

Anaplan Profitability Analysis application for asset management firms



Enhance decision-making with clear insights into costs, margins, and profit drivers



In financial services, fast decisions often carry high stakes when costs and returns aren't fully understood. Finance leaders face ongoing pressure to protect margins, yet traditional tools create blind spots. Cost allocations lack transparency, legacy models are rigid, and profitability insights are fragmented across products, clients, and channels. Processes take weeks to complete, scenario modeling is limited, and siloed teams make decisions in isolation. The result is misallocated capital, underperforming units being subsidized, low-margin clients receiving too much focus, and slow responses to market changes — all of which erode profitability.

There's a better way to plan

Anaplan simplifies profitability planning by bringing data, models, and teams together on one out-of-the-box application. With the Anaplan Profitability Analysis application, asset management firms gain real-time transparency into costs and returns, with flexible models that adjust as the business evolves. Profitability can be analyzed by product, client, or channel, while scenario modeling allows firms to test strategies before acting. By automating manual processes and connecting plans across functions, Anaplan helps asset management firms allocate capital with confidence, focus resources on the right opportunities, and react to market changes faster — turning profitability planning from a challenge into a competitive advantage.

Key benefits

- **Make faster, smarter decisions.** Real-time profitability insights, forward-looking scenario analysis, and granular allocations enable confident pricing, resourcing and strategic decisions.
- **Improve margins with clarity.** Identify inefficiencies, optimize pricing, and reduce cost-to-income ratios while tracing results through transparent, drillable allocations.
- **Turn performance into accountability.** Link incentives, behaviors, and outcomes directly to financial results with clear, auditable allocation rules.
- **Scale with flexibility and speed.** Easily configure models, adapt structures as business evolves, and leverage rapid calculations for immediate insights.
- **Trust your data and models.** Built-in validations, transparent rules, and intuitive analysis help identify upstream issues and replace black-box processes.
- **Rapid time to value** with out-of-the-box, domain-specific capabilities designed to address asset management firms' profitability challenges from day one.



Aberdeen unlocks £100M savings in 12 weeks

Aberdeen, a UK-based global investment and wealth management company, deployed the Anaplan Profitability Analysis application in just 12 weeks, replacing slow, Excel-heavy planning with real-time transparency that delivered over £100M in cost savings and £251M in profits.

Challenges

- Broken FP&A process with cumbersome, rigid, weeks-long planning cycles
- Excel-heavy workflows and manual models slowed agility and responsiveness
- Outdated planning system misaligned with evolving business structure
- Low transparency left stakeholders distrusting profitability outputs

Results with Anaplan:

- Rapid time-to-value with deployment in 12 weeks
- Cost savings and profit growth with £100M saved, £251M profit
- Real-time insights with scenarios run in minutes, not weeks
- Transparency and trust as stakeholders engage with outputs
- Agile planning with incremental use cases for fast response
- Cultural shift as finance moved from frustration to collaboration



Solution details

Maximize margins and pricing with confidence

- Gain full visibility into true profitability across every dimension of the business — product, channel, or client segment — with transparent, flexible allocation models
- Use profitability insights to set margin-backed pricing thresholds and simulate strategies that minimize risk and maximize business impact and market fit

Control costs and drive accurate revenue

- Reveal the true total cost of ownership (TCO) of internal operations, model interdependencies, and simulate strategic changes to uncover cost-saving opportunities
- Ensure accurate revenue recognition and compliance by automating complex, rules-based revenue allocation across entities or funds
- Support regulatory and internal reporting with transparent, auditable cost allocations that align with organizational accountability
- Enable fair and defensible cross-entity chargebacks with consistent, rules-driven transfer pricing aligned to global compliance standards

Reward performance and align outcomes

- Allocate bonus pools equitably using performance-based drivers and transparent methodologies that align with compensation policies

Invest smartly and act sustainably

- Distribute ESG and carbon-related costs across business units to reflect environmental impact and support sustainability reporting
- Attribute marketing costs across channels, regions, or segments to measure ROI and optimize future investment decisions
- Allocate capital against risk-weighted assets accurately to meet regulatory standards and support better risk-adjusted decision-making

Key capabilities

Models evolve with your business

- Configure rules and connections instantly, without the need for additional IT/development work
- Adapt models as your business changes

See clearly and act confidently

- Access clear insights with intuitive drilldowns
- Catch and correct issues early with built-in validations
- Allocate at the most detailed level of your business

Real-time decisions and strategic insights

- Get immediate answers with real-time calculations
- Plan ahead with scenario and profitability analysis

Seamless data integration

- Connect to upstream and downstream systems with ease
- Use prebuilt connectors or self-service import/export
- Integrate portfolio management systems and external market data for richer insights



The Anaplan platform offers

- **"What if" scenario and multi-dimensional modeling**, powered by our patented Hyperblock® calculation engine, 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 across Sales, Finance, HR, Marketing, and other business units.
- 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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