





Anaplan for financial planning

In a highly volatile and uncertain business environment, agile planning and accurate forecasting are critical.

To stay ahead of the competition, finance organisations need rapid and interconnected decision-making integrated across business units and divisions; easy access to a single source of truth; visibility into risks and opportunities with advanced analytics, continuous planning, and real-time forecasting; and advanced scenario planning to inform strategy and tactical decision-making.

With Anaplan's financial planning solution, organisations can predict and adapt to market changes, optimise resource allocation to improve returns, and unlock capacity with finance teams.

Why Anaplan for financial planning?

Key benefits	Anaplan capabilities
 Speed and agility	Get real-time answers Enable faster and more insightful decision-making through real-time visibility into financial and operational outcomes Determine different BU performance drivers Deliver more precise plans that are sensitive to future uncertainty <ul style="list-style-type: none"> • Reduce offline spreadsheets and drive systematic planning in the system to improve accuracy and agility Create a no-code environment
 Flexibility and precision	Adapt quickly to changes <ul style="list-style-type: none"> • Reduce IT overhead • Increase adoption
 Easy for the business	Ensure in-platform collaboration and handoffs for all stakeholders <ul style="list-style-type: none"> • Increase visibility and accountability with a single source of truth for data and assumptions used for decision-making
 Connected and collaborative	




Expected outcomes

Predict and adapt to market changes <ul style="list-style-type: none">• Reduce/eliminate disparate and offline models, generate scenarios for analysis easily, and improve forecasting accuracy• Accelerate planning cycles and reporting to rapidly drive decision-making changes	Optimise resource allocation to improve returns <ul style="list-style-type: none">• Set high and realistic ambitions with a clear execution pathway• Optimise resources and costs through increased P&L transparency• Focus on the opportunities that matter by understanding trade-offs and ROIs	Unlock capacity for finance <ul style="list-style-type: none">• Automate processes for planning, budgeting, and forecasting• Partner across the business to deliver insights for decision-making• Allow employees to focus on valuable contributions, limiting repetitive work
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Improved experience

Up to 20% improvement forecast accuracy	Up to 2% increase in EBITDA through higher targets and resource reallocation	Up to 40% improvement in the productivity of finance
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Sample use cases in finance

 Revenue planning	<ul style="list-style-type: none">• Revenue planning toolkit accounting for levels of granularity and built-in statistical and forecasting tools to surface insights• One solution for revenue planning with API connection to CRM and other sales and marketing systems
 OpEx planning	<ul style="list-style-type: none">• SG&A and COGS planning and forecasting toolkit accounting for linked revenue with an ability to include adjustments and allocate expenses on individual line items• One solution for OpEx planning with connection to other systems used in BU/BFs through API
 Long-range planning	<ul style="list-style-type: none">• LRP toolkit to build strategic plans; track performance with full P&L, BS, and CF impact; and drill down to see changes and drivers• Full data integration with other use cases deployed on Anaplan

PwC South East Asia Consulting contacts

Veronica Bartolome Managing Principal PwC Consulting Philippines veronica.r.bartolome@pwc.com	Yandi Irawan Finance Transformation Leader PwC Indonesia yandi.irawan@pwc.com	Ray Iswara Finance Transformation Director PwC Indonesia ray.iswara@pwc.com
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