

# Narrative financial reporting

Tell the story behind your numbers with confidence and speed

Anaplan

Frustrated with the manual, repetitive, time-consuming financial reporting process? Periodic, recurring multi-author reports all share the same pain — multiple versions, disconnected data, time to roll-forward, and too much time spent on low-value work like data collection and validation, better known as copy/paste, find/replace and then tick-and-tie back to sources.

Creating narrative reports — whether they're annual reports, earnings reports, investor presentations, board packs, or management reports — shouldn't require chasing numbers or scrambling to reconcile last-minute changes. There's a better way to create and deliver trusted narrative financial reports.

## Key benefits

- **Create accurate, audit-ready reports in a fraction of the time.** Automatically pull real-time data using a single interface — no exports, no stale numbers, or last-minute surprises.
- **Bring your numbers to life.** Combine charts, KPIs, and narrative in one collaborative platform. Link data directly to narratives to enhance stakeholder understanding and fuel more strategic decision-making.
- **Boost collaboration.** Allow multiple contributors to work on the same document concurrently across teams, functions, and regions. Co-author

and approve reports collaboratively to streamline workflows and increase alignment.

- **Automate reporting roll-forward**, including data sources and workflow assignments. Versioning is automatic, comparable, and can be user-restored with full auditability.
- **Finance-owned and easy to adopt.** Author in Microsoft Office for instant adoption, no training, scripting, or IT reliance. Rapid deployment with built-in connectors, intuitive user data experience, and inverted design report creation.

## There's a better way to record and report

Modernize your narrative reporting with Anaplan. Minimize the risk of errors, risks, and inefficiencies, from annual reports to filings. Connect data across your business and dynamically link it to text, charts, and other visuals in Word, Excel and PowerPoint so your reports are always accurate and up to date. Enable real-time collaboration, automatic and comparable version history, audit readiness, all of which empower your teams to confidently tell the story behind the numbers.



We were considering a solution that would have cost a significant amount and taken months to implement. Between its out-of-the-box functionality, Office integration, and how our finance team can manage the entire reporting process, we quickly realized how much more we'd benefit from the Anaplan Disclosure Management application."

CFO,  
Crypto products and services provider



## Solution details

Our narrative reporting application produces enterprise-ready, audit-ready reports and enables users to:

- Create financial documents — including annual reports, earnings reports, investor presentations, board packs, management reports, and more — using Microsoft's Office productivity suite
- Integrate data from multiple sources — ERP, finance and operational systems, and more — into the same document(s) to eliminate manual uploads and stale data
- Perform automated, un-attended synchronization of documents with data coming from external sources so your narratives, tables, and charts always reflect live data
- Automate workflow and notifications from creation to approval and distribution to streamline reporting
- Easily track changes with system managed version histories
- Enable dynamic text, data, and table updates as well as roll-forward functionality to eliminate copy-paste errors
- Data flows to any number of documents, ensuring that any data point that is shared will be updated in every report it is tied to
- Manage user permissions, report visibility and assignments, audit trails, and version histories to ensure secure collaboration and transparency

To learn more, please visit:

<https://www.anaplan.com/solutions/disclosure-management/>

## The Anaplan platform offers

- True out-of-the box calculations, logic, and rules that go beyond templates and starter kits to handle the complexity of your reporting process.
- Built-in dashboards, reporting, and analytics with data visualization providing a comprehensive view on financial position.
- Collaborative and agile consolidation and reporting across the enterprise. Workflow and prebuilt task types make it easy to automate everything from data loads to Teams notifications.
- Best-in-class security and compliance with role-based 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.

## 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](http://www.anaplan.com)

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