

Anaplan Workflow

Automate enterprise planning with intelligent workflows



Enterprise planning involves recurring activities that span multiple stakeholders and functions. These processes are often managed manually, requiring planners to chase updates, send reminders, and repeatedly trigger data imports.

This approach is time-consuming, error-prone, and costly. The result is plans that arrive late, lack accuracy, and fail to provide the timely insights needed to drive productivity.

Anaplan Workflow enables you to automate, manage, and monitor planning processes — driving faster, more confident business decisions.

Workflow integrates seamlessly with the Anaplan platform, automating complex planning processes with timely data from across regions, teams, and cost centers. It uses real-time notifications, calls-to-action, and auditable approvals to ensure stakeholders are involved exactly when needed. This also drives ownership of planning tasks at every level while enabling central functions like finance or operations to maintain visibility and ensure alignment.

Key benefits

- **Simplify business planning for every user:** Structure complex processes like budget forecasting or territory planning into clear, actionable steps with instant notifications.
- **Track and monitor progress with visual reports:** Visual, flow chart style reports for admin users make it easy to track progress, identify bottlenecks and take relevant action.
- **Make planning repeatable, automatic and templated:** Workflow templates make definition, editing and duplication of business processes quick and easy.
- **Turn process ideas into action with AI-powered workflow creation*:** AI features in Workflow can interpret business process context from documents, slides, or whiteboard images — automatically generating suggested workflows. Move from idea to automation without writing code.
- **Leverage low-effort setup for speed and scale:** Native integration within the Anaplan platform helps scale adoption, reduce build time, and minimize reliance on technical teams.

*roadmap item

CUSTOMER STORY



LinkedIn is a world renowned professional social networking platform where individuals and companies create profiles to showcase their career experience or services, connect with other professionals, find jobs or employees, and engage in industry-related discussions.

Challenges:

- Splitting up territory plans by hand meant hours wasted every month on manual work
- Version control issues in territory planning process with online spreadsheets
- Collaboration issues and approval delays with sales reps and managers respectively

Results:

- 2x more frequent sales planning improves business agility
- 75%+ faster territory planning puts sellers to work sooner
- 7,500 hours saved in GTM operations (FY23) creates bandwidth to support sellers



Anaplan has greatly reduced the frustration and anxiety that used to come with a lot of our planning processes."

Rachel Krall
Senior Director, Go-To-Market Operations, LinkedIn

Capabilities

Seamless integration within Anaplan platform

- Workflow is embedded in the Anaplan platform with no extra integration tools required.
- Leverage existing data, dashboards, and reports already in your Anaplan environment.
- Ensure consistency by keeping all planning in one environment.

Low barrier to usage, driving increased engagement

- Boost participation with automated, personalized notifications and Slack integration.
- Lower technical hurdles so broader user communities can easily join planning cycles.
- Encourage timely completion of tasks and approvals, keeping teams aligned and synchronized.

Repeatable, reliable process templates

- Use reusable templates to quickly define, edit, and duplicate business processes.
- Apply predefined administrative roles and access levels to control who can create, edit, or run workflows.
- Standardize processes across teams for consistency and efficiency.

Auto-triggered workflows for faster planning

- Automatically trigger planning processes based on predefined data changes, thresholds, or events.

- Eliminate manual intervention to reduce administrative overhead and accelerate planning cycles.
- Ensure timely execution of critical tasks so decisions stay aligned with up-to-date business conditions.

Personalized and clear calls-to-action

- Guide users with personalized tasks and clear calls-to-action.
- Deliver timely prompts based on live data, helping stakeholders address issues before they become bottlenecks.
- Keep planning processes adaptive and responsive by ensuring actions align with dynamic business changes.

Visual reports and trackable task execution

- Use intuitive, flow chart-style reports to track progress, spot bottlenecks, and take corrective action.
- Capture comprehensive activity and timestamp data to enable future audit reporting capabilities.
- Monitor task execution in real time, ensuring accountability and smoother handoffs across teams.

Scalable workflows that adapt to growing data and users

- Scale seamlessly as datasets, teams, and organizational complexity increase.

- Tailor workflows to meet varied business needs and compliance requirements.
- Maintain performance and reliability, even with higher volumes of data and users.

Workflow Advanced for additional flexibility and AI support

- Enable sophisticated processes with branching, parallel task flows, and automated decisions.
- Trigger workflows with AI-driven insights to adapt dynamically to changing business needs*.
- Accelerate multi-stakeholder planning across complex workflows with enhanced flexibility.



Anaplan Workflow is the smart way to automate your planning processes. It offers:

- **Integration & Automation** - Seamless integration across Anaplan and connected enterprise platforms, enabling process automation end-to-end.
- **Scale** - High volume capacity, branching processes, and parallel approvals — vital for large, multi-team organizations.
- **Flexibility** - Real time adaptation for business needs, thresholds, and exceptions instead of being locked into a single route.
- **Usability** - Intuitive drag-and-drop design tools and customizable templates make process setup simple for admins and business users alike.
- **Collaboration** - Features such as @ mentions, comment summaries, and Slack integrations facilitate real-time teamwork.
- **Enhanced data quality** - Standardized approvals and context labels reduce errors, while detailed auditability ensures compliance and reliability
- **Intelligence** - AI-powered features suggest, optimize, and accelerate workflow setup — no code or deep admin expertise required*.

*roadmap item



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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