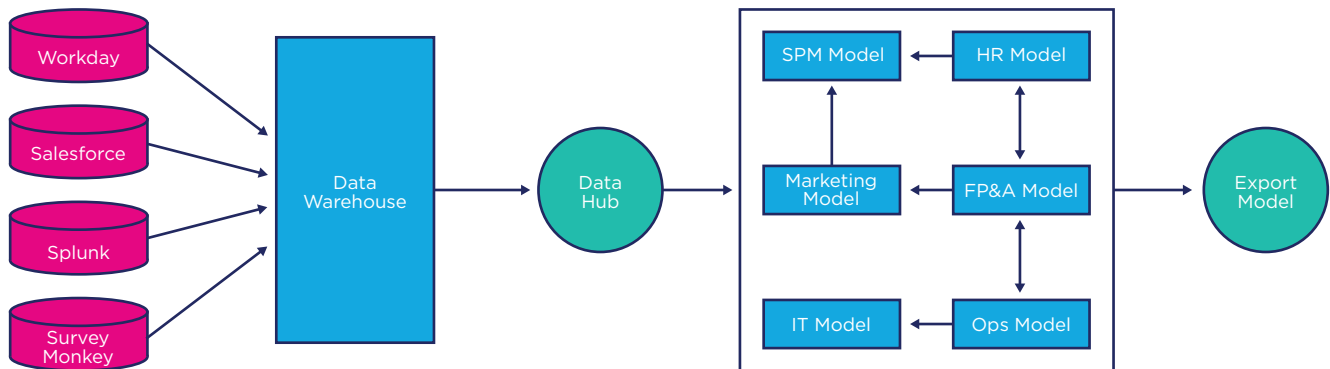
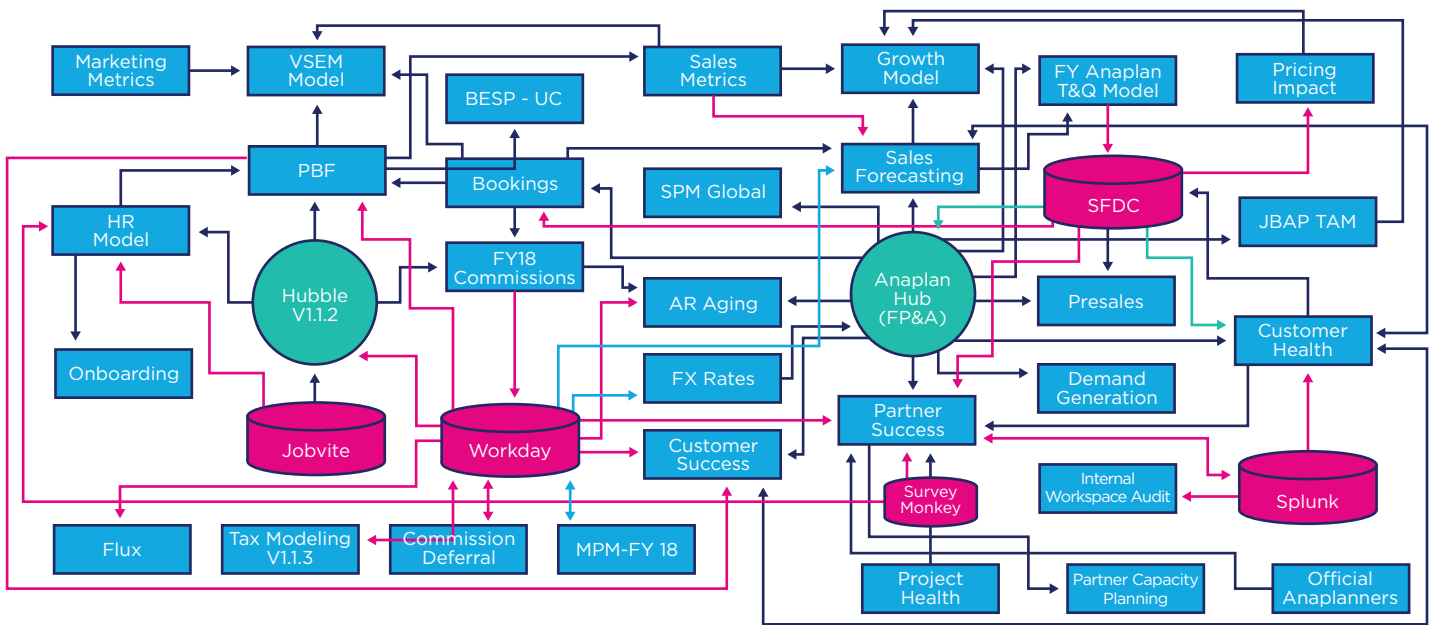
No company demonstrates the value of Connected Planning better than Anaplan. Our road to Connected Planning, like many organizations, meant that we needed better governance and adherence to best practices as we leveraged more and better technology to make decisions faster.

Unfettered access to the Anaplan platform made it easy for our teams to build new and different models, and eventually, we had to reconsider how we could better improve consistency and efficiency. The Anaplan platform's greatest

strength of flexibility and adaptability could have also become a potential weakness without the creation of a stronger governance system.

By developing our own Connected Planning CoE by leveraging the company's Anaplan on Anaplan (AoA) organization, we saved our finance, sales, marketing, and accounting teams over 100 hours every quarter by reducing our monthly and quarterly close process. Further, we employed data automation that not only increased our data quality and consistency but saved us upwards of 70 hours of data collation every month.

Connected, not chaotic, planning



What is a Center of Excellence?

A CoE is the foundation for enterprise-wide Connected Planning, a better way to accelerate business value by connecting people with plans and data, so they can harness the true power of their enterprise with speed and agility.

Made up of an in-house team of subject matter experts and cross-functional planning champions that share best practices within an organization, the primary focus of a CoE is to create, foster, and scale a high-performing Connected Planning ecosystem that aligns key company priorities with strong, day-to-day operations.

When it comes to investing in a CoE, organizations are advised that it is better to start early than to start late. At Anaplan, we advise our customers to create a CoE immediately after the first implementation of the Anaplan platform and before beginning additional implementations.

The sooner an organization establishes a CoE, the sooner it can begin to build Connected Planning “muscle memory.” Thinking laterally across departments is not natural for many employees. Rather, it is a learned behavior for people in most organizations. In fact, it is one of the hardest hurdles to overcome when trying to implement Connected Planning.

By designing a CoE from the outset, your organization will be able to establish and *build upon a shared Data Hub* of qualified and validated data and metadata. This Data Hub connects your people and departments to the same data no matter where they are or what they are trying to do.

The result is greater transparency and control over the quality and the flow of information, as well as increased business speed and agility, which enables decision-makers to identify, synthesize, and course correct in near real-time versus weeks or months after the fact. Through every phase of a company’s transformation journey, a CoE offers the consistency and support to maintain the required pace of business.

At Anaplan, the fundamental way that we envision companies realizing a sustainable and scalable return on investment with Connected Planning is through the adoption of a strong CoE framework.

Six benefits of having a Center of Excellence

Adopting a Connected Planning approach is a critical investment for any enterprise. Think of the CoE like an insurance policy for that investment. Its governance and success can help ensure that your business receives the maximum performance and benefits from Connected Planning.

The top six benefits that a business can anticipate through the establishment of a robust CoE include:

1. Maintaining quality and control

Many organizations significantly increase their use of the Anaplan platform after rolling out initial use cases. Connecting plans across the enterprise is a natural step in establishing a dynamic, intelligent, and collaborative process and ensuring a strong alignment between strategic corporate objectives and departmental planning processes.

As Connected Planning expands, many different groups may own the implementations of individual use cases that are connected across a number of models. These implementations may be built by an internal team, an Anaplan Customer Success team, an implementation partner, or a combination of all three. In the push to expand Connected Planning, inevitably the question arises: “How do I ensure uniform quality and consistency across all of these various implementations run by different teams?”

With every advancement made within business units, maintaining control of technology can become increasingly critical. Creating a CoE can help maintain quality and oversight over an enterprise’s use of the platform, including the implementation of new roll-outs, training of new users, standardization of naming conventions and best practices, and the coordination of a centralized team of internal experts.

2. Ensuring consistency

A CoE can help ensure that four key elements stay consistent:

- **Data and metadata:** A CoE can help eliminate duplicate data and avoid shadow integration processes through active governance of an enterprise's use of the platform and its inputs. A CoE ensures that all variables and metrics tracked in upstream systems remain consistent in downstream planning systems, including the adoption of a common definition of metadata and standardized calculation formulas throughout separate local planning models.
- **Model design:** Reliable model design can be achieved by providing documented best practices in model architecture, calculation, performance optimization, and usability across the various Anaplan models deployed in the organization. Enterprises can increase consistency with generally accepted best practices by adopting the *PLANS and DISCO methodologies* in their model structures.
- **Processes:** A CoE promotes the uniform execution of business processes and methodologies. By involving the business SMEs, a CoE ensures that planning solutions fully meet the needs of the departments and functions that rely on them. It also allows every decision-making process in a company's digital transformation journey to align and come together for beneficial results.
- **User experience:** New users can expect a similar experience across each *model and dashboard they interact* with as they have all been developed and deployed using the same process and guidelines.

3. Fostering an environment of knowledge-sharing

Creating a CoE promotes knowledge sharing and collaboration within your organization and can be responsible for initial and ongoing training for business users in the platform. It can also be responsible for maintaining the business processes, procedures, and best practices that the organization uses.

For example, a CoE can ensure that consistency within "what-if" planning, scenario optimization, and historical comparison best practices are adopted across the organization.

4. Enabling upstream and downstream efficiencies

The creation of a CoE can empower the organization to develop more upstream and/or downstream processes to facilitate their use of the platform. For example, an organization may first deploy a territory and quota model, and then decide to develop an upstream HR-based model that contains employee details and compensation data to manage their sales team.

The potential for expanding both upstream and downstream use from an initial model in the Anaplan platform is endless and offers the opportunity to reimagine existing processes for greater efficiencies.

5. Encouraging internal innovation

A CoE creates a "service" to help the business become more efficient in developing, releasing, and maintaining models within the platform, supporting a business group as it builds and owns its own model.

This means that an organization may rely on an internal CoE as the single resource for implementing new applications, promoting platform use, sharing best practices, and handling all training needs, and it eliminates the time and costs required by external resources.

Further, a CoE manages everything from remedial production support and defect resolution through advanced enhancement requests and prioritizing new use-case expansion and model development.

6. Upholding centralized governance

In a centralized mode, a CoE can be responsible for maintaining a customer's use of the platform and all other necessary elements involved with the creation and maintenance of an organization's products. Its governance can also apply to activities such as naming conventions, best practices in model design and build, and when to use or not to use the platform.

A CoE has the final say in how to roll out any platform updates and developments, which further drives consistency and efficiency. It communicates the progress, update, and value of applications to executive sponsors across the organization, which highlights the value of your investment.

Supporting Connected Planning and your CoE

While Anaplan's cloud platform, and our proprietary Hyperblock™ technology at its core, is a complete solution that addresses the Connected Planning needs of enterprises, the Anaplan platform alone is not a silver bullet that puts an end to siloed planning. Connected Planning also requires connected people, which is the core objective of a CoE.

The speed of business is accelerating, and companies strive to stay agile, anticipate market changes, and gain an edge over their competitors. Additional complexities of digital transformation and the digitization of processes require strong change management. As companies look to the future, success will, in many ways, rely on the ability to make better decisions faster.

For companies that strengthen their decision-making through a Connected Planning approach, establishing a CoE can help safeguard and instill the efficiency, quality, and consistency that their organization needs for sustainable, future-driven success—all while supporting enterprise-wide transformation efforts.

Three tips for building a successful CoE

Establishing, enabling, and sustaining a successful CoE is a journey—not a destination. Like many other worthwhile journeys, you will encounter unexpected conditions and speed bumps along the way.

Here are three pillars of our CoE that allow us to foster an effective and efficient workplace:

- **Dedicate time for learning.** At Anaplan, we held office hours to help create and sustain a culture focused on learning and knowledge sharing. This allowed us to provide the business with ample opportunity to ask questions and quickly solve problems.
- **Be regular and consistent.** We see tremendous success with holding departmental workshops. Held quarterly, these workshops leverage applications that our business uses to run departments and it helps people stay familiar with our models. It also gives employees an opportunity to provide feedback, facilitates roadmap discussions, and ensures that our applications are doing what they are intended to.
- **Collaborate and connect.** Collaboration extends beyond the walls of our organization. Connected Planning peer and user groups are a great opportunity to meet up with other industry peers that are, or wish to be, leveraging a Connected Planning approach. It can help you create a close-knit community that can share best practices and lessons learned for improved strategies.

Related Content

The idea that business planning is important isn't new, nor is it surprising. C-Suite and departmental leaders have long acknowledged that business planning is paramount for steering through complexities and achieving performance targets. The data to support these assertions, however, has been limited.

Until now.

In our inaugural State of Connected Planning report, we surveyed over 1,000 planning professionals across 45 countries and 18 industries to uncover insight into how organizations accelerate business value through Connected Planning.

[Read the report](#)

About Anaplan

Anaplan (NYSE: PLAN) is pioneering the category of Connected Planning. Our platform, powered by our proprietary Hyperblock™ technology, purpose-built for Connected Planning, enables dynamic, collaborative, and intelligent planning. Large global enterprises use our solution to connect people, data, and plans to enable real-time planning and decision-making in rapidly changing business environments to give our customers a competitive advantage. Based in San Francisco, we have over 20 offices globally, 175 partners, and more than 1,100 customers worldwide.

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