



Maturing Your Anaplan CoE: The Journey to Self-Sufficiency

*OEG Workshop
ACE San Diego
June 5, 2023*



Overview of [insert your CoE name]

WHO ARE WE

- Creation Date:
- Total Size: # of people (and MBs)
- Location (geo):
- # of Live Use Cases:

COE MISSION STATEMENT

Ex) To enable others on the power of
Connected Planning through Anaplan

WHAT'S THE COE'S MANDATE?

- Mandate:
- Approved Sponsor:
- Targets:
- CoE's Primary Contact:

WHY DO WE EXIST/ HOW DID IT START

Answer goes here

WHERE DOES IT SIT

Note: Where in the business is it, which groups are represented, how is IT involved

WHAT DOES OUR COE VALUE (please highlight relevant ones)

Governance	Planning Strategy	Breaking down Silos
Model Building	Expansion	Cheerleading & Advocacy
Best Practices	Innovation	Training & Enablement
Internal Alignment	Model Maintenance	Camaraderie

OUR COE IS GREAT AT

Ex) We are most proud of our customized training for new Anaplanners



Team Structure

Activity 1



Activity

With Olaf's help, Anna now has a list of CoE roles that she wants to include on her team. Elsa has provided a list of Arendelle employees that may be a good fit for the CoE.

In your group, review the list of employees and determine which employees would be the best fit for the various CoE roles.

Guidelines:

- Only assign employees that would be a good fit. No need to assign all employees!
- Some employees may need to fill multiple roles and wear different hats.
- Consider if you want to train anyone into a new role or even hire someone new.
- Revisit the list of Arendelle's current use cases
- Consider each employee's location as it may impact your decision

Employee Roster at Arendelle Analytics

Name	Job Title	Skills	Location
Anna WarmHeart	Sr. Manager, Planning Transformation	Certified Master Anaplaner	New York
Elsa ColdFusion	Vice President, Finance Transformation	Corporate Finance, Transformation, Level 1 MB	New York
Hans Hansen	Senior Finance Analyst	Excel, SQL, Hyperion, Level 1 MB	New York
Bruni Olsen	Senior Analyst, FP&A	Google Sheets, Anaplan Certified Model Builder	New York
Iduna Jensen	General Manager, EMEA	Excel, Manufacturing, P&L Management	Paris
Kristoff Kristiansen	Principal Data Scientist	Python, Data Science, BI	New York
Nokk Nilsen	Senior Business Analyst	SSO, Security, Python	New York
Agnarr Amundsen	Principal Data Warehouse Engineer	Data Management, SQL, BI, Level 1 MB	Bangalore
Mattias Larsen	Finance Analyst	Excel	Bangalore
Oaken Okersen	Sr. FP&A Manager, EMEA	Excel	Paris
Erik Nielsen	Senior Compensation Analyst	Excel	Bangalore
Francis Beck	Software Engineer II	Python, Java, Software Architecture	San Francisco
Sven Sorensen	Regional Vice President, APAC Sales	Sales Strategy	Singapore
Yelana Halvorsen	Director, FP&A, Americas	Cost Center Management	New York
Runeard Rike	Senior Analyst, Finance Operations	Excel	San Francisco
Kai Karlsen	Analyst, Sales Operations, Americas	Excel, Salesforce Developer, Python, VBA, SQL	New York
Astrid Andersen	Jr. Business Systems Analyst	Software Architecture, Systems Administration	Paris
Liv Lunde	Senior Vice President, Product Marketing	Excel, Agile, Team Leadership	New York

Role	Other Names	Objective	Core Behaviors	Key Partners	Assigned Employee(s)
Executive Sponsor	Champion	Ultimate decision maker on direction and focus for Anaplan	Dashboard/app view access	CoE Leader, Model Owner	
CoE Leader (CoE Lead)	Product Owner, Project Manager	Prioritize initiatives to drive business outcomes through Anaplan	Value insights, Championing, Project Management	Executive Sponsor, IT Partner, Model Owner, Certified Master Anaplanner	
Certified Master Anaplanner (CMA)	Solution Architect, Expert Model Builder	Identify new opportunities to connect technologies and businesses for Connected Planning	Cross-functional business process mapping, Integrations, Data Hub	All Model Builders, Solution Architect, CoE Leader, IT Partner	
Solution Architect (SA)	Senior Model Builder, Certified Master Anaplanner	Create standardizations, optimize solutions, and architect solutions with PLANUAL best practices	ALM, Dev, Architectural Design, Data Hub	All Model Builders, Certified Master Anaplanner, Developer, IT Partner, Model Owner	
Model Expert	Certified Model Builder, Senior/ Advanced Model Builder, Certified Solution Architect	Establishes best practices for live models, Executes new builds	Prod and Dev Support: Hierarchies, new modules, DCA, Versions Trains Model Builders	Model Builder, UX Designer, Solution Architect, Model Owner	
Model Builder	Intermediate Model Builder, Experienced Model Builder, Model Admin, Model Owner	Support maintenance, enhancements for live models	Prod and Dev Support: Numbered lists, Security, Trains Model Admins	Model Owner, Model Contributor, UX Designer, Model Expert	
Model Contributor	Junior/New Model Builder; Workspace Administrator, QA Support	The Anaplan technical POC for End Users and Model Owners	Prod model support: User access, technical troubleshooting	Model Owner, End Users, Model Builder, Solution Architect	
Model Owner	Business SME, Process Manager, Process Owner, Global Process Owner	Own functional business processes and data	Anaplan POC for End Users; End user enablement	End User, Model Contributor, CoE Leader	
UX Designer	Model Builder, Business SMEs	Optimize user experience for data visualization and engagement	Page builder, Dashboard, Apps	End User, Model Expert, Solution Architect, Model Owner	
Developer	Integration Specialist, IT Partner	Develop integrations to connect data systems	ETL, APIs (HyperConnect, CloudWorks)	Solution Architect, Model Owner, CoE Leader, IT Partner	
IT Partner	IT Rep, IT Leader	Streamline IT-Business processes and technologies	Security, SSO, License	CoE Leader, Certified Master Anaplanner, Solution Architect, Developer	
Super User	Power End User	Same as End Users, but more engaged and active in Anaplan	Access and dashboard navigation, questions data and processes, Page Builder	End User, Model Owner, Model Contributor	
End User	Business User	Access Anaplan to perform part of their job	Login, Dashboard Navigation, Data Exports	Model Owner, Model Contributor	

Hierarchy

Engagement

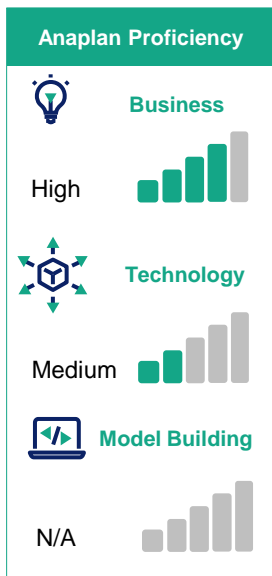


EXECUTIVE SPONSOR

Emergence of this Persona

The Executive Sponsor continues to be critical to the success of the CoE. As a senior leader in the organization, they can effectively leverage Anaplan to drive business transformation and create high value impact.

This role is most impactful when it's dedicated to one person—rather than having split ownership across different leaders—as they can prioritize the objectives and align on team on a single mandate.



Other Names

- Champion, Decision Maker

Core Responsibilities

- Set the vision and intent of Anaplan within the organization
- Gain buy-in from organization at top level to drive cross-functional transformation
- Ensure that the organization's strategic direction is aligned with the Anaplan Platform

Persona's Goal

- Transform the business on Anaplan



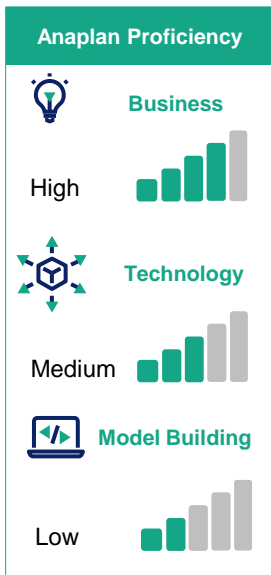
“[Without a sponsor] we don't have a strategy, vision for Anaplan...so it's hard to justify for more”



COE LEADER (COE LEAD)

Emergence of this Role

A standard role in the CoE, we have learned that the most impactful CoE Leads go beyond and build cross-functional relationships to champion the value of Anaplan. In addition to managing the CoE's operations and prioritizations, they are actively creating new opportunities to expand and establishing themselves as a transformational leader.



Other Persona Names

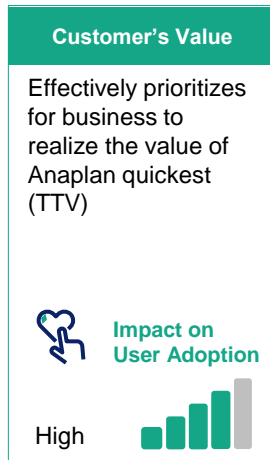
- Anaplan Owner, Product Owner, Product Manager, Project Manager

Core Responsibilities

- Build relationships at senior levels of the organization to drive influence, consensus and to ensure optimal adoption of Anaplan
- Collaborates with cross-functional business leaders to ensure Anaplan solutions address business requirements and effectively enable stakeholders to deliver business insights
- Clearly defines, sets project objectives, KPIs, scope and cascade strategy for the CoE. Communicate impact and ROI to stakeholders

Persona's Goal

- Create paths for connected solutions while ruthlessly prioritizing ongoing requests to evolve existing models

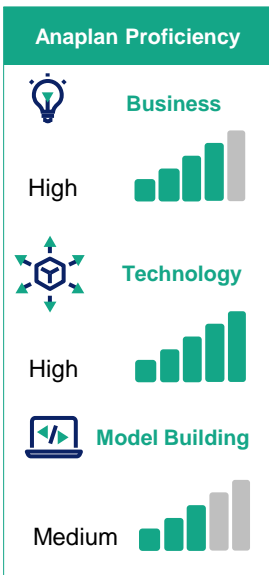


"CoE Leads are important. They are champions who can articulate Anaplan's value"

CERTIFIED MASTER ANAPLANNER (CMA)

Emergence of this Persona

As customers lean on Anaplan as the enterprise planning platform, they realize having cross-functional planning across other businesses and tools are becoming a bigger priority. The Certified Master Anaplanner has elevated responsibilities and brings deep planning expertise and can effectively guide both the business and IT to a new wave of connected and autonomous planning.



Other Persona Names

- CoE Leader, Solution Architect

Core Responsibilities

- Work closely with the CoE and business leaders to shape the long-term Anaplan roadmap by identifying new use cases, exploring new features, and instilling solution development standards
- Conceive and develop "Proof of Concepts" models to showcase how things will translate in real-time scenarios and to establish credibility of the Anaplan platform for consideration
- Leverage in-depth expertise of organization's business processes to develop relevant solutions to improve planning processes, data quality, and experience through Anaplan

Persona's Goal

- Create a cross-functional connected roadmap (Honeycomb) with deployment prioritizations and timelines

Customer Value

Push your organization to the next level of planning and foster cross-functional collaboration and efficiencies

“Master Anaplanners are responsible for promoting Anaplan, [they] elevate it to the next level”

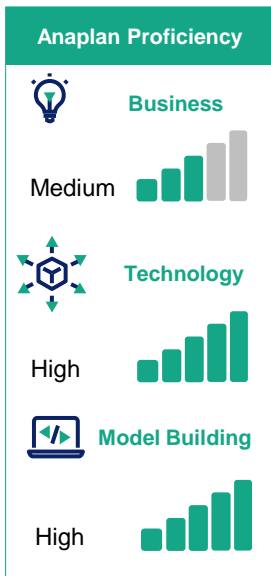


CERTIFIED SOLUTION ARCHITECT (CSA)

Emergence of this Persona

Solution Architects are enforcers of PLANUAL and guides the Model Builders to produce optimal solutions. They create best practices that tie Anaplan's technology into the business processes and prioritizes optimized models and performances.

As customers mature their Anaplan footprint, the Solution Architects become centralized and focused to their main function and works with the Certified Master Anaplanners for cross-functional partnerships



Other Persona Names

- Senior Model Builder, Expert Model Builder, Certified Master Anaplanner, Anaplan Architect, Anaplan Administrator

Core Responsibilities

- Drive scale by standardizing and enhancing methodologies across model landscapes, maintenance processes, and documentation
- Own configuration and maintenance of centralized models and Data Hub
- Deliver end-to-end implementations (UAT and ALM) by designing, implementing, and optimizing models in Anaplan, while working closely with partners in IT and the business

Persona's Goal

- Design and deliver a roadmap to optimize and scale Anaplan within the business function

Customer's Value

Maximize your workspace allocation by reducing sparsity and optimizing for efficiency and scale

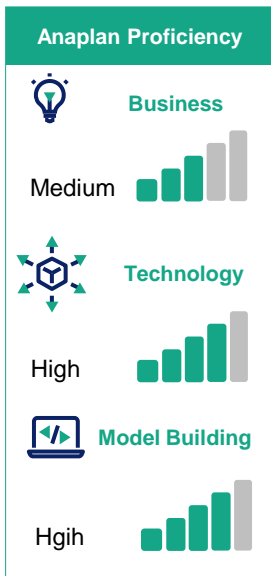
"SAs focused are more technical and focused on model schema"

MODEL EXPERT

Emergence of this Persona

Model Expert are invested Anaplan professionals who continue to expand their model building expertise and platform knowledge by identifying new use cases that can connect to current models.

They have elevated model building responsibilities that make the application of The Anaplan Way critical to their success.



Other Persona Names

- Certified Model Builder, Senior Model Builder, Advanced Model Builder, Lead Modeler, Anaplan Associate, Solution Architect

Core Responsibilities

- Design and develop new models and enhance existing models to support the team's goals and plans as part of the connected solution evolution
- Identify opportunities for data and process automations and efficiency
- Establish governance around model designs, builds, and standardizations that combines Anaplan best practices with the business's culture

Persona's Goal

- Can identify and design the builds for new use cases that'll connect to the existing models. Experienced in at least 1 end-to-end new build implementation and has Level 3 Model Building Certification

Customer's Value

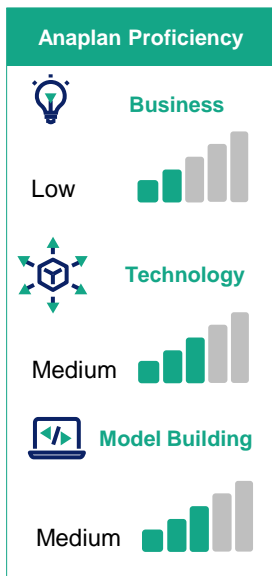
Develop best practices and optimize processes and streamline business decisions

"They know all the ins and outs of the models: maintenance, questions, and reviews are completed by them"

MODEL BUILDER

Emergence of this Persona

Model Builders are the backbone of creating a strong foundation for Customers and aid in minimizing the risks from unexpected attrition. They can independently sustain and enhance existing models with limited architectural support.



Other Persona Names

- Intermediate Model Builder, Experienced Model Builder, Model Admin, Model Owner

Core Responsibilities

- Confirm user stories and enhance existing models to meet business requirements
- Follow Anaplan best practices for model design (DISCO) to drive consistency across all models
- Maintain and configure Anaplan lists, modules, formulas, pages, actions, and other model settings with minimal direction

Persona's Goal

- Can enhance existing models and build upon on formulas and functionalities with independently. Acquired Level 2 Model Building Certification

Customer's Value

Independently manage existing models with limited reliance on external support

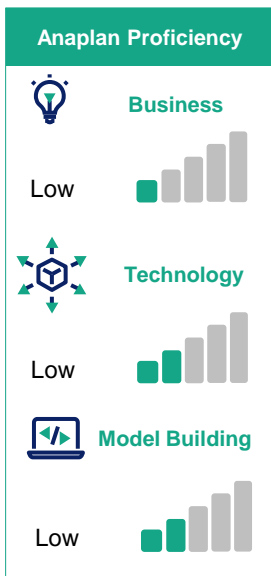
"Bringing [model builders] up to speed as it is worth the investment to maintain the base knowledge"

MODEL CONTRIBUTOR

Emergence of this Persona

Derived from Model Builders, Model Contributors are seen as the entry point for any planning professionals looking to learn Anaplan. They require extensive guidance to pick up model building and are recommended to start with live and existing models to build their Anaplan proficiencies.

Therefore, their top priorities are to learn the existing models and to support the business users on their day to day.



Other Persona Names

- Junior Model Builder, Workspace Administrator, Model Administrator, QA Support Analyst

Core Responsibilities

- Contribute to existing models and be the first line of support for end users
- Provide ongoing and day-to-day support and troubleshooting like model access, dashboard navigation (like pivot and drill down), data validation as well as imports and exports
- Enable end users by regularly providing trainings to help achieve self-reliance on model use and engagement

Persona's Goal

- Able to make basic changes in existing models by referencing available resources and acquire Level 1 Model Building Certification with limited guidance

Customer's Value

Seamless way to create model building talent and secure knowledge continuity



Impact on User Adoption

High

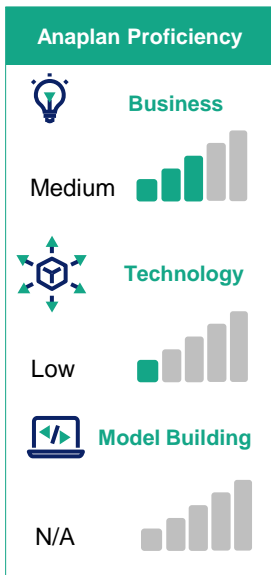


"[Model Contributors] are worth the investment to maintain the base knowledge"

MODEL OWNER

Emergence of this Persona

Model Owners are becoming prevalent in either customers with a mature Anaplan footprint or customers driving business transformations through Anaplan. Assumed by a business process owner, they create ongoing demand for the CoE and creates prioritizations for enhancements, new use cases, and training as requested by the end users.



Other Persona Names

- Power End User, Super Users, Business SMEs, Process Managers, Global Process Owners

Core Responsibilities

- Ensure all applications are connected and supporting its end users' responsibilities to drive expected outcomes
- Identify opportunities to optimize processes by leveraging more functionalities in Anaplan
- Cultivate a culture of collaboration through cross-functional partnerships that enable connected solutions

Persona's Goal

- Identifying new use cases to migrate to Anaplan to create a connected solution in their function



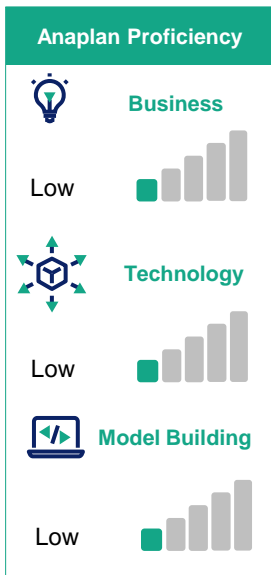
"[They are] managers of the business process and aren't just business SMEs"



USER EXPERIENCE DESIGNER (UX DESIGNER)

Emergence of this Persona

Designing dashboards and apps that creates positive user engagement is a growing desired focus in mature customers. Though Model Builders were historically responsible for design, it became apparent that it needs its own dedicated focus with different skillsets to ensure that the designs are consistent, intuitive, and relevant to what the business users need.



Other Persona Names

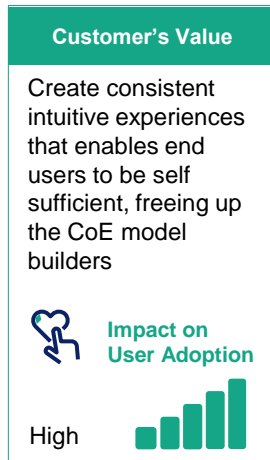
- Model Builder, Business SME

Core Responsibilities

- Work with end users to design and reimagine Anaplan models' user interfaces
- Increase end users' engagements by creating models with proper visualizations and data representation
- Create design standardizations for the CoE model builders to leverage for existing and all new models

Persona's Goal

- Create design standardizations that all Anaplan models follow for end users to have a consistent and intuitive experiences

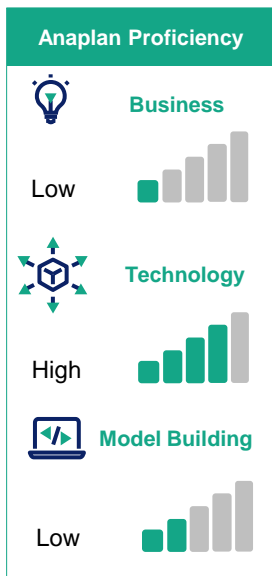


"[they] work directly with end users and provides them with a consistent and seamless experience across all Anaplan models, improving the usability of the dashboards"

DEVELOPER

Emergence of this Persona

As customers look towards leveraging Anaplan as the enterprise planning platform, having seamless integrations across other business tools is becoming a bigger priority. This role is a key member in IT and customer CoEs have been collaborating with IT (or implementation partners) to unlock consistent and accurate data flow into Anaplan, ultimately extending the platform's capabilities and positioning as the planning platform.



Other Persona Names

- Integration Specialist, IT Partner

Core Responsibilities

- Integrates data between applications to enable integrated business processes and planning within Anaplan
- Builds data pipelines from multiple data sources by performing necessary ETL tasks including processing, cleansing, and verifying the integrity of data used for analysis
- Partners with the CoE Leader, Certified Master Anaplaner and/or Solution Architect to identify integrations that will develop new capabilities to expand Anaplan throughout the business

Anaplan Support

Persona's Goal

- Establish connections and automate business processes into Anaplan

Customer's Value

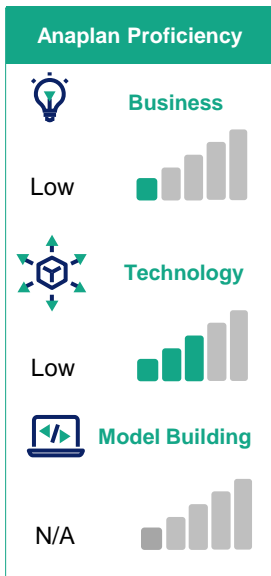
Reduce redundancies, increase automated validations, and create a single source of truth for their data

“this [person] allows the CoE to establish Anaplan as a fully integrated business planning tool and expand its capabilities”

Emergence of this Persona

The partnership between business and IT is critical to Anaplan's success. IT provides security and audit governance to ensure Anaplan continues to meet the standards.

This is an evolving persona, and their Anaplan-specific responsibilities are expected to grow.



Other Persona Names

- Developer, Integrator

Core Responsibilities

- Enact security governance and enforces audit, SSO, and other requirements on Anaplan
- Strategize with business on the technical roadmap and provide check and balances that optimizes Anaplan for the business and IT
- Advise on roadblocks and offer alternatives solutions to support cross-functional connected solutions on Anaplan

Persona's Goal

- Define IT-approved framework that supports the organization's vision for Anaplan

Customer's Value

IT can set expectations on security requirements, integrations, and overall technical governance from the start

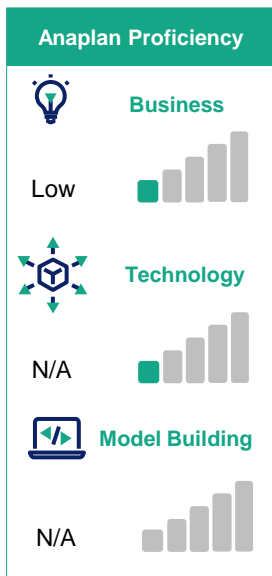
“Every CoE should have representatives from both the business and IT in order to ensure a successful holistic Anaplan implementation”

SUPER USER

Emergence of this Persona

Super Users are a subset of End Users who are engaged and invested. They attend office hours, ask questions, and stay interested in Anaplan in hopes of better understanding the data and processes that's behind their dashboard/app view.

Depending on their background and interests, Super Users can be converted into Model Contributors (technical) or Model Owners (business).



Other Persona Names

- Power End User, Model Admins

Core Responsibilities

- Engaged with Model Owners and CoE Model Builders to learn more about the design and flow of the models
- Provide feedback and enhancement requests that will improve the model experience
- Go beyond view access (My Pages and Page Builder access) to expand their Anaplan exposure and create experiences specific to their background and focus

Persona's Goal

- Independently navigate models and its functionalities and while finding new opportunities to expand the use of Anaplan

Customer's Value

Active engagement secures longevity of the models and keeps it relevant to the business needs



Impact on User Adoption

High

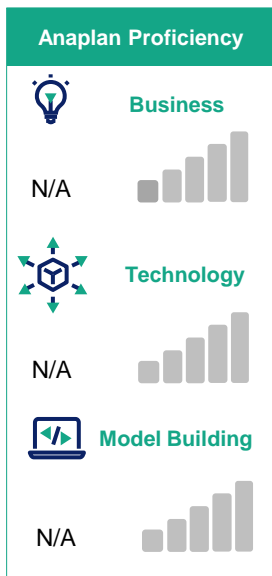


"The value comes from the user actually using the platform and efficiently doing their jobs"

END USER

Emergence of this Persona

The End Users access the dashboards and apps— the outputs of Anaplan—as one of the processes to their day job. Because their typical Anaplan engagement is passive, they require a lot of support from the CoE and other partners to fulfill their responsibilities on Anaplan.



Other Persona Names

- Business User

Core Responsibilities

- Collaborate with Model Contributors to access Anaplan and navigate the required information
- Leverage fundamental dashboard/app (My Pages) functionalities like pivot, drill down, and exports

Persona's Goal

- Independently navigate Anaplan to find relevant information

Customer's Value

As main recipients of Anaplan, they must have seamless experiences with Anaplan

“How do I navigate at a very basic level to understand my data”



Recurring Meetings

Activity 2



Activity

Now that Anna WarmHeart has structured her team, she is ready to put a regular series of meetings on the calendar to organize the CoE's Anaplan efforts. Her Anaplan CSBP has recommended some topics that can be covered in regular CoE meetings.

In your group, use the recommended topics to build an **agenda** and **participant list** for weekly, monthly, and quarterly CoE meetings.



Recurring Meetings

How often does your CoE meet, who are the attendees, and what's on the agenda?

Possible Attendees:

Centralized roles:

- CoE Executive Sponsor
- CoE Leader
- CoE CMA
- Anaplan Customer Success
- Anaplan Executive Sponsor

Federated or centralized roles

(decide to invite all or only for a specific use case):

- Solution Architects
- Model Builders
- Project Managers
- Model Contributors
- Model Owners/SMEs
- UX Designers
- Developers
- IT Partners
- Super Users
- End Users
- External business leads

Possible Agenda Topics:

- Key implementation project status updates
- High-visibility incident management
- Change management progress
- Open issues/challenges
- Data integration statuses
- Architecture updates
- Best practices discussions
- Discuss new Anaplan platform functionalities
- Shared learnings
- Model builder Q&A
- Project prioritization
- Roadmap updates, release calendar, and upcoming milestones
- Key use case demos
- Review support process SLA
- User adoption review
- Enhancement request review
- New platform functionality training
- Strategy update by executive sponsors
- Roadmap update and corporate strategy alignment
- Key successes and demos
- User adoption and feedback assessment
- ROI reporting
- Data Hub optimization
- Knowledge sharing between use case leads

Instructions:

Create agendas and attendee lists for your weekly, monthly, and quarterly meetings



Recurring Meetings

How often does your CoE meet, who are the attendees, and what's on the agenda?

Weekly	Monthly	Quarterly
Title:	Title:	Title:
Attendees:	Attendees:	Attendees:
Meeting Agenda:	Meeting Agenda:	Meeting Agenda:

Other Meetings

Please list all



Set the appropriate CoE cadence

Weekly

Incident/Change Management/Project Meeting

Meet with production model owners and support team to ensure smooth ongoing operations, and prioritize upcoming enhancements or substantial defect resolution builds.

Monthly

Service Review

Review performance to Service Level Agreements, measure user adoption and engagement, evaluate change management efforts, and identify key themes within production model requests.

Quarterly

User Feedback

Interview End Users about the usability, performance, and value of their model(s). Collect feedback both quantitatively and qualitatively, and evaluate opportunities to improve their experience.

Quarterly Business Review/Steering Committee

Provide updates to executive sponsors and receive updates on strategic initiatives and decisions, identifying how Anaplan ties to corporate objectives. Share new project updates and overall roadmap.



Prioritization

Activity 3



Activity

Anna WarmHeart created an internal Anaplan request form at Arendelle. End users have submitted several requests over the past few weeks and now she needs to put together a working plan.

In your group, **review the requests** and use the provided framework to **prioritize the asks**.

1. Determine the request type (Defect/Enhancement/New Use Case)
2. Determine the benefit type (More Money/Less Time/Job Satisfaction)
3. Rate the expected benefit on a scale from 1-5
4. Plot the request on the **Prioritization Matrix**

R01: Add prior year expenses to Opex

Team	Opex Planning EMEA
Requester	Greta Jorgensen
App Name	Opex Planning
Page Name	Opex P&L Summary by Region
Problem Statement	We cannot compare last year's expenses to projected spend for next year
Future State Description	We need a new grid or report that includes last year's expenses for all cost centers
Justification	This will help us ensure our forecasts are reasonable compared to the historical actuals. We currently need to refer to an offline spreadsheet to do this.
Rate Effort (1-5)	2
Request Type (choose)	(Defect) // (Enhancement) // (New Use Case)
Benefit Type (choose)	(More Money) // (Save Time) // (Increase Job Satisfaction)
Rate Expected Benefit (1-5)	

R02: Connect workforce planning to compensation process

Team	Global Sales Operations
Requester	Erik Nielsen
App Name	Workforce Planning
Page Name	N/A
Problem Statement	We heard that you are using Anaplan to plan out future hires and associated costs. We want to leverage this data to help us predict cost of sales compensation for our current and future hires.
Future State Description	We have an Excel file we currently use for this, but we want to import that data into Excel, share that spreadsheet with all our compensation analysts and sales managers, collect feedback, and then deliver a compensation forecast to our leadership. We want to update this on a monthly basis.
Justification	It's very hard for us to access this data now and we need to wait until workforce planning is done.
Rate Effort (1-5)	5+
Request Type (choose)	(Defect) // (Enhancement) // (New Use Case)
Benefit Type (choose)	(More Money) // (Save Time) // (Increase Job Satisfaction)
Rate Expected Benefit (1-5)	

R03: Field missing data

Team	Global FP&A
Requester	Ingrid Rutger
App Name	Long Range Planning
Page Name	Five Year Forecast
Problem Statement	I cannot see any data for the Western Europe region
Future State Description	Other people can see the data, but I need to see the data
Justification	I need to see the data to do my job
Rate Effort (1-5)	1
Request Type (choose)	(Defect) // (Enhancement) // (New Use Case)
Benefit Type (choose)	(More Money) // (Save Time) // (Increase Job Satisfaction)
Rate Expected Benefit (1-5)	

R04: Ability to filter by sub-region

Team	Global FP&A
Requester	Ingrid Rutger
App Name	Long Range Planning
Page Name	Five Year Forecast
Problem Statement	I need to be able to filter my data by sub region.
Future State Description	Currently I can filter by Region, Business Unit, and Manager, but I would like to be able to filter by Sub Region as well. I can do this on other pages, but want this added to this page.
Justification	This will help me focus better on fields I need to fill out
Rate Effort (1-5)	1
Request Type (choose)	(Defect) // (Enhancement) // (New Use Case)
Benefit Type (choose)	(More Money) // (Save Time) // (Increase Job Satisfaction)
Rate Expected Benefit (1-5)	

R05: Ability to create new cost centers

Team	Opex Planning EMEA
Requester	Greta Jorgensen
App Name	Opex Planning
Page Name	N/A
Problem Statement	We would like to be able to add new cost centers to the model so that we can add a forecast for these cost centers. We know these costs centers will be added for next year.
Future State Description	It would be good to have a button to add a new cost center and have it show up everywhere
Justification	This will allow us to plan ahead more accurately
Rate Effort (1-5)	2
Request Type (choose)	(Defect) // (Enhancement) // (New Use Case)
Benefit Type (choose)	(More Money) // (Save Time) // (Increase Job Satisfaction)
Rate Expected Benefit (1-5)	

R06: Add scenario planning to revenue plan

Team	Global FP&A
Requester	Ingrid Rutger
App Name	Revenue Planning
Page Name	Target Setting Inputs
Problem Statement	We need to be able to compare different scenarios for target setting
Future State Description	It would be nice to be able to add scenarios and then have our finance managers enter data for different scenarios. We also want to be able to compare between scenarios.
Justification	This will help us come up with a better forecast. We also won't need to download our forecast to Excel to be able to compare different forecasts like our finance managers do today.
Rate Effort (1-5)	4
Request Type (choose)	(Defect) // (Enhancement) // (New Use Case)
Benefit Type (choose)	(More Money) // (Save Time) // (Increase Job Satisfaction)
Rate Expected Benefit (1-5)	

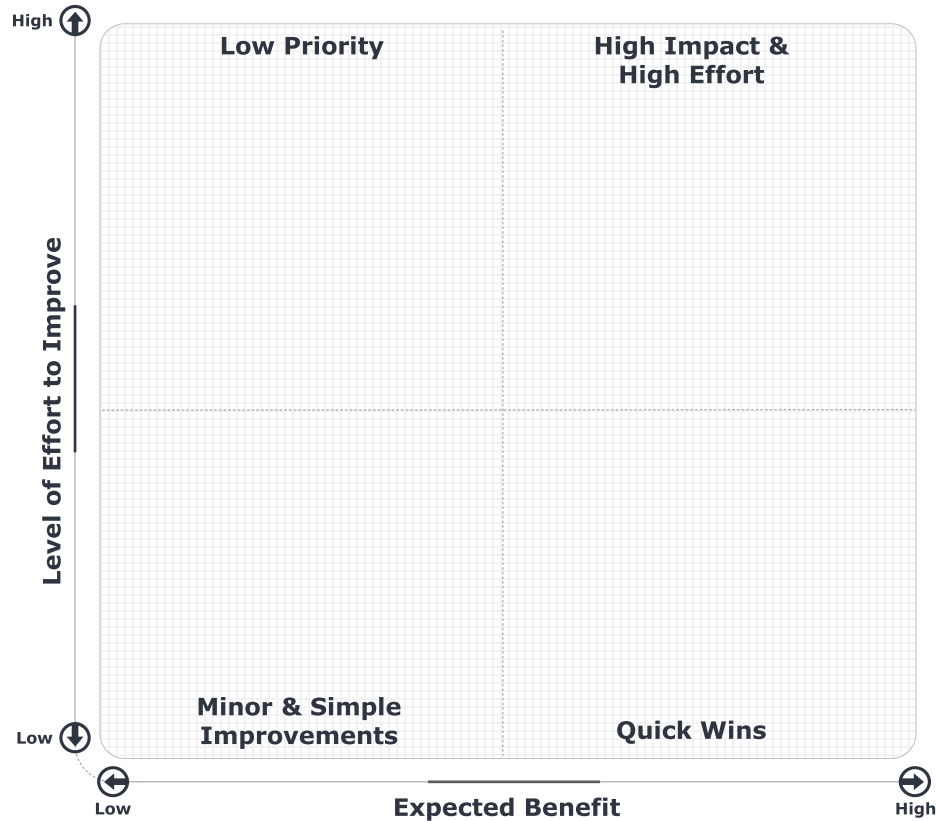
R07: Add an executive level report for our CFO

Team	Global FP&A
Requester	Hanna Rochberger
App Name	Opex Planning
Page Name	N/A
Problem Statement	We currently manually populate a 3-slide PowerPoint presentation every month to provide an update to our CFO on the Opex forecast.
Future State Description	Is it possible to have a PowerPoint-style page with nice formatting so that we don't need to manually populate this presentation?
Justification	Our CFO is a key stakeholder for our entire business and Opex is her primary focus at the moment. Allowing her to have visibility into the forecast is very important, but it takes so much of our time to copy/paste numbers and we've been criticized for making copy/paste mistakes in the past.
Rate Effort (1-5)	2
Request Type (choose)	(Defect) // (Enhancement) // (New Use Case)
Benefit Type (choose)	(More Money) // (Save Time) // (Increase Job Satisfaction)
Rate Expected Benefit (1-5)	

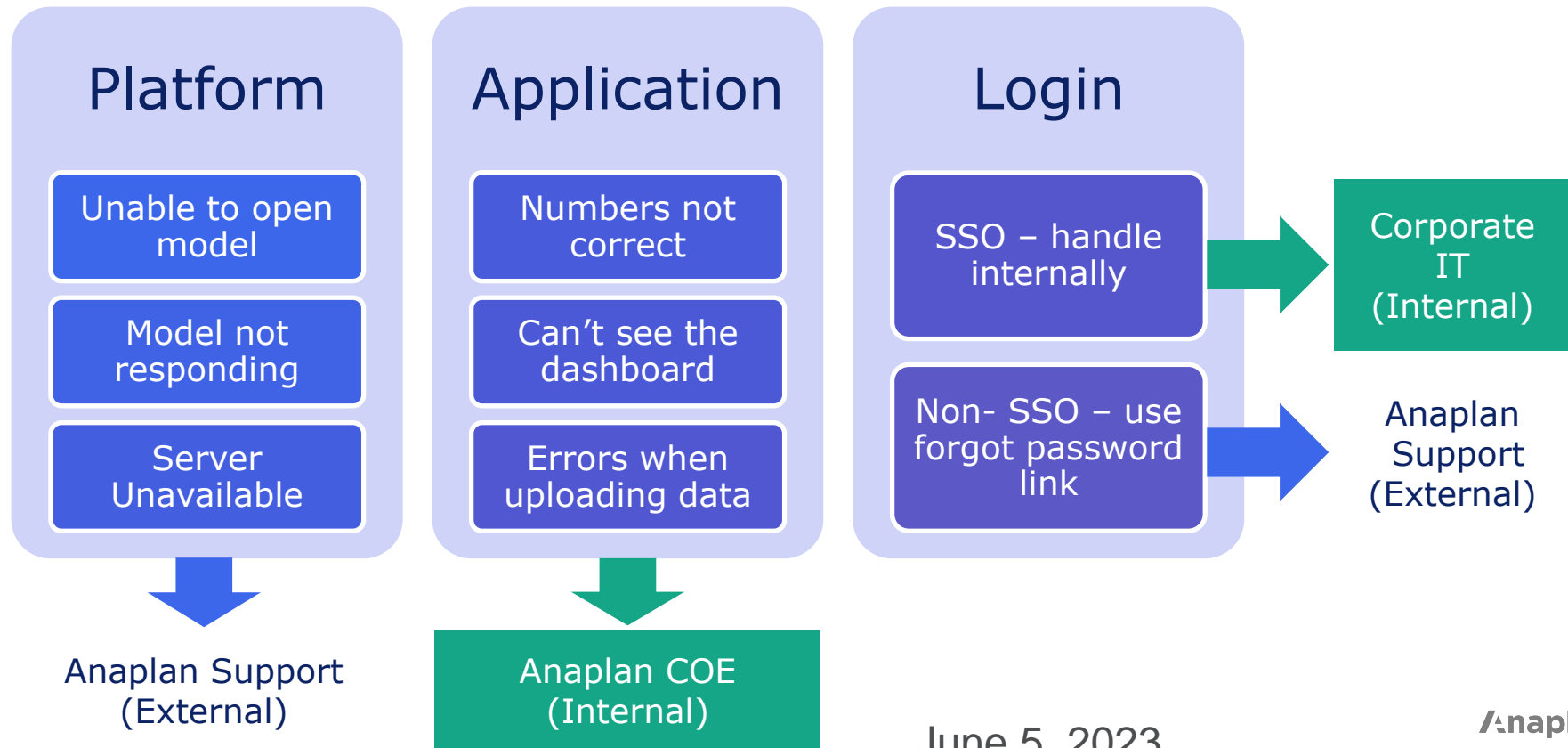
R08: Project management and defect tracking

Team	FP&A Japan
Requester	Alfa Everdeen
App Name	N/A
Page Name	N/A
Problem Statement	We currently use Excel and MS Project to manage our projects, and it's hard to run scenarios
Future State Description	We would like to use Anaplan to track our work in the Global FP&A team. Ideally, our cost center managers will submit requests and we will get automatically notified, and we can prioritize and approve the work and track time completion. We would like to see scenarios for different project plans to determine the best things to work on.
Justification	We like Anaplan for a lot of what we do today and it would be nice to consolidate all our work into a single tool.
Rate Effort (1-5)	5
Request Type (choose)	(Defect) // (Enhancement) // (New Use Case)
Benefit Type (choose)	(More Money) // (Save Time) // (Increase Job Satisfaction)
Rate Expected Benefit (1-5)	

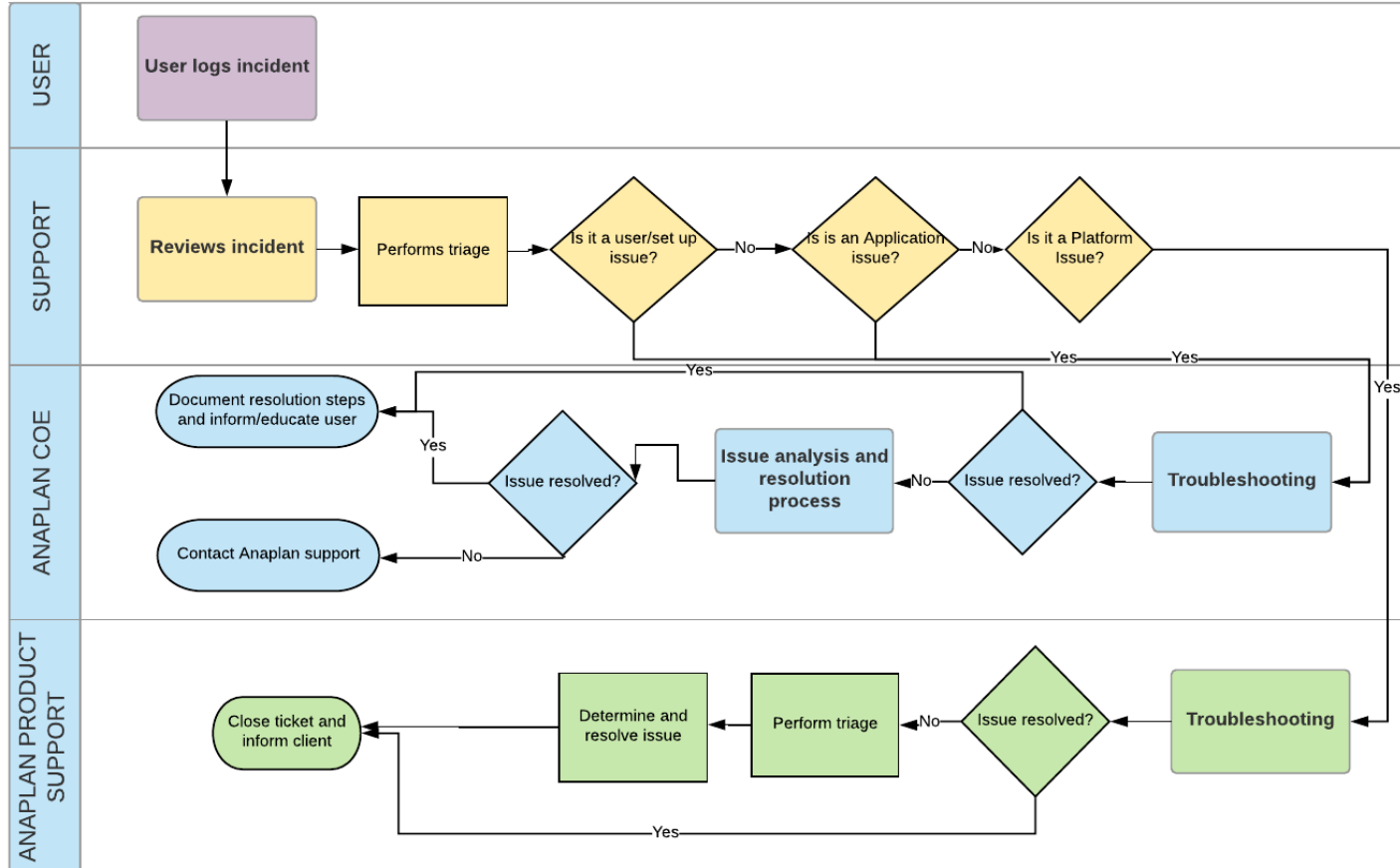
Prioritization Matrix



Example: common support issues and the responsible support owner



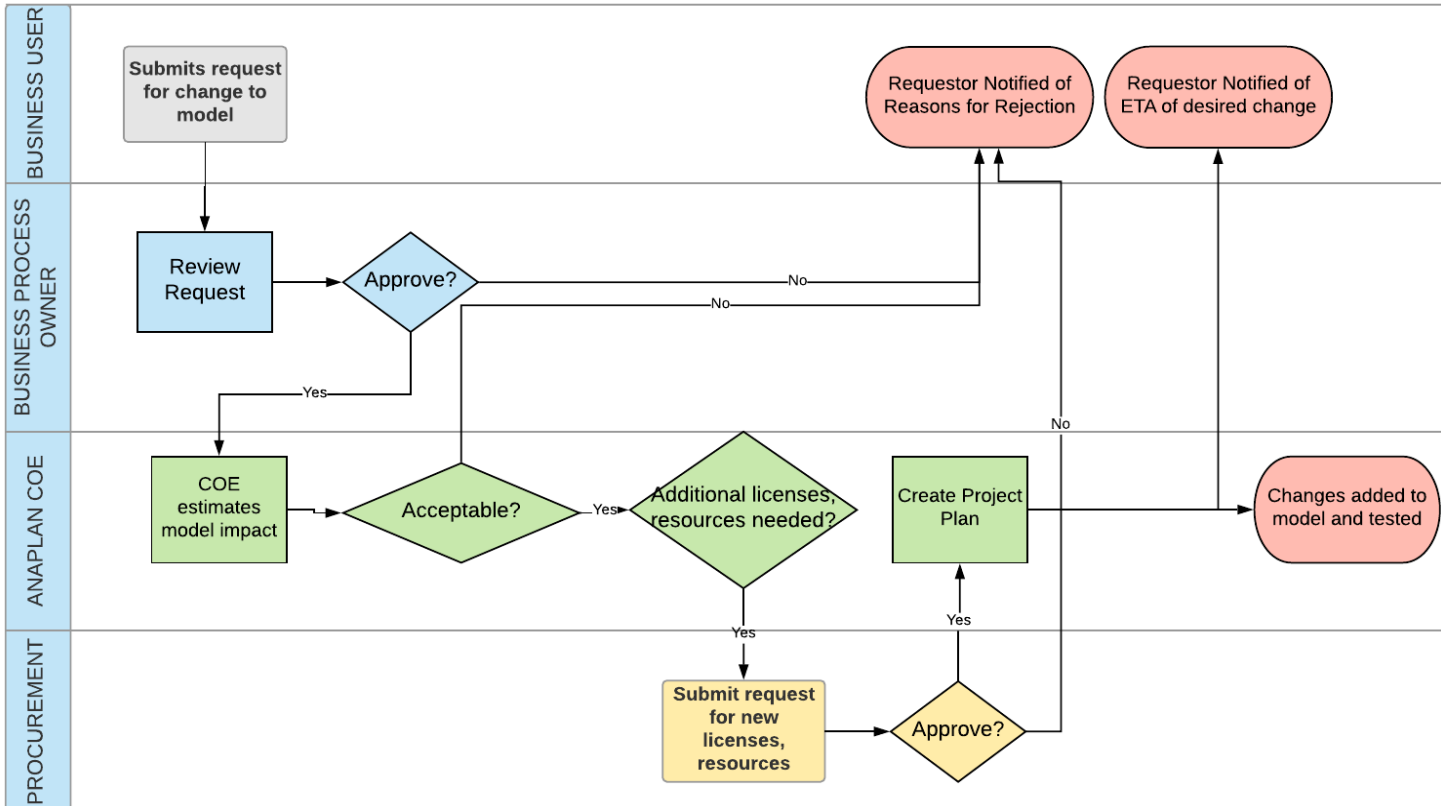
Example: support ticket process



Example: Support Service Level Agreements

Severity	Definition	Response Time	Min Resolution Time	Max Resolution Time
Critical (1)	Critical production issue that severely impacts your use of the service. The situation halts your business operations and no procedural workaround exists.	30 Mins	2 Hours	4 Hours
Major (2)	Major functionality is impacted or significant performance degradation is experienced. The situation is causing a high impact to portions of your business operations and no reasonable workaround exists.	2 Hours	4 Hours	12 Hours
Minor (3)	There is a partial, non-critical loss of use of the service with a medium-to-low impact on your business, but your business continues to function. Short-term workaround is available, but not scalable.	8 Hours	12 Hours	24 Hours
Cosmetic (4)	Inquiry regarding a routine technical issue; information requested on application capabilities, navigation, installation or configuration; bug affecting a small number of users. Acceptable workaround available.	12 Hours	24 Hours	40 Hours

Example: change request process



Example: Change Request SLA

Description	Level of Effort	New Contract Required	SLA Response Time	Min Resolution Time	Max Resolution Time	Sample Requests
Tweak existing functionality	Low	No	1 – 2 Business Days	1 Business Day	3 Business Days	Publish existing component to existing dashboard Add several line items for user-entry or simple formulas
Moderate addition to existing functionality	Medium	No	2 – 3 Business Days	4 Business Days	10 Business Days	Add new dimension to existing calculations Add a new workflow to expand a simple business process
Substantially enhance or expand existing functionality	High	Yes	3 – 5 Business Days	10 Business Days	20 Business Days	Add a new business process to an existing model Create a new set of complex calculations
New Implementation	High	Yes	5 – 10 Business Days	20 Business Days	80 Business Days	Create a new model from the ground up Onboard a new department or business function to Anaplan



Connected Planning Roadmap

Activity 4



Connected Planning Roadmap

The long-term version (the first use case, what's in progress, what's planned, and more) & Internal Endorsement

Who has endorsed this roadmap?

Name:

Title:



Finance



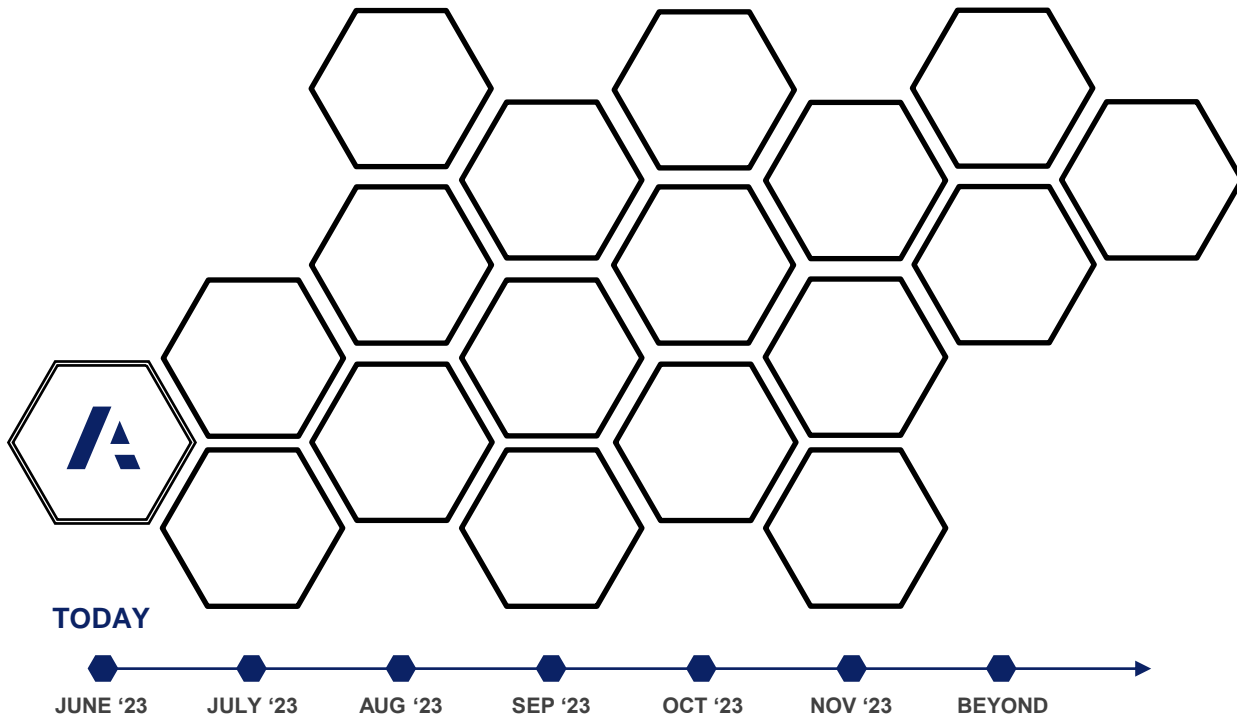
Sales & Marketing



Supply Chain



Human Resources



DATES FOR ILLUSTRATION ONLY. DEPENDANT ON DETAILED REQUIREMENTS.

This is one example of support workflow with SLAs.
Please share your own process

