



# Anaplanner's France

Purpose-built for Connected Planning



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Anaplan

Mardi 5 Octobre 2021



# Anaplan

1 Anaplan User eXperience

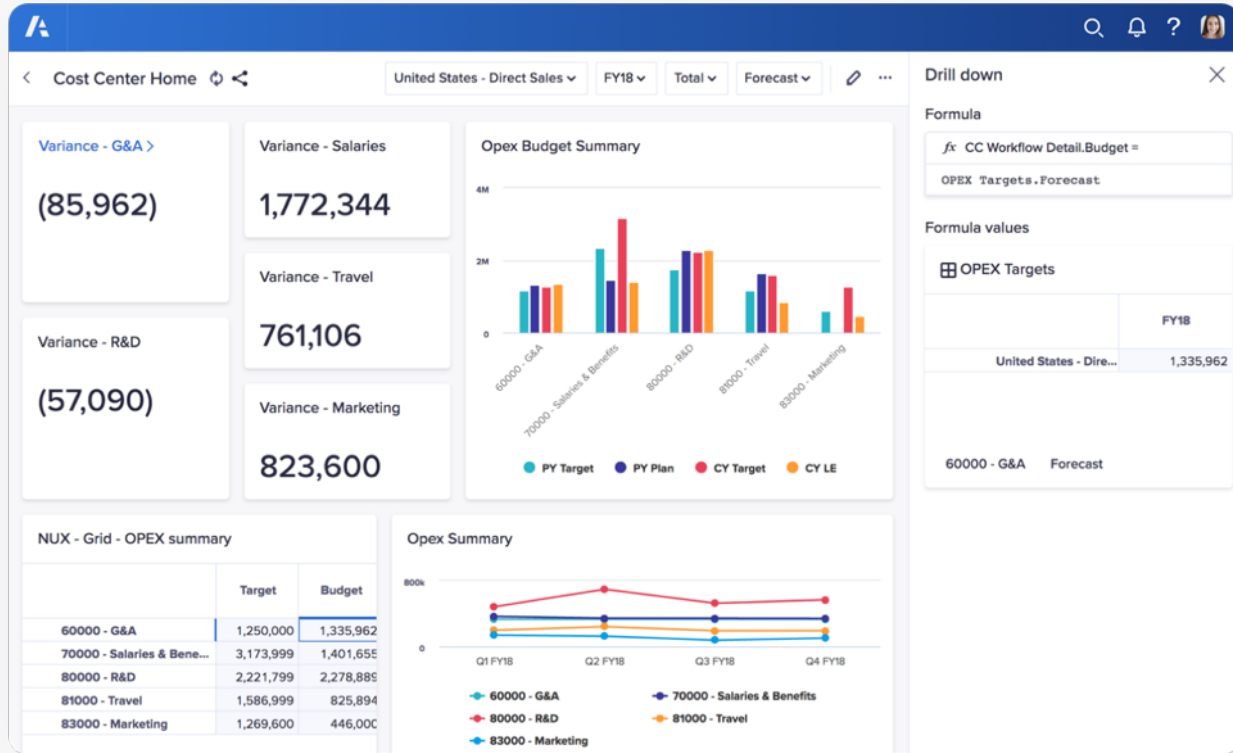
2 Management Reporting



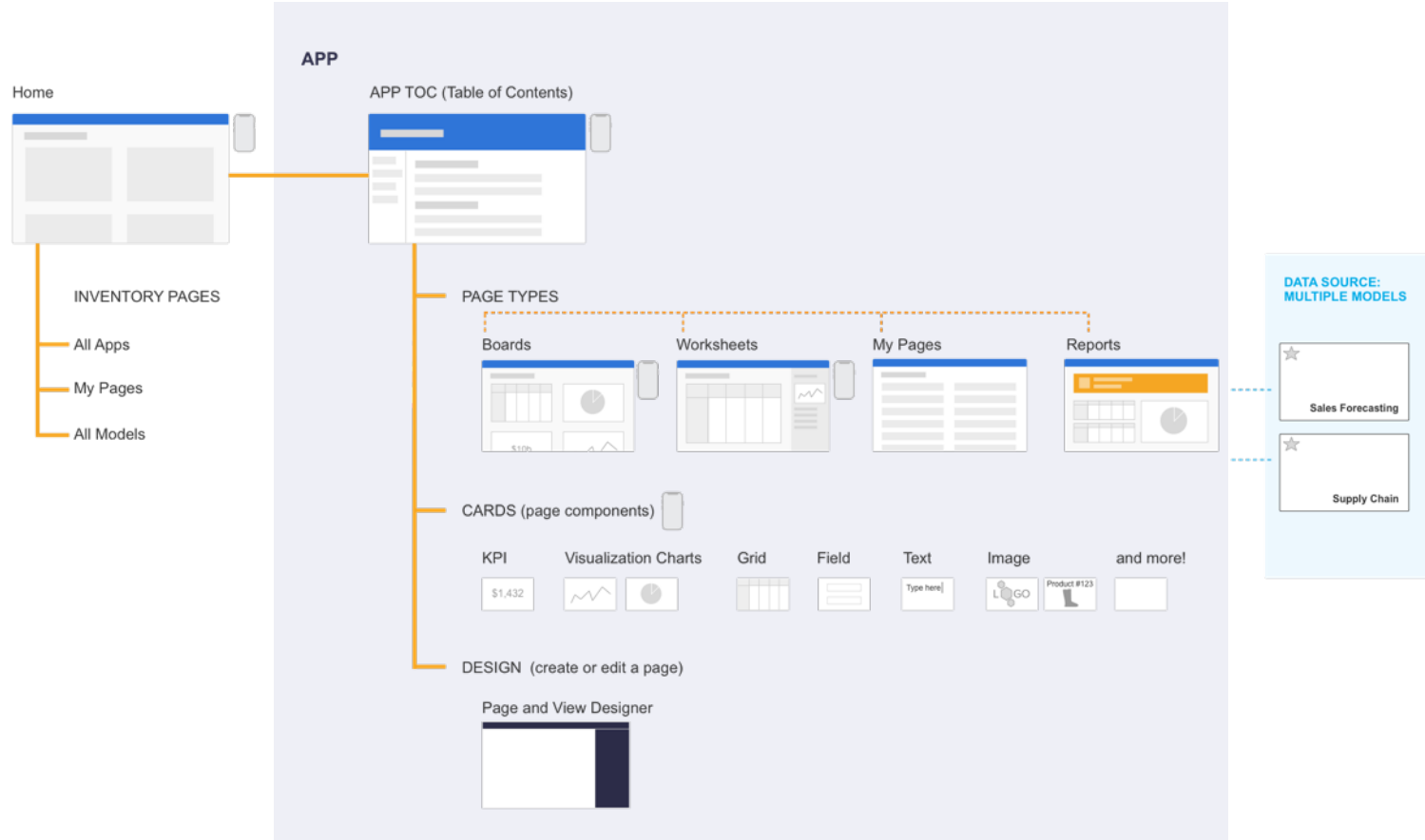
4 Questions & Réponses



# User experience: User interface

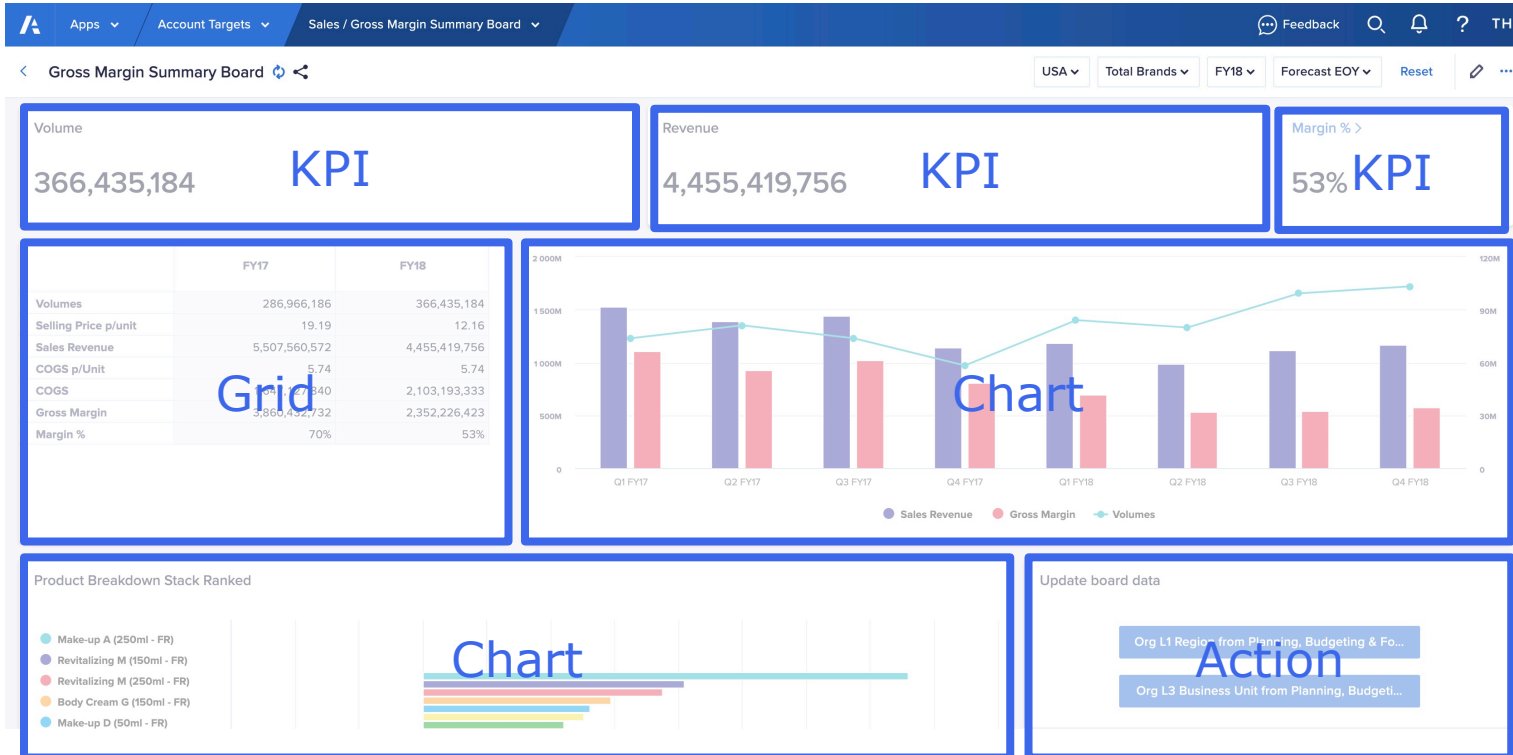


# New UX taxonomy & structure



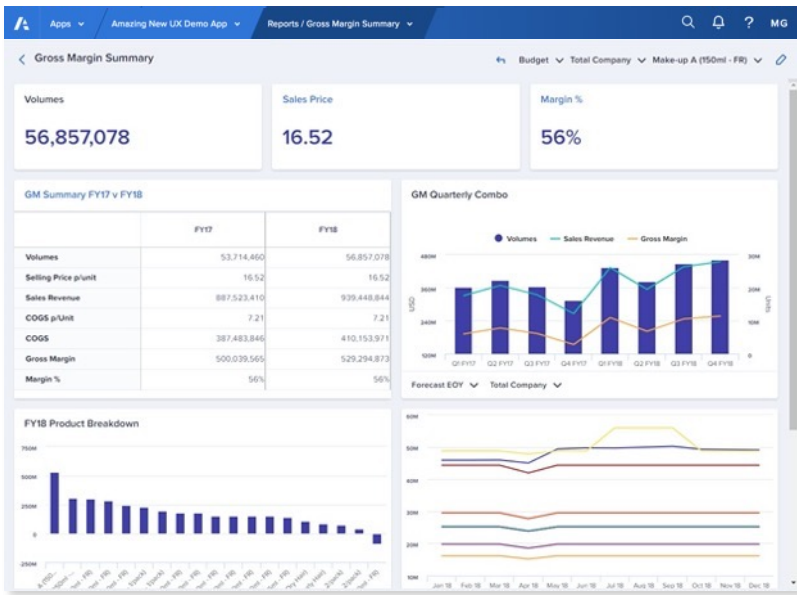
# Cards

Cards are designed to display data in the best way for you to carry out your data analysis  
Some card types allow you to interact with your data

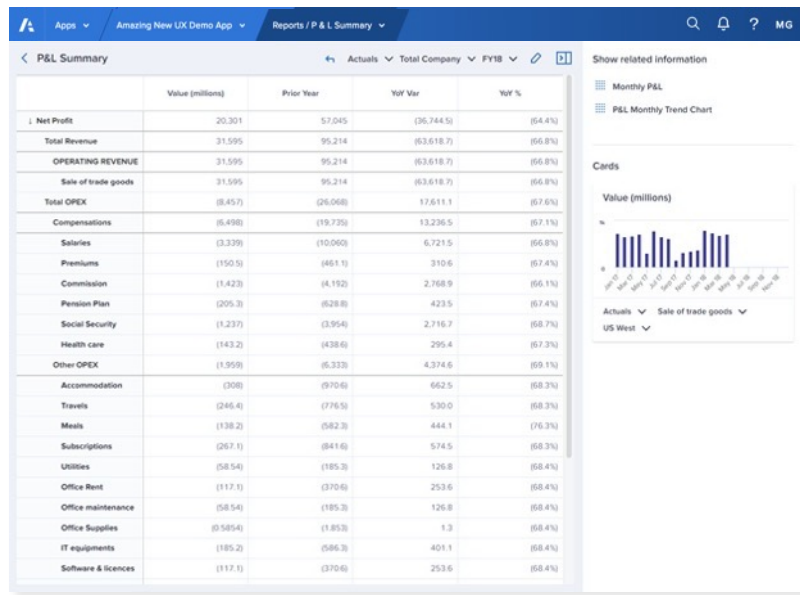


# Pages

## Board "Overview"

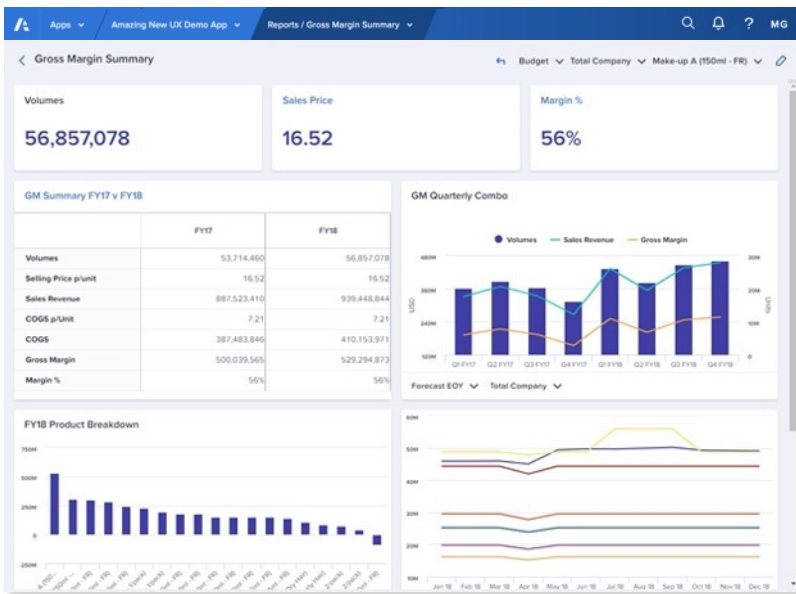


## Worksheet "Detail"

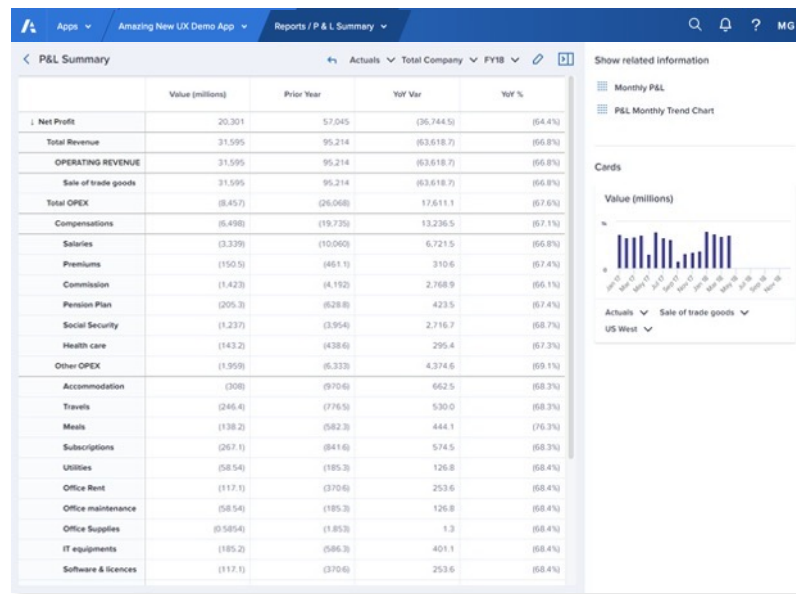


# Pages

## Board “Overview”

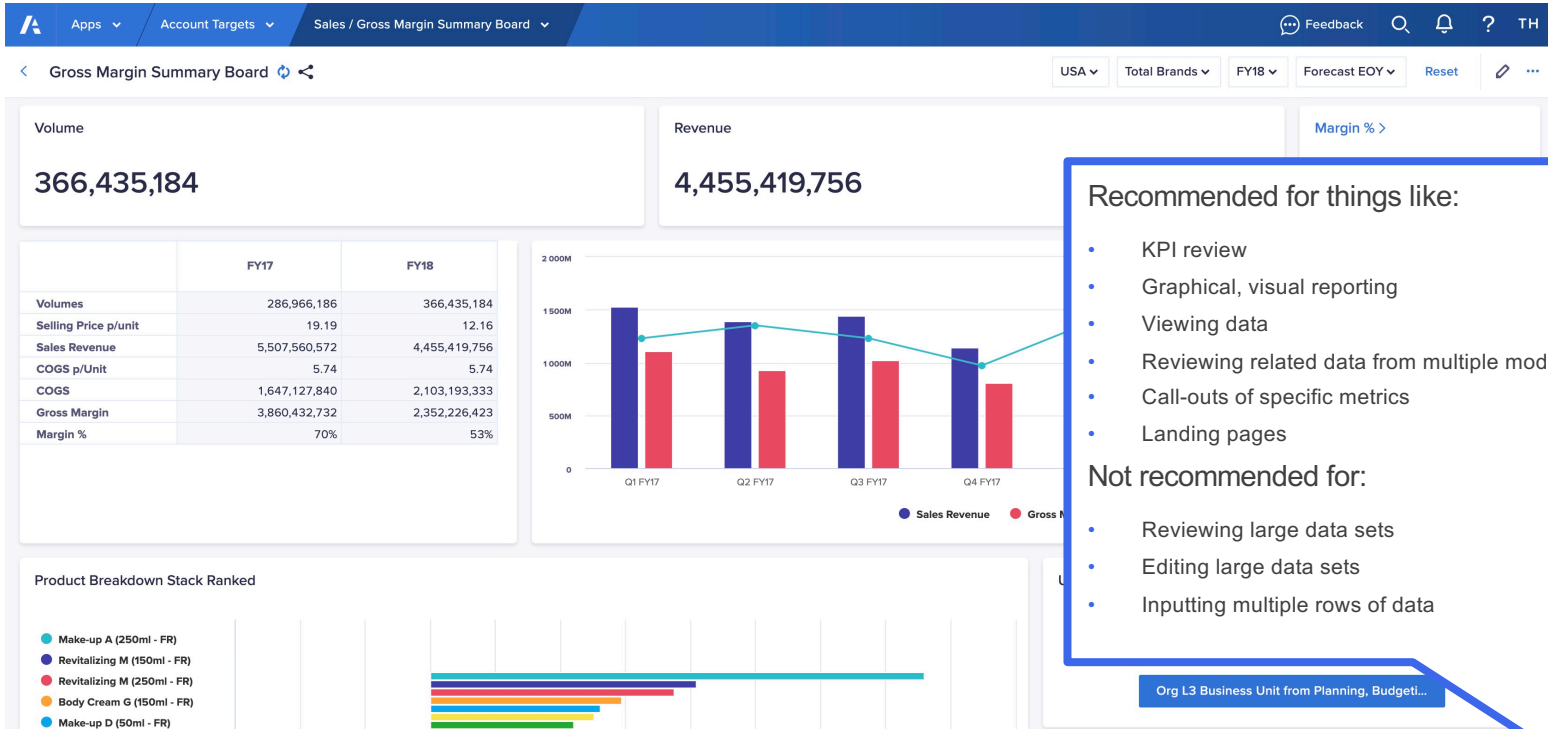


## Worksheet “Detail”



# Boards

Visualize and edit data in a highly polished way



Recommended for things like:

- KPI review
- Graphical, visual reporting
- Viewing data
- Reviewing related data from multiple modules
- Call-outs of specific metrics
- Landing pages

Not recommended for:

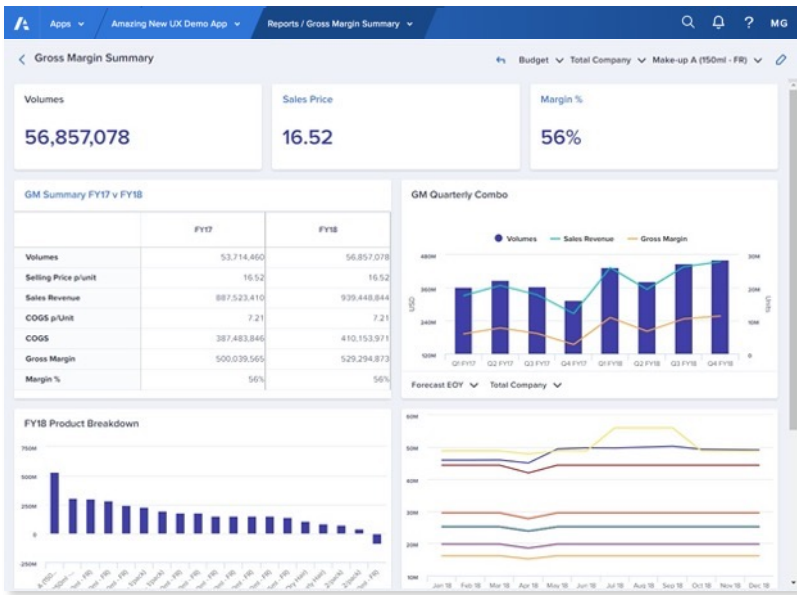
- Reviewing large data sets
- Editing large data sets
- Inputting multiple rows of data

Org L3 Business Unit from Planning, Budget...

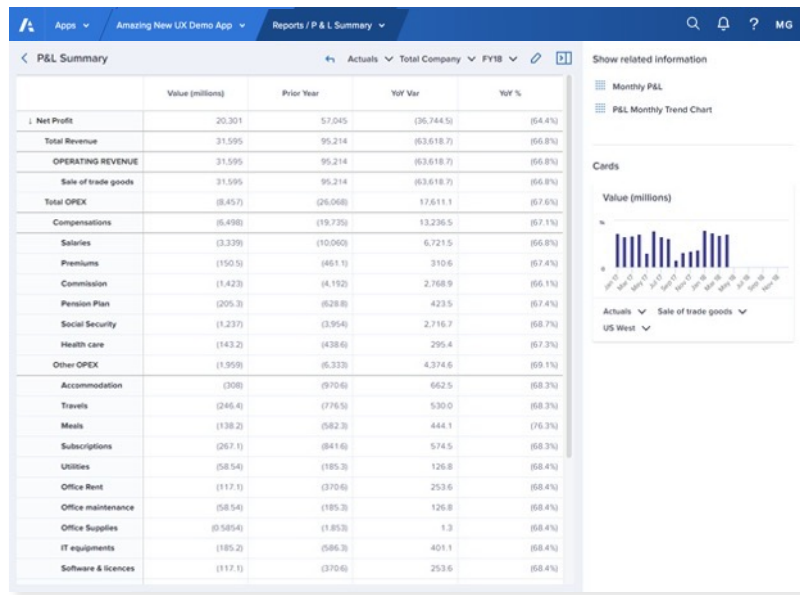


# Pages

## Board "Overview"



## Worksheet "Detail"



## Worksheets: Insights panel

Easily uncover supporting data, drivers, and assumptions

Project allocation

Find...

	UX Lead	UX Support	UXR	Status	Target
Viscount	Dave McGinn		Alicia Crowther	Ongoing design	
Animal	Dave McGinn		Pam Polizzi	Ongoing design	
Demogorgon	Olga Kemmet		Alicia Crowther	Ongoing design	
Reports			Pam Polizzi	Exploration	
Mobile					
Jaegar	Phil Clairret		Pam Polizzi	Ongoing design	
Workflow					
Workflow	Rodney Blythe		Pam Polizzi	Ongoing design	
Platform					

Resource >

Find...

Phil Clairret	0.75
Olga Kemmet	1
Pam Polizzi	1
Olly Aston	1
London	3.75
JK	1
Minneapolis	1

Quick links

UX resource summary

Resource planner

Additional insights

Project Resourcing

Workload by Time

Project Resourcing



Resource >

Phil Clairret	0.75
Olga Kemmet	1

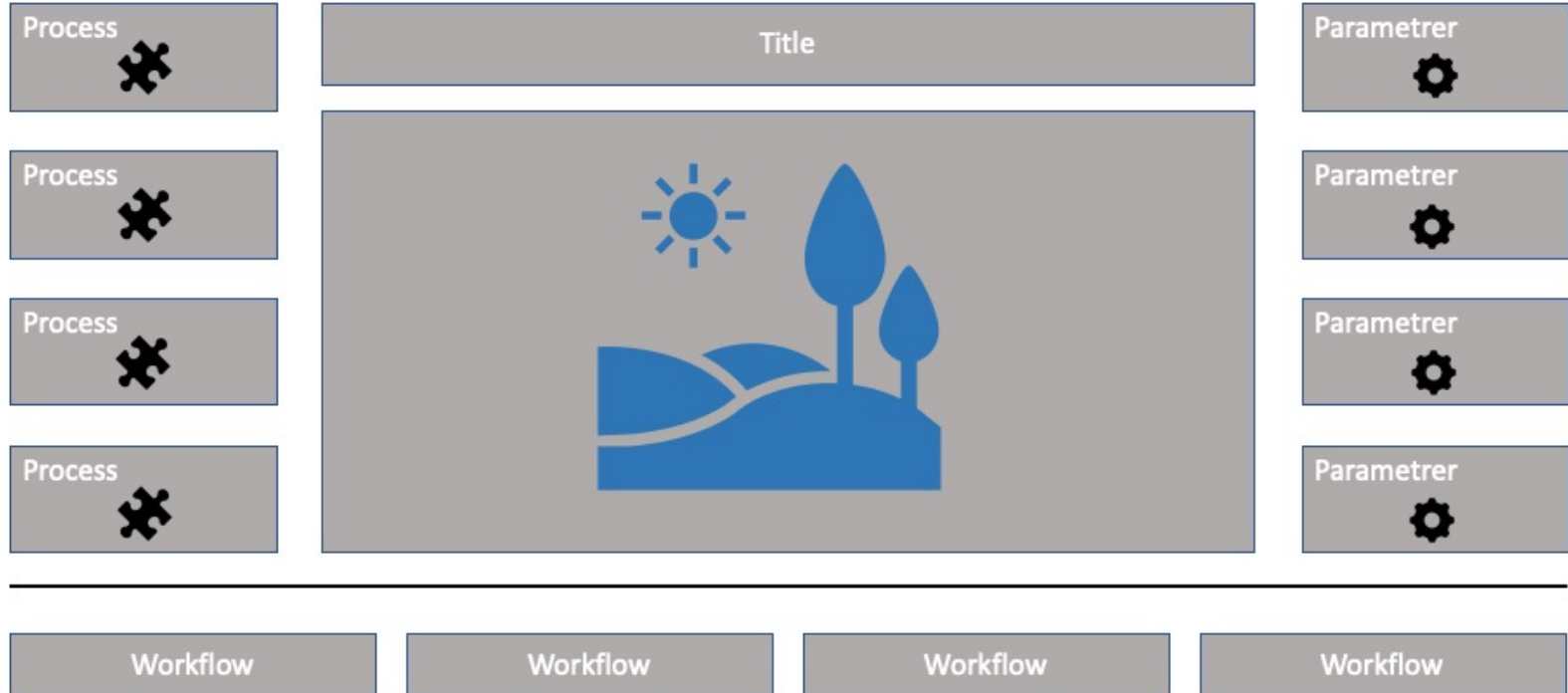
Links to related pages or pages with supporting data

Anything that supports the data in the main grid should be placed here

- Can be drivers and assumptions
  - If the data on this card is too dense for the insights panel, only use the title card
- Visual card

Clicking a card in the panel will bring it into the main data area as a secondary item

# Recommendations – Page d'accueil



Fiabilisation des données >



Cotisations >



Prestations >



Compte de Résultat >



# Réalisation des Comptes Clients



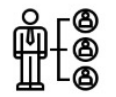
Campagne

## 2018

Paramètres campagne >



Définition des Rôles >



Import des données >



Processus de fiabilisation >



Processus de validation >



Import des données

Terminé

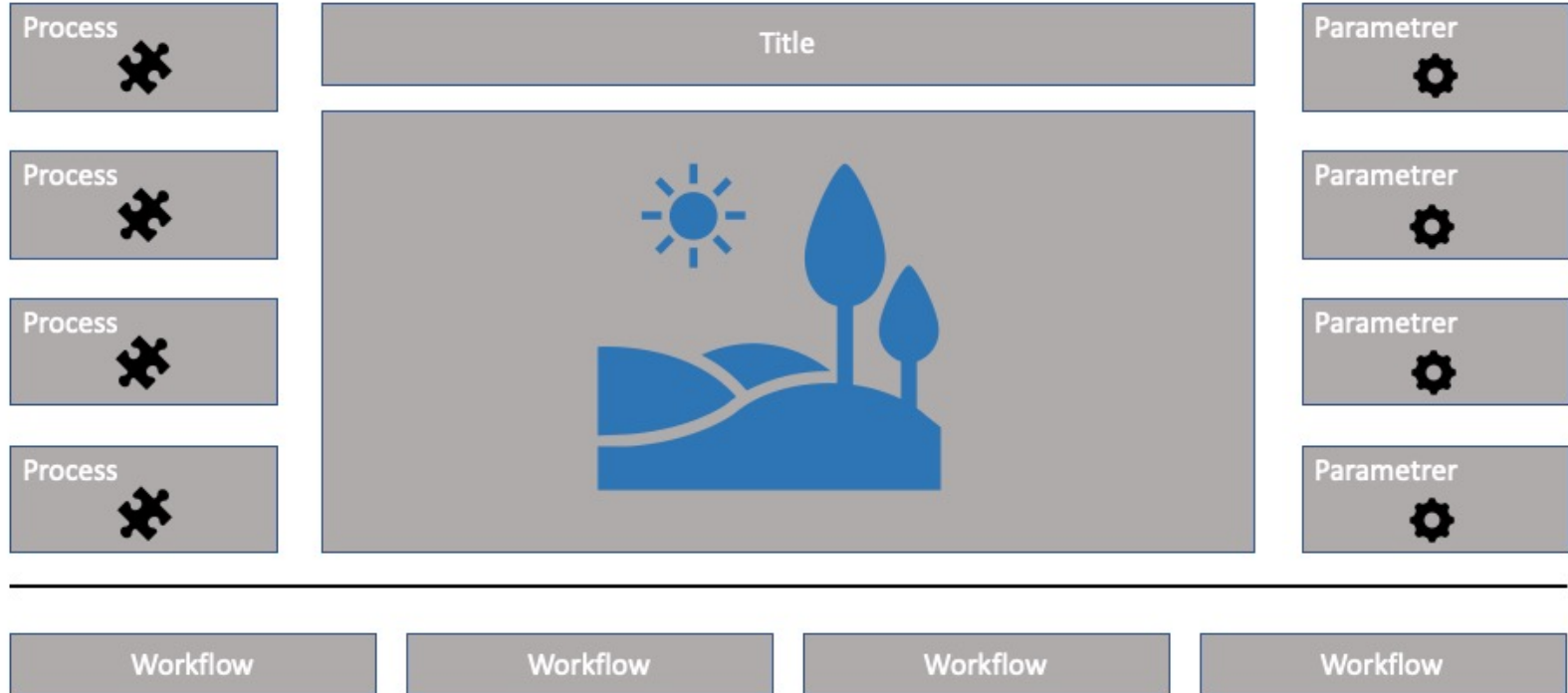
Validation des Comptes clients

En cours








Diffusion

Nous Contacter

# Recommendations – Page d'accueil

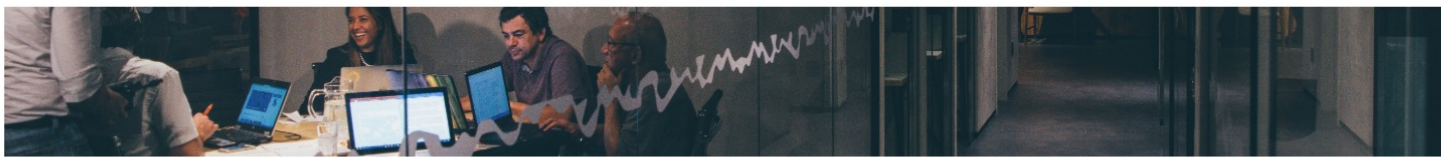


# Recommendations – Page d'accueil

Logo					
Title					
Process 	Process 	Process 	Process 	Process 	Process 
Sub-Process >	Sub-Process >	Sub-Process >	Sub-Process >	Sub-Process >	Sub-Process >
Sub-Process >	Sub-Process >	Sub-Process >	Sub-Process >	Sub-Process >	Sub-Process >
Sub-Process >	Sub-Process >	Sub-Process >	Sub-Process >	Sub-Process >	Sub-Process >
Sub-Process >	Sub-Process >	Sub-Process >	Sub-Process >	Sub-Process >	Sub-Process >



### S&OP



Product Review >

Demand Review >

Supply Review >

Pre-S&OP >

Executive S&OP >

Decisions

04.2 New Product Launch >

05.2 Statistical Forecast Review >

06.2 Inventory Review >

03.6 Scenario Compare >

07.1 Action Items & Decisions >

07.1 Action Items & Decisions >

04.3 Product Rationalization >

05.4 Sales Forecast Review >

06.1 Production Planning >

07.1 Action Items & Decisions >

07.2 Forecast Performance >

07.2 Forecast Performance >

05.5 Customer Forecast Entry >

06.4 Capacity Planning >

05.7 Finance Forecast Review >

03.6 Scenario Compare >

05.3 Marketing Forecast Review >

# Implementation best practices

The U.S.E.R methodology



# U.S.E.R methodology



## Understand

### The value

Identify the personas and key features that can enhance your planning experience

1



## Sketch

### The design

Wireframe the user experience and pages

2



## Execute

### The plan

Build apps and pages after completing the UX training

3

CONTINUOUS  
ITERATION



## Repeat

### The process

Gather, share, and reflect on user feedback, incorporating what you've learned

4

## Resources to get started



### Understand

[Identify the Value for your context](#)



### Sketch

[Follow the Model Design process](#)

[Leverage Front-to-Back design](#)



### Execute

[Take the e-learning](#)

[Follow the Planual](#)

[Follow Best Practices](#)



### Repeat

[Join the UX Research Program](#)

[Keep up with the Releases](#)

## More UX Best Practices

[USER Methodology overview](#)  
[Leveraging Personas](#)  
[UX analogies](#)

[UX Roles Overview](#)

[Top 5 Best Practices](#)  
[MOBILE Best Practices](#)  
[ALM for the UX](#)  
[Forms Best Practices](#)  
[Copy Branch Best Practices](#)

[Use the Dashboard Import Tool](#)

# Anaplan

1 Anaplan User eXperience

2 Management Reporting



4 Questions & Réponses



# Management Reporting - Paramétrage

The screenshot displays the Anaplan Management Report Package interface. At the top, the title bar reads "Management Report Package" with a back arrow, a share icon, and a star icon. Below the title bar, there is a "Zoom" control and "Export as PDF" and "Present" buttons. On the left side, a table of contents lists eight sections: 1. Welcome, 2. Strategic Initiatives, 3. Executive Summary, 4. Cash Flow, 5. Income Statement, 6. Cost Center Variance, 7. Balance Sheet, and 8. Insights Analysis. The main content area shows the cover page of the report, which features the Anaplan logo in the top right corner. The title "MONTHLY MANAGEMENT REPORT 2021" is centered on the page. The background of the cover page is a dark, abstract design with a network of white and yellow lines and nodes, resembling a data tree or a complex network diagram.

