

Transforming enterprise planning for insurance

Navigate market changes, reduce risk, and drive long-term success



Reimagining planning for confident decision-making

In an era defined by relentless change, insurance firms must rethink how they plan to stay ahead. Volatile markets, evolving risk landscapes, regulatory shifts, and rising customer expectations create constant pressures. Navigating this complexity requires rapid responsiveness and strategic foresight — capabilities that traditional planning tools simply can't deliver.

A disconnect between strategy and execution delays progress and ultimately leads to profitability

risks, underpriced policies, and missed growth opportunities. Every strategic decision across finance, underwriting, claims, or distribution demands a fast, coordinated response. Yet siloed systems and outdated processes slow momentum and undermine confidence.

To outpace change, insurers need dynamic planning that connect teams, surface AI-driven insights, and enable instant, informed decisions. With Anaplan, disruption becomes a catalyst for adaptability, resilience, and long-term success.



Unlocking enterprise-wide agility and intelligence with Anaplan

Anaplan is the market-leading platform for scenario planning and analysis, transforming data into actionable insights for real-time, optimized decision-making. We foster agility across your enterprise, enabling faster, smarter decisions so you can:



Activate your business by seamlessly **integrating data and systems** to operate more efficiently.



Accelerate planning and execution with **Anaplan applications** to move faster and adapt to change.



Connect teams to **align planning processes** across the organization, eliminate silos, and improve coordination.



Optimize decision-making with **Anaplan Intelligence**, empowering teams with AI-driven insights.

Unlike traditional planning tools, Anaplan empowers organizations with dynamic modeling, real-time adjustments, and scenario testing, enabling flexible, enterprise-wide plans that adapt quickly to change. Our centralized planning environment provides a single source of truth to ensure collaboration and greater efficiency.

With Anaplan, you gain speed, adaptability, precision, and turn planning into a competitive advantage across every business function.

FINANCE

Gain clarity and control of operational drivers and financial health

FP&A teams need greater flexibility and foresight to navigate fluctuating interest rates, rising risks, and ongoing economic uncertainty. But outdated tools, siloed data, and rigid processes often limit visibility and slow down decision-making.

Anaplan for Finance provides a connected, AI-infused planning engine that links drivers to financial and operational plans, so companies can:

- Forecast the full P&L — including premiums, commissions, claims, reinsurance, and expenses — for a complete financial view.
- Improve reserve accuracy and plan for future claims with smarter forecasting models.
- Accelerate reporting with automated consolidation and real-time financial insights.
- Run ad hoc scenario modeling and analysis to guide better, faster decisions.
- Enhance balance sheet forecasting with data from finance, regulatory models (SCR, MCR, RBC), and embedded statistical and AI/ML-based forecasting.

HR AND WORKFORCE

Optimize talent, manage costs, and future-proof your workforce

Managing operating expenses with strategic workforce planning is essential—but changing demand, hybrid work, and skill shortages make it increasingly complex.

Anaplan for HR and Workforce delivers real-time visibility into workforce capacity, helping align talent, control costs, and stay responsive to changing workforce need.

- Model workforce needs by line of business to align headcount, skillsets, and costs with operational goals.
- Optimize call center and branch staffing at an intra-day level to boost SLAs, NPS, and customer satisfaction.
- Improve forecast accuracy to reduce budget variance and optimize labor spend across channels.
- Design forward-looking talent strategies that adapt to evolving needs and align with business goals and budgets.
- Run “what-if” scenarios to evaluate the impact of staffing changes, skill gaps, and organizational changes in real-time.





SALES AND MARKETING

Drive profitable growth with strategic GTM planning

Evolving policyholder expectations, complex advisor networks, and an increasingly competitive market demand strategic responsiveness, but disconnected go-to-market (GTM) strategies and rigid planning often lead to lost opportunities and underperformance.

Anaplan for Sales and Marketing provides greater visibility into the commercial levers driving premium growth, advisory productivity, and channel performance, improving execution and ROI.

- Design, model, and optimize GTM plans with a centralized data hub to align strategy with execution.
- Align territories and resources by market potential and advisory eligibility for optimal coverage.
- Motivate and drive performance with targeted, rule-based incentive programs.
- Gain premium and pipeline visibility to improve quotas, resource planning, and strategic decisions.
- Use AI-driven insights to refine GTM strategies, maximize ROI, and align sales, marketing, and finance.

From insight to impact: Modern planning that drives results

Leading insurance companies trust Anaplan to plan and execute with greater speed, precision, and adaptability. By connecting strategy to execution across the enterprise, they stay ahead in a fast-changing market.

SUCCESS STORY:

AXA **reduced 50%** of P&L creation time and achieved **100% data accuracy**, freeing teams for deeper analysis.



SUCCESS STORY:

Marsh eliminated a 30-day sales data lag and **accelerated the pay cycle by 50%**, boosting focus and motivation.



SUCCESS STORY:

Markel **cut planning cycle time by 60%** (from 18 weeks to seven weeks) and saved 6,000 annual finance hours for higher-value work.



SUCCESS STORY:

RSA eliminated four months from FP&A and **increased workforce planning productivity by 50%**, enabling focus on strategic tasks.



Contact us today to explore how to transform your enterprise planning.

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

