

Financial Planning and Consolidation

Unify your financial planning and consolidation



Ready to break down the siloes between actuals and plans? Many finance teams struggle with disconnected consolidation and planning processes, leading to delayed cycles, inconsistent reporting, and misalignment between actuals, forecasts, and plans.

Without connecting these critical processes, data discrepancies, compliance risks, and inefficiencies pile up. It's time for a smarter, end-to-end solution that finance can own and maintain themselves — one that supports your unique business needs instead of limiting them.

There's a better way to plan, record, and report

Connect your consolidation and planning processes. Only Anaplan delivers purpose-built applications for both financial planning and consolidation delivered via seamless UX/UI for a unified user experience. Our financial planning and consolidation solutions deliver real-time alignment, improved accuracy, and greater agility so you can pivot under pressure and ensure financial performance excellence in an ever-evolving business environment.

Key benefits

Boost agility: Instantly assess the impact of changes on consolidated results with dynamic scenario planning. Finance teams can fully own and manage their models, unlike other solutions that require IT or third-party support.

Improve accuracy and real-time alignment: Ensure forecasts and budgets reflect the latest consolidated actuals for more informed decision-making. Our customers have reported up to a 20% improvement in forecast accuracy.

Minimize risk and increase transparency: Maintain a single source of truth to reduce reconciliation errors and enable a full audit trail.

Increase finance team efficiency by up to 40%: Free your finance teams from manual tasks so they can focus on strategic insights that optimize decision-making and drive growth.

Cut consolidation and reporting time by up to 90%: Eliminate manual, error-prone work and increase automation and accuracy across the consolidation and reporting process.

Accelerate time to value: Get best practices, calculations, and templates out-of-the-box that are backed by Anaplan's unparalleled, scalable platform, embedded with a common data model and purpose-built services, to deliver value fast.

Turn insights into action with AI: Use explainable AI-driven finance applications to analyze data faster, build trust in results, and connect insights into every decision.

Top finance leaders plan with Anaplan



Solution details

End-to-end financial management

- Drive financial performance excellence with purpose-built solutions for both financial planning and consolidation
- Empower finance to move faster with low-code/no-code model setup, maintenance, and updates — no IT required
- Increase enterprise-wide collaboration via seamless UX/UI for a unified user experience
- Streamline data workflows with enterprise-ready, native data integration, transformation, and management using Anaplan Data

Orchestrator (ADO)



Financial Consolidation

- Integrate new acquisitions, see account-level currency translation adjustments, generate instant cash flow statements, and more – all within the comfort of your preferred web browser
- True cloud, multi-tenant solution with a single tenant data repository
- Deliver precise financial and narrative reports with real-time data integration using our integrated Microsoft Office narrative reporting capabilities and disclosure management capabilities to empower informed decisions and stakeholder confidence
- Connect with ERPs, general ledgers, and financial and operational systems across subsidiaries and regions, regardless of chart of accounts or fiscal years, mapping them to your corporate standard

Integrated Financial Planning

- Model quickly at scale, with planning unlimited scalability and flexibility
- Gain a single source of truth for financial planning across the income statement, balance sheet, and cash flow statement for complete visibility into your projected financial condition
- Provide transparency into revenue, operating expense, headcount expense, capital planning, and long-range planning
- Streamline and automate your planning process for seamless access to actuals and detailed insights
- Leverage our Anaplan Finance Analyst — your always-on AI agent for smarter planning — to drive decision-making and financial health monitoring

The Anaplan platform offers

- **"What if" scenario and multi-dimensional modeling**, powered by our purpose-built services, producing ultra-fast calculations at unprecedented scale.
- **True out-of-the box calculations, logic, and rules that do not require any customer coding or bespoke application scripting** to handle the complexity of your consolidation and reporting process.
- **Built-in dashboards, reporting, and analytics** with data visualization providing a comprehensive and real-time view on financial position, at every level.
- **Collaborative and agile planning, consolidation, and reporting** across the enterprise. Workflow and prebuilt task types make it easy to automate everything from data loads and mappings to MS Teams or Slack notifications.
- **Best-in-class security and compliance** with role-based application and data access control, user management, and SSO support with SAML 2.0 compliance, and data encryption.
- **A highly extensible ecosystem** — collect and analyze data in a single location using APIs, ETL connectors, and built-in integrations with other solutions.

*Some information in this document may have product roadmap that is intended to outline our general product direction and is provided for informational purposes only.

About Anaplan

Anaplan is the only scenario planning and analysis platform designed to optimize decision-making in today's complex business environment so that enterprises can outpace their competition and the market. By building connections and collaboration across organizational silos, our platform intelligently surfaces key insights — so businesses can make the right decisions, right now.

More than 2,500 of the world's best brands continually optimize their decision-making by planning with Anaplan.

To learn more, visit www.anaplan.com

