Anaplan for Clinical Trials Forecasting and Portfolio Planning

Unify finance, operations, and R&D to maximize efficiency and ROI in life sciences

Anaplan

Clinical trials are the lifeblood of pharmaceutical innovation, yet they're increasingly complex and costly to manage. Globalized research, decentralized sites, and fragmented data make it hard to track patients and costs across hundreds of studies, often leading to inaccurate forecasts, limited visibility, and budget overruns.

Spreadsheets and manual consolidation can't keep pace, creating a disconnect between clinical planning and financial realities. Traditional planning tools compound the problem, failing to capture the interplay between milestones, enrollment, and financial performance, resulting in fragmented insight that delays decisions and inflates costs.

Anaplan replaces this fragmentation with a single platform for clinical trial planning. By bringing finance, R&D, and operations together, you gain a view of your portfolio — from patient enrollment and site costs to clinical supply inventory — enabling scenario modeling and decisions that keep studies on track and budgets under control.

There's a better way to plan

Anaplan delivers real-time visibility into every trial decision — from enrollment to accruals to executive reporting. With AI-driven analytics and scenario modeling, life sciences organizations can test assumptions, evaluate multiple funding and timeline scenarios, and act with confidence. The result is greater forecast accuracy, shorter cycle times, and improved ROI across the clinical portfolio.

Key benefits

- Improve forecast accuracy for study costs and enrollment across sites, cohorts, and geographies
- Create a single source of truth by connecting financial, operational, and patient-level data
- Automate accruals, PO tracking, and cost allocations to improve accuracy and audit readiness

- Model complex scenarios in minutes to support confident go/no-go and portfolio decisions
- Enable collaboration across finance, R&D, and clinical operations, including CRO-led studies
- Accelerate insights and decisions with AI-driven forecasting, anomaly detection, and guidance

Solution details

Study forecasting

Align budgets and timelines with bottom-up forecasts tied to enrollment, site activation, and costs.

- Forecast expenses and timelines by site, phase, or program with greater precision
- Model linear, milestone-, or driver-based approaches
- Use AI variance insights to detect and resolve forecast-actual gaps early
- Improve CRO oversight by linking operational and financial signals to internal plans

Patient enrollment forecasting

Forecast enrollment accurately by modeling ramp patterns and downstream impacts.

- Model ramp-up/down dynamics to project enrollment more precisely
- Blend milestone and driver inputs for accurate patient-flow forecasts

- Instantly see how shifts affect staffing, logistics, and budgets
- Use predictive AI to flag delays, surface risks, and evaluate alternatives

Expense and accrual management

Gain full financial control by automating accruals and unifying expense data.

- Integrate ERP, EDC, and other sources for a single financial view
- Automate accruals and PO tracking to cut manual work and improve accuracy
- Gain real-time cost visibility to forecast liabilities confidently
- Use anomaly detection to spot variances and flag CRO or site discrepancies

Portfolio analysis and reporting

Drive smarter decisions with a consolidated, real-time clinical view.

- Unify operational and financial data for portfolio-level visibility
- Monitor KPIs with automated, self-service reporting
- Accelerate decisions with timely, trusted insights
- Leverage AI to quickly summarize drivers, trends, and risks

Scenario planning and versioning

Build agility by modeling any future state of your trials.

- Model timelines, budgets, and enrollment assumptions to test possibilities
- Compare scenarios side-by-side to weigh trade-offs
- Adjust plans quickly as conditions evolve
- Generate AI-driven scenarios to assess disruptions and guide contingencies

The Anaplan platform offers

- **"What if" scenario and multi-dimensional modeling** that's powered by our next generation Polaris calculation engine, with AI at the core, producing ultra-fast calculations at unprecedented scale so you can anticipate market changes.

- **Built-in dashboards, reporting, and analytics** with data visualization providing a single source of truth on business performance.

- **Collaborative and agile planning, consolidation, and reporting** across finance, clinical operations, supply chain, and R&D teams.

- **Best-in-class security and compliance** with role-based access control, user management, 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.

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

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