

# Transforming enterprise planning for professional and business services

Navigate market volatility, manage risk, and drive long-term success



## Reimagining planning for confident decision-making

In today's fast-moving environment, professional and business services must rethink how they plan to stay ahead. From volatile trading conditions, evolving regulations, and increasing investor demands, the challenges are nonstop. Navigating this complexity requires rapid responsiveness and strategic foresight — capabilities traditional planning tools simply cannot deliver.

A gap between strategy and execution doesn't just cause delays — it leads to missed revenue and lost opportunities. Every strategic shift — across

finance, sales, HR, or compliance — demands seamless, coordinated responses. Yet siloed systems and outdated processes slow momentum and increase risk.

To outpace change, professional and business services firms need dynamic, enterprise-wide planning that connects teams, surfaces AI-driven insights, and fuels 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 bring 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, ensuring seamless collaboration and greater efficiency.

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

## FINANCE

### Gain transparency into risk, liquidity, and financial health

Market volatility and regulatory complexity demand greater flexibility and foresight from FP&A teams — but legacy tools and siloed data often delay critical decisions.

**Anaplan for Finance** provides a connected, AI-infused planning engine that links drivers and models to financial and operational plans — enabling faster, more accurate insights and decisions.

- Enhance transparency by connecting finance, sales, operations, and HR data for real-time insights.
- Improve capacity and utilization planning to optimize staffing, billable hours, and resource allocation by projects, roles, and regions.

- Accelerate reporting with automated financial consolidation.
- Conduct ad hoc scenario modeling and analysis to optimize project revenue and determine the best path forward.
- Enhance project planning with AI/ML-based forecasting to better estimate billable hours and revenue by project.



## HR AND WORKFORCE

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

Managing operating expenses with strategic workforce planning isn't just important — it's essential. But evolving client demands, regulatory requirements, and skill shortages make it increasingly complex.

**Anaplan for HR and Workforce** delivers real-time visibility into talent capacity, helping firms align workforce plans with client needs, control expenses, and pivot with confidence.

- Gain transparency into headcount, billable vs. non-billable roles, skillsets, and workforce costs across the firm.
- Accurately model and forecast compensation packages and their impact on margins and profitability.

- Align talent strategies with business goals and client demand to improve resource allocation and utilization.
- Enhance visibility into talent gaps and forecast future needs to stay ahead of change and accelerate decision-making.
- Run “what-if” scenarios to evaluate the impact of market shifts, regulatory changes, and evolving talent requirements.





## SALES AND MARKETING

### Deliver stronger results with strategic GTM planning

Rising client expectations require firms to adopt sales and marketing plans that are strategically responsive — but misaligned go-to-market (GTM) strategies and static planning often lead to missed opportunities.

**Anaplan for Sales and Marketing** provides greater visibility into the drivers of sales performance and tools to build a connected revenue strategy — improving ROI and accelerating growth.

- Set transparent quotas across business units and services to drive accountability and performance.
- Uncover revenue potential of accounts and segments, and determine sales capacity needed to hit your targets.
- Create incentives, bonuses, and pay for performance programs that drive motivation and retain top talent.
- Track sales performance and forecast sales and demand, with a commitment to sales excellence.
- Use AI-powered insights to refine GTM strategies, maximize ROI, and align sales, marketing, and finance.



## From insight to impact: Modern planning that drives results

Leading professional and business services firms 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

PwC **accelerated annual budgeting by 40%** and automated workforce and finance data processes, saving 20,000+ hours annually.



### SUCCESS STORY

Avanade connected planning, boosted forecast accuracy and FP&A productivity, **cutting planning cycles by 20%**.



### SUCCESS STORY

Deloitte Germany **cut 50% of its planning cycle time**, enabling 1.5-day scenario-driven meetings and rapid 3-month deployment.



### SUCCESS STORY

Cox Automotive's revenue-based quotas **aligned sales with business goals**, enabled trend analysis, and improved market agility.



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

