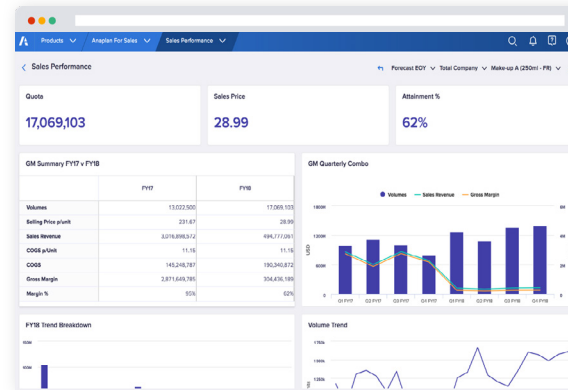


## Retail Bank Omnichannel Planning

### Banking

Anaplan's Retail Bank Omnichannel planning solution provides a comprehensive set of functionalities to operationalise retail banks' digital transformations, plan for the future of the branch network and workforce and model out branch repurposing scenarios across all channels to measure impacts on customers, employees, revenues and costs.

The solution addresses a large set of use cases: retail branch planning and repurposing, channel optimisation, contact centre planning and workforce planning.



### There's a better way to plan

Leverage the combined power of technology and people to make the most of the natural connections that exist within your organisation.

Connected Planning helps sales leaders use the best available data to make better-informed decisions.

**Dynamic:** Change plans at the speed of the customer.

**Collaborative:** Get the right people involved in decision-making.

**Intelligent:** Leverage internal and external data to unlock predictive insights.

### Key benefits

- The solution enhances transparency on branch-level profitability and costs and helps improve cost-to-income ratios
- It drives higher NPS and improved customer retention, increases sales conversion and customer satisfaction
- Finally, the solution informs retail banking leaders as to open, close or repurpose branches and optimise capacity to match customer demands across channels.

## Customer story



### UK Banking

Leading UK bank offering consumer, commercial and private banking services to 19 million customers.

Struggling to run intra-day, short and longer term contact centre forecasts, the bank needed statistical forecasting and scenario planning capabilities to better understand root causes of issues, mitigate risk and ensure continuity.

### Benefits

- Optimised scenario planning and analysis of historical events
- Improved forecasting speed and efficiency
- Optimised capacity by faster root-cause problem solving
- Improved webchat and secure messaging forecasts.

**“With Anaplan, we anticipate and proactively respond to market changes so we can look forward with confidence.”**

**Head of Workforce Optimisation**

## Key features and capabilities

### Retail branch planning & repurposing

- Strategic Modelling of the future of the branch network – openings, closures and repurposing – aligned with the Bank's location strategy
- P&L forecasting across the branch network
- Consolidation of branch P&L plans.

### Contact centre planning

- Contact centre resourcing and planning , based on branch strategy, network traffic and service level agreements
- Statistical forecasting to optimise supply and demand planning
- Planning at an intra-day level, SLA and NPS monitoring through skills and capacity rightsizing.

### Channel optimisation

- Aligning FTE capacity across distribution channels
- Forecasting of FTE and financial impacts of a transfer of branch channel resources to digital or contact centre channels.

### Workforce and talent planning

- Allocation of strategic workforce targets through the branch network
- Strategic initiatives published to branch managers, linking strategy with operational execution
- Planning for the future of the workforce and talent acquisition.

### Scenario modelling and analysis

- Profitability, workforce and contact centre impacts of branch openings, closures or repurposing
- Scenario modelling of FTE demand based on branch activity analysis
- What-if scenarios based on market or organisational changes
- FTE and financial impacts of the launch of a new product (for instance remote mortgages).

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## About Anaplan

Anaplan (NYSE: PLAN) is a transformative way to see, plan, and run your business. Using our proprietary Hyperblock™ technology, Anaplan lets you contextualize real-time performance, and forecast future outcomes for faster, confident decisions. Because connecting strategy and plans to collaborative execution across your organisation is required to move business FORWARD today. Based in San Francisco, we have 20 offices globally, 175 partners and more than 1,900 customers worldwide.

**To learn more, visit [Anaplan.com](https://anaplan.com)**

## Key features of the Anaplan platform

### Planning at scale

Enterprise-grade scale with a cloud native platform and patented in-memory Hyperblock engine.

### Voice to your data

One location for all of your planning data that is trusted, connected, and the latest.

### Runs your business

Unmatched flexibility to model any scenario for the business and by the business.

### A team sport

Engaging, collaborative, and actionable user experience.

### Safeguarding your present and future

Robust protection through: user access, identity management, and data encryption.

### Your competitive advantage

Embedded intelligence and optimisation to drive insights that matter.

## How Deloitte and Anaplan enable the connected enterprise for Retail Banking

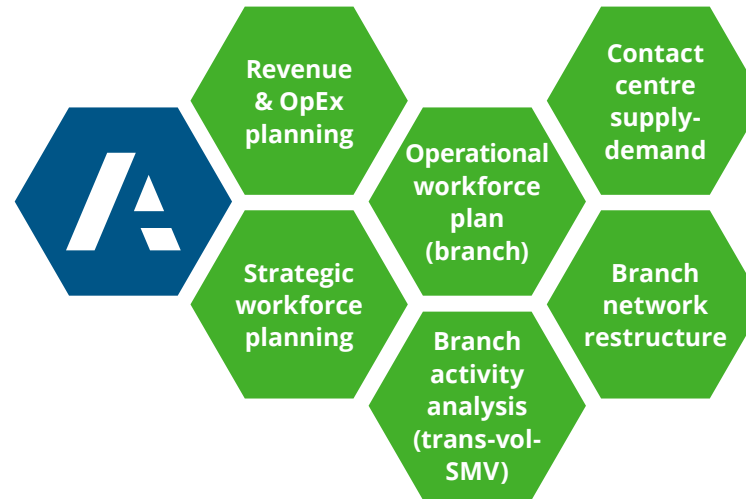
Deloitte and Anaplan have been working with global experts, customers, and partners to understand how the retail banking sector has been impacted by global economic climate change, and how organisations are navigating their way through adapted planning processes to support business resiliency.

### Our Mission

We're here to successfully implement our industry-leading solutions that leverage Anaplan, enabling our clients to make more informed decisions, drive revenue, and accelerate profitability.

Deloitte's Retail Banking Omnichannel solution powered by Anaplan will help you unleash the power of connected planning increasing your visibility across your organisation, connect siloed data, and take your real-time planning and forecasting to an entirely new level.

This distribution model connects all aspects of our bank from HR, Sales & Marketing, Finance/Operation through to Services allowing the ability to monitor your transformation, run what-if scenarios and assess on the performance of the distribution models.



### Top five signature issues Anaplan and Deloitte address for Retail Banking



#### Operating efficiencies:

Connect operational drivers with business and financial outcomes, to increase overall productivity and profitability across branch, customer, and product portfolios



#### Data transparency and automation:

Integrate data across technology ecosystem and automate manual production activities, moving away from disconnected spreadsheets and improving data quality



#### Speed to market:

Develop a robust top-down strategy approach, assessing the feasibility and potential of new product launches to increase the likelihood of success



#### Macro business planning:

Utilise analytics to understand impact of consumer behaviour and market trends to enhance product offerings, marketing campaigns and maximise revenue growth to align with commercial and strategic targets



#### Faster decision making:

Deliver real-time reporting and scenario analysis capabilities enables the business to evaluate various options and make key decisions more efficiently

## Get ready to unlock the exponential value of connected planning in your Retail Banking with Deloitte and Anaplan.

For the **eight year in a row**, Deloitte was awarded **Anaplan's Global Partner of the Year** award in recognition of our contribution to helping our joint clients use connected planning to drive profitable revenue growth, improve operational efficiency, and generate new insights into improving enterprise value.

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