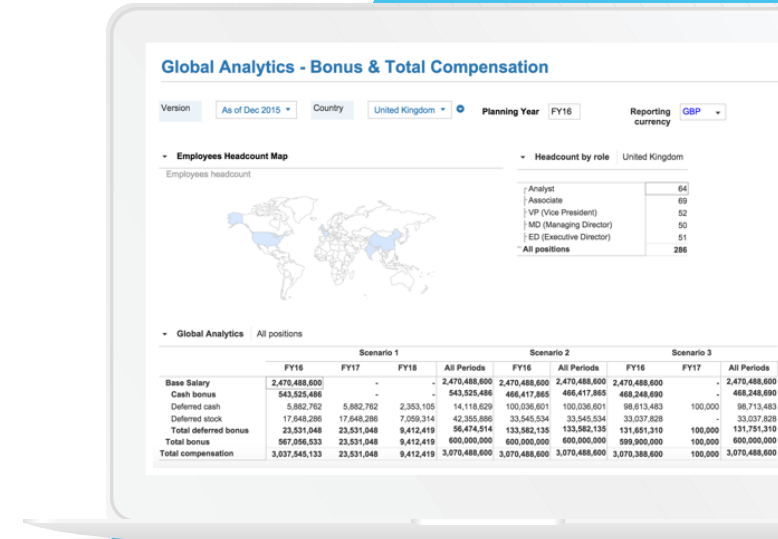




# Global Compensation for Banking

In today's investment banking world, regulators require increased transparency surrounding compensation rules. Deteriorating cost-income ratios are driving cost-cutting initiatives on compensation. At the same time, attracting, retaining, and rewarding talented professionals is a key success factor. To overcome these challenges, investment banks need more flexible compensation planning technology. Anaplan Global Compensation for Banking provides large banks with a scalable and agile planning and modeling platform, allowing reward teams to model and optimize bonus pools and deferral calculations across the entire organization, as well as benchmark employee performance, run "what-if scenarios," analyze results, and gain full transparency into the compensation model.



**Bonus pool allocation model** Top-down allocation of the group bonus pool by division, cost center, and employees. Driver-based calculations using prior-year data and suggested bonus at employee level and performance ranking.

**Bonus deferral modeling and calculation** Ability to define eligibility rules for long-term incentives and deferral calculations. Bonus deferral calculations based on bonus vehicles and vesting schedules. Full automation of calculations and auditability of the deferral process. Multi-year forecasts.

**Reporting, "what-if" analysis, and scenario planning** Global view of total compensation, including deferred bonus, with the ability to drill down by role, country, and other employee segments. Scenario planning for deferred bonus, total compensation, and variance analysis.

## KEY BENEFITS

- Significantly reduce lead time when processing compensation plans and bonus deferral calculations.
- Increase transparency and trust on data and calculations, streamlining regulatory audits.
- De-risk maintenance of the compensation model, considering the high volume of employee data changes in large banks.
- Empower reward teams with real-time scenario planning capabilities and help the Remuneration Committee make better-informed decisions.
- Improve monitoring of cost/income ratios by divisions, cost centers, and employees with performance benchmarking and scenario analysis.
- Gain agility with "what-if" scenarios, simulations, and collaboration across the HR department.
- Reporting and analysis of total compensation and bonus at any level of the entity structure and down to the employee level.
- Technology enabler to HR transformations in banking, in conjunction with Anaplan for Workforce Planning.
- Best-practice modeling of bonus allocations and bonus deferral calculations

## Key features

**Bonus allocations** Driver-based allocations of the total bonus pool by divisions, cost centers, and employees. Bonus amount suggested at the employee level, based on performance ranking, with the ability to override and input comments to justify final bonus amount and support regulatory audits.

**Eligibility rules for long-term incentives** Configuration of eligibility rules allowing to define the percentage of bonus to be deferred for groups of employees, based on selected criteria and order of priorities for the rules. Cost center managers can review the rules that apply to all their direct reports in a summarized dashboard.

**Bonus deferral calculations** Configuration of bonus deferral rules and groupings of employees for each of the deferral rules. Allocation of the deferred bonus amount into a percentage of cash and a percentage of stock and application of a vesting schedule for each of these.

**Bonus reporting and analysis** Analysis of global compensation by countries, currencies, positions, genders, divisions, and cost centers. Ability to run multiple scenarios using data at all levels of the organization and analyze variance between the different scenarios.

**Scenario planning and “what-ifs”** Pre-configured scenario dimension in the global compensation model to allow easy creation of “what-if” scenarios on-the-fly; for example, simulating different eligibility rules and/or different bonus deferral rules for a given employee or category of employees. Compare two versions of data on-the-fly and calculate variance analysis.

**Versioning and audit** Unlimited versions and comparisons. Data changes automatically tracked. HR analysts and managers can use comment field to justify bonus calculations and streamline regulatory audits. All amounts calculated in the bonus deferral process are auditable.

**Currency translation** Real-time currency translation of compensation and bonus deferral amounts reported in the group, division, or cost-center level dashboards

**Process automation** Bonus amounts allocated down to the employee level and automatically loaded into the employee’s attribute dashboard, which is used for bonus deferral calculations.

**Data integration with other systems** Flexible options to match customer needs. Anaplan Connect, APIs, and ETL tool support: Informatica, MuleSoft, Dell, Boomi, or SnapLogic. Fast and easy import/export via spreadsheet.

**Integrated HR planning** Ability to re-use the compensation and deferral bonus amounts output of the Anaplan Global Compensation app in the Anaplan Workforce Planning app.



### About Anaplan

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).