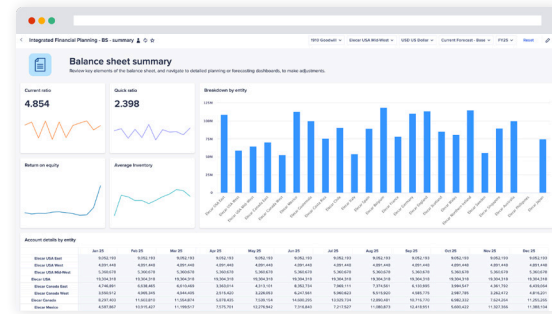


# Integrated Financial Planning application with Anaplan Finance Analyst

Next-gen financial planning with AI-driven insights is here



Struggling to navigate today's turbulent business landscape? You are not alone. Many finance leaders are held back by slow decision-making caused by outdated and fragmented systems and data silos. Many finance teams spend tremendous amounts of time on manual, error-prone processes and lack real-time data and insights, limiting valuable collaboration and partnership with business to identify key issues, make financial decisions, and seize opportunities. You may also be using financial tools that heavily rely on IT involvement, restricting your ability to perform your activities quickly. Say good-bye to old systems and slow processes — elevate finance to support informed decision-making with speed, agility and confidence.



## There's a better, faster way to plan

Anaplan is transforming and elevating FP&A processes with our purpose-built Integrated Financial Planning (IFP) application. Providing a secure, AI-driven, and real-time overview of your enterprise financial performance, IFP enhances decision-making and supports delivery of stronger outcomes. Anaplan's ready-to-deploy IFP application offers industry-leading best practices, enriched with supporting dashboards and reporting — built on the world's most agile planning platform. Quickly deploy the application with guided set-ups of core finance use cases and out-of-the-box models that easily extend to support your unique requirements.

Anaplan Finance Analyst, our always-on, intelligent role-based agent powered by generative and agentic AI, is directly embedded into the IFP application, enabling you to analyze your finance planning data instantly for faster, more informed decision-making. Anaplan Finance Analyst simplifies complex financial queries, uncovers trusted insights, and forecasts market trends through intuitive, natural language interactions. Leverage the power of our conversational AI assistant to elevate your role as a finance leader and fuel your organization toward greater success.

## Key benefits

**Rapid time to value:** Easily deploy and maintain without coding, get best planning practices out-of-the-box — reducing planning cycle times and improving collaboration and efficiency.

**Unified financial view:** Achieve a single version of truth for planning across all financial statements and identifying growth drivers.

**Streamlined data integration:** Leverage the Anaplan Data Orchestrator for high-performance, native integration with ERPs and other Anaplan applications, creating a reliable and truly connected planning ecosystem.

**Uncover hidden insights:** Anaplan Finance Analyst swiftly analyzes vast amounts of your financial data and provides valuable insights and actionable steps to enhance your forecasts and decisions using natural language queries. Easily visualize your data to tell your story with clarity and impact.

**Scenario planning:** Use powerful scenario modeling and what-if analysis to evaluate best steps forward, optimizing resources.

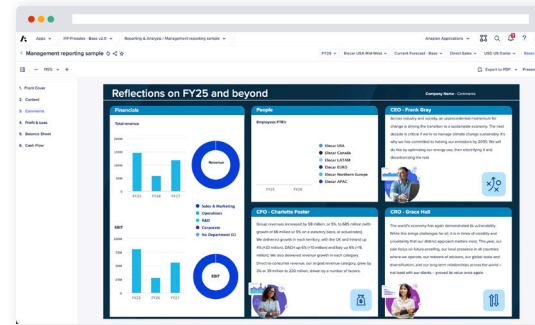
**Flexibility at the core:** Leverage pre-built planning models or create customized models to meet unique business needs and scale with your business growth.

**Ease of deployment:** Streamline your application deployment and maintenance by leveraging a framework that simplifies initial setup and provides the flexibility to seamlessly adopt the latest features.

## Key features

The Anaplan Integrated Financial Planning application allows you to:

- Integrate ERP/GL data with Anaplan Data Orchestrator leveraging **native integration with ERPs** to simplify, streamline, and connect operational and financial data
- Quickly set up using the Anaplan Application Framework and implement best practice-based FP&A processes including models, calculations, dashboards and reports, **reducing implementation risk** and fostering faster user adoption.
- Easily **extend the application** by building custom planning models tailored to your specific requirements to foster user adoption and organizational value
- Make faster, more informed decisions using **built-in driver-based** planning, scenario modeling, and what-if analysis.
- Gain full visibility into your financial health with a detailed **balance sheet and cash flow** plan for real-time monitoring and decision-making
- Leverage **job-based planning** and native integration with Operational Workforce Planning application and other Anaplan applications for a unified process



- Access embedded **generative and agentic AI**<sup>1</sup> trained on the most frequently asked financial questions, allowing conversational queries for real-time, deep insights and in-depth analysis of your financial data
- Ensure **interoperability** to enable enterprise connectedness with other functions through rule consistency and standardization across our applications
- **Out-of-the-box deployment and integration** with our modern, purpose-built Anaplan Financial Consolidation application to quickly connect actuals to plans and drive greater forecasting accuracy
- Leverage our Anaplan XL Reporting<sup>2</sup> solution, a powerful **Excel plug-in** for enhanced reporting, ad-hoc analysis and fast user adoption
- Gain access to all **future versions** of the IFP application as it gets upgraded for new functionality, enhanced capabilities, and latest innovation

<sup>1</sup> For more information on Anaplan Finance Analyst, [go here](#).

<sup>2</sup> For more information on Anaplan XL Reporting, [go here](#).

## CUSTOMER STORY



EUROPEAN NEXT-GENERATION  
NUCLEAR PLANT

### Transform enterprise financial planning

Next-generation nuclear plant providing stable, low-carbon power to 6M+ UK homes.

#### The company sought to:

- Overcoming disconnected top-down and bottom-up planning
- Eliminating manual, time-consuming, and error-prone processes
- Establishing financial control as a new, standalone company
- Ensuring workforce capacity for decade-long project

#### With Anaplan's Integrated Financial Planning application, the company was able to:

- Accelerate time to value and deploy a fully functional system faster and more cost-effectively leveraging a comprehensive finance solution
- Improved decision quality by replacing outdated spreadsheets with reliable, real-time data from a single source of truth
- Realize significant cost and time savings by automating manual data task, freeing the team for more strategic analysis
- Enabled strategic collaboration between finance and HR on one platform, shifting focus from reconciling data to planning

## The Anaplan platform offers:

- **Rapidly deployable applications** with best practices that are configurable to customer requirements, upgradeable with availability of future release, and extensible to other use cases through standard Anaplan platform capabilities.
- **AI embedded within Anaplan** that is ready to deliver accurate answers, surface insights, and drive tailored actions for finance, sales, supply chain, and workforce planning.
- **“What-if” scenario and multi-dimensional modeling** powered by our high-performance calculation engine, producing ultra-fast calculations at unprecedented scale.
- **Dashboards, reports, and analytics** with data visualization provide a single source of planning truth on business and workforce data and performance.
- **Collaborative and agile planning** across the enterprise from corporate to business units and across functions and operations (finance, sales and marketing, supply chain, and HR).
- **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 Anaplan Data Orchestrator using APIs, ETL connectors, and built-in integrations with HCM/HR, finance, operations, other systems of record, and data warehouses.

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

**Anaplan**

