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Integrating platforms to better orchestrate **business performance**

Companies have invested in technology, strategic initiatives, and business and operational models to make digital transformation purposeful and effective. However, recent economic conditions—combined with software innovation, globalization, and evolving business models—has accelerated the rate of change for every business. To adapt, organizations need an agile approach to planning that helps them **(1)** make quicker decisions, **(2)** actively manage multiple versions of plans in response to the changing market conditions, and **(3)** execute enterprise strategies. Companies can achieve this without replacing investments already made to date by integrating existing enterprise platforms with Anaplan.



In a recent Harvard Business Review survey, 81 percent of respondents said their plans typically require changes during execution. Still, only 31 percent think their company is extremely effective at analyzing performance and making necessary changes on an ongoing basis¹.

Anaplan's Connected Planning platform is an agile and secure cloud-based environment used to optimize planning and improve decision making across all lines of business and business activities, from strategic to operational levels. Using the Anaplan platform, an organization can connect to the data sources of existing enterprise platforms so executives can get a complete picture of their data across business units in real time to drive faster and more accurate decisions. This concept of complementary software platforms within enterprise organizations that can be extended with the Anaplan platform is known as the Anaplan+ ecosystem. By integrating with and enhancing enterprise platforms, Anaplan helps maximize efficiencies and optimize back-and-front-office operations, enabling a harmonious Connected Planning landscape. This enables companies to unlock more value from their transformations.

Deloitte is continuously developing solution accelerators to demonstrate how Anaplan can integrate with other enterprise platforms and enable business leaders to imagine where new value can be created and better orchestrate business performance. Within Deloitte's collection of accelerators, there are solutions for each business function, including AI/ML-enabled and industry-specific solutions.

"Not every use case will apply to an organization, and this is not the full picture of the art of the possible. Rather, I hope these accelerators spark the conversation about where an organization can envision improvements and enhancements,"

says Ed Majors, principal at Deloitte Consulting LLP.

What you can do with Anaplan+ ecosystem solutions:

Boost sales productivity and optimize sales incentive spend

Anaplan+ Salesforce (+ several leading sales performance management solutions)

Plan-to-Pay is an intrinsically linked set of activities that help translate business strategy into sales execution. Critical go-to-market decisions, such as focus areas for growth, customer segmentation, and coverage strategy, come to life through operational activities, including territory design, quota and territory management, aligned opportunity visibility, and incentive compensation management. With business conditions and markets continually changing, sales leaders need the ability to course correct mid-cycle to accommodate changing customer or employee dynamics, factor in performance, and adjust product/service focus.

To address this challenge, Deloitte developed an accelerator that integrates Anaplan's sales planning and predictive analytics capabilities with Salesforce's account and opportunity management, including the requisite data models and automated data integration capabilities. Furthermore, the solution integrates several incentive compensation management tools, including Anaplan, to drive sales execution through credit and compensation. This solution, known as DigitalMix for Plan-to-Pay, enables true end-to-end sales planning and performance management, delivering faster planning cycles with lower operational expenses and improvements to sales incentive return on investment (ROI). Our clients can effectively and strategically manage their sales strategies through to execution because **(1)** finance, sales strategy, territory and quota planners, and sales leaders can collaborate more seamlessly, **(2)** reps have more real-time visibility to correct opportunities, and **(3)** sales crediting integrates with critical upstream processes.

Customer case study:

Deloitte implemented the DigitalMix for Plan-to-Pay solution for a global software and IT company spinning off a large component of its business. The solution enabled the company to ingest hundreds of thousands of records from other business platforms to optimize resources and increase sales productivity in a rapidly changing environment. With redesigned processes and connected systems, the organization saw an increased capacity for collaboration across five business units and regions. Additionally, the company saw expanded capacity for real-time territory and quota management, drawing data from millions of variables to connect the right sales representatives with the right products, account, and quota to stay aligned with the go-to-market strategy.

Maximize the business value of technology spend

Anaplan+ ServiceNow

Traditionally, IT has functioned separately from a business's primary goals to ensure IT-related activities (e.g., creating user access, managing equipment, and troubleshooting) were completed. In today's digital environment, IT is often at the core of all goals and objectives. Organizations are turning to the discipline of Technology Business Management (TBM) to align their IT departments with overall business goals, enabling the organization to make more informed decisions and maximize the business value of IT spending.

Anaplan's financial planning capabilities can be combined with ServiceNow's TBM capabilities to create an end-to-end solution for IT organizations to plan, prioritize, and track work aligned to business objectives while optimizing spend. Anaplan's financial planning and modeling capabilities can enable top-down planning, alignment on strategic initiatives, and target setting. ServiceNow can then take that top-down plan and convert it into a portfolio of projects to be executed against the strategy. Through the ServiceNow platform, an organization has visibility into portfolio investments and business strategies. It can track progress in real time to see exactly how funds are spent and the value of the work being delivered. By tying its plan to execution, an organization can make adjustments regularly, optimizing and reallocating resources as priorities shift.

Customer case study:

A leading asset management company was looking to transform its technology function by moving to agile delivery, identifying the value created to the business, and efficiently allocating technology costs. Deloitte designed a joint technology business management solution that included an ecosystem of products including Anaplan, ServiceNow, and Jira to create a next-generation planning solution that allocated technology costs to the businesses based on agile projects and resources.





Achieve true closed-loop marketing

Anaplan+ Adobe

Modern marketing relies upon significant coordination across organizational functions, processes, and platforms—and the landscape for technology providers is significantly fragmented across process owners and systems. However, siloed data, disconnected processes and technology, and a lack of analytics capabilities can negatively impact marketing's ability to maximize marketing effectiveness, increase revenue, meet compliance standards, and optimize spend. In today's continually changing business environment, marketing teams need to use data-driven, dynamic planning to optimize budget allocation, improve spend visibility, manage performance, and track ROI against enterprise strategic imperatives.

To address this challenge, Deloitte developed an accelerator powered by Anaplan and Adobe that helps marketers drive growth, increase marketing agility, and reduce spend by seamlessly integrating marketing planning with campaign creation, orchestration, and execution. This accelerator, known as the Closed-Loop Marketing solution, provides one integrated solution for the planning, budgeting, orchestration, and analysis of marketing campaigns. Using Anaplan's platform, marketing can make strategic plans to optimize budget allocation, spend visibility, and performance while coordinating in real time across departments and functions. Once a marketing plan has been approved, the campaign is managed through Adobe Experience Cloud. With its integration with Adobe's real-time campaign management and execution capabilities, marketers can track live vs planned campaign assets. Teams can validate execution, evaluate performance, and adhere to spending constraints, empowering teams to adjust and adapt along the way.

The Closed-Loop Marketing accelerator delivers an integrated, single-source solution that enhances an organization's decision-making power for agile, true closed-loop marketing. Organizations that can drive truly connected marketing from planning to performance with seamlessly integrated processes, technologies, and analytics can achieve: 2X faster speed to market², up to 45 percent increase in revenue³, and 1.5 percent decrease in marketing spend⁴.

Customer case study:

Deloitte implemented the Closed-Loop Marketing solution for a global technology company with \$1 billion in annual marketing spending. The company was hampered by highly manual campaign planning and had limited visibility into performance data and campaign priorities. Siloed teams led to duplication of effort that, in turn, yielded marketing spend that was twice the industry standard. The solution enabled the company to streamline its processes, and as a result, the organization saw a consolidated, detailed view of the path from planning to spending to marketing ROI. Their digital assets became reused globally in the enterprise asset management system and cost savings were realized by consolidating legacy components and reduced agency fees. Ultimately, the organization could expedite campaign development, limit non-working spend through improved budget and spend visibility, and accelerate time-to-market, aligning investments in a faster, better planning process.



Improve financial forecasting with AI/ML

Anaplan+ Google Cloud

Traditional forecasting and scenario modeling are often highly manual efforts and prone to unintentional human bias. In today's changing business environment, an effective and informed financial forecasting capability that considers internal and external factors is essential so an organization can rapidly shift from analysis to action.

To address this challenge, Deloitte developed PrecisionView™, an advanced forecasting solution built on the Anaplan platform that leverages Deloitte's proprietary statistical models and Google Cloud's TensorFlow. The solution combines data aggregation technologies with predictive analytics, cognitive, and machine-learning capabilities to leverage structured and unstructured open-source data (e.g., newsfeeds, financial markets, syndicated/subscription data, and social media) to improve financial forecast accuracy and efficiency. Using PrecisionView, an organization can identify and select critical external and internal inputs to drive scenarios and modeling, develop and manage the scenario definitions, and reforecast financials as new information is made available. They can then view the outputs and determine the best path forward or, in the event of adverse predictions, take corrective action to avoid an unfavorable forecast. As a result, organizations have a competitive advantage which enables them to respond faster to market opportunities and challenges than their competitors, provide better guidance to investors, forecast based on consumer trends, and improve investment scenario analysis. Lastly, they can reallocate the employees initially tasked with manually creating forecasts to do more critical tasks, such as gathering additional source data to improve the forecasts' quality or analyzing results.

"Humans can struggle to appropriately incorporate or calculate the importance of the right factors in forecasting and planning. By integrating AI/ML with Anaplan and Google Cloud, we're finding new ways to drive competitive advantage, accelerate the process, and create next-generation planning and scenario modeling experiences for our finance customers,"

says Eric Merrill, managing director at Deloitte Consulting LLP.

The integration of Anaplan and Google Cloud brings together advanced predictive analytics with an intuitive user experience and powerful scenario modeling capabilities to improve business and investment decision making.

Customer case study:

Deloitte conducted a key driver analysis and implemented the PrecisionView solution for a large consumer products company to transform their financial forecasting process using predictive analytics. Before engaging Deloitte, the company had unstructured reporting routines, a lack of insight into key business drivers, and varying forecast accuracy across financials. The PrecisionView solution enabled scenario modeling with insight into driver and forecast assumptions, improving forecast accuracy for profit and loss (P&L) across the company with 99.8 percent accuracy for full-year unit sales. The solution also established a defined forecast process and decreased forecasting run time to a week in length. This enabled executives to make better and quicker decisions and enhance future performance.

Improve supply planning and procurement

Anaplan+ Coupa

Organizations that rely on global supply chains face high levels of disruption. Yet, a recent Gartner survey shows that only 21 percent of supply chain organizations believe they have a highly agile and responsive network today⁵. In today's constantly changing market, an organization should increase resilience and optimize their supply chain management using market intelligence and analysis to anticipate disruptions as the "new normal" is defined.

An organization can combine Anaplan's supply chain planning capabilities with Coupa's procurement management capabilities to address this challenge. For example, an organization can leverage Anaplan to combine enterprise-wide data with internal and external business conditions to assess the impact of customer demands or shifting supply chain conditions. Using inventory analytics and "what-if" scenarios in Anaplan, an organization can determine optimal inventory levels to meet business objectives. Once inventory levels are defined, Coupa can be integrated with Anaplan to streamline and automate the procure-to-pay business flow that encompasses requisitions, approvals, purchasing, receiving, and e-invoicing. In addition to standardizing processes, the Coupa platform provides real-time insights into open purchase orders, which can be fed back into Anaplan to improve end-to-end supply chain visibility and future scenario planning.

The integration of Anaplan and Coupa can be used to create structure and consistency in supply planning and procurement management, enabling organizations to achieve full visibility of processes and remain nimble in the face of supply chain disruption.

The bottom line

Organizations need an approach to planning that helps the enterprise make better, quicker decisions, actively manage plans in response to changing realities, and execute goals. By integrating with and enhancing other enterprise platforms, Anaplan helps maximize efficiencies and optimize back-and-front-office operations, enabling a truly Connected Planning landscape.

"We've built Anaplan+ accelerators that take a "best in cloud" approach to address complex business processes. These accelerators embed our functional and sector-specific experience to catalyze "art of the possible" conversation and jumpstart technology implementation with reduced time, risk, and cost to organizations,"

says Simmi Mehta, principal at Deloitte Consulting LLP.



The Anaplan+ ecosystem at a glance

Anaplan+ Salesforce/ DigitalMix for Plan-to-Pay:

End-to-end sales planning and performance management to deliver faster planning cycles with lower operational expenses and sales costs while supporting revenue growth.

Anaplan+ GoogleCloud/ PrecisionView:

Analytics and modeling to enhance forecasting, resource allocation, and response to market opportunities and challenges.

Anaplan+ ServiceNow:

Consolidated planning connected with workflows to maximize the business value of technology spend.

Anaplan+ Coupa:

Consolidated supply planning and procurement management to optimize the management and agility of a supply chain.

Anaplan+ Adobe/ Closed-Loop Marketing:

Consolidated planning and spending to expedite campaign development, accelerate time-to-market, and improve marketing ROI.

Get in touch to learn more about how Deloitte's Anaplan+ ecosystem of solutions can help enhance your organization. For more information about Deloitte and Anaplan visit: <https://www2.deloitte.com/us/anaplan>

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¹ Source: <https://hbr.org/resources/pdfs/comm/anaplan/HBRASAnaplan12.7.16.pdf>

² Source: Anaplan for Marketing benchmark

³ Source: Adobe Experience Cloud case study

⁴ Deloitte industry experience

⁵ Source: <https://emtemp.gcom.cloud/ngw/globalassets/en/supply-chain/documents/trends/weathering-the-storm-supply-chain-resilience-in-an-age-of-disruption.pdf>

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