Anaplan Live!

Evolve You Anaplan Ecosystem with Enterprise Governance

Anaplan Live 2022 – San Jose, CA

Agenda

01 Introduction

02 COE Framework

03 Model Governance

04 Workspace Architecture

05 Break

06 Data Hub & Data Integration

07 Security & Access

08 Build and Manage

09 COE Maturity

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Introduction

Speakers

Kyle Welling

Director, Operational Excellence Group

Anaplan

Ryan Kohn

Platform Adoption Specialist

Anaplan

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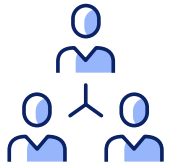
Rules of engagement

Take risks and be vulnerable



Be in the moment

Interact

Go to **slido.com** with # **3920013**

– Q&A

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What does enterprise governance mean to you?

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What does enterprise governance mean to us?

1. COE Framework
2. Model governance
3. Workspace architecture
4. Data Hub / Data Integration
5. Security
6. Building & Management
7. COE Maturity

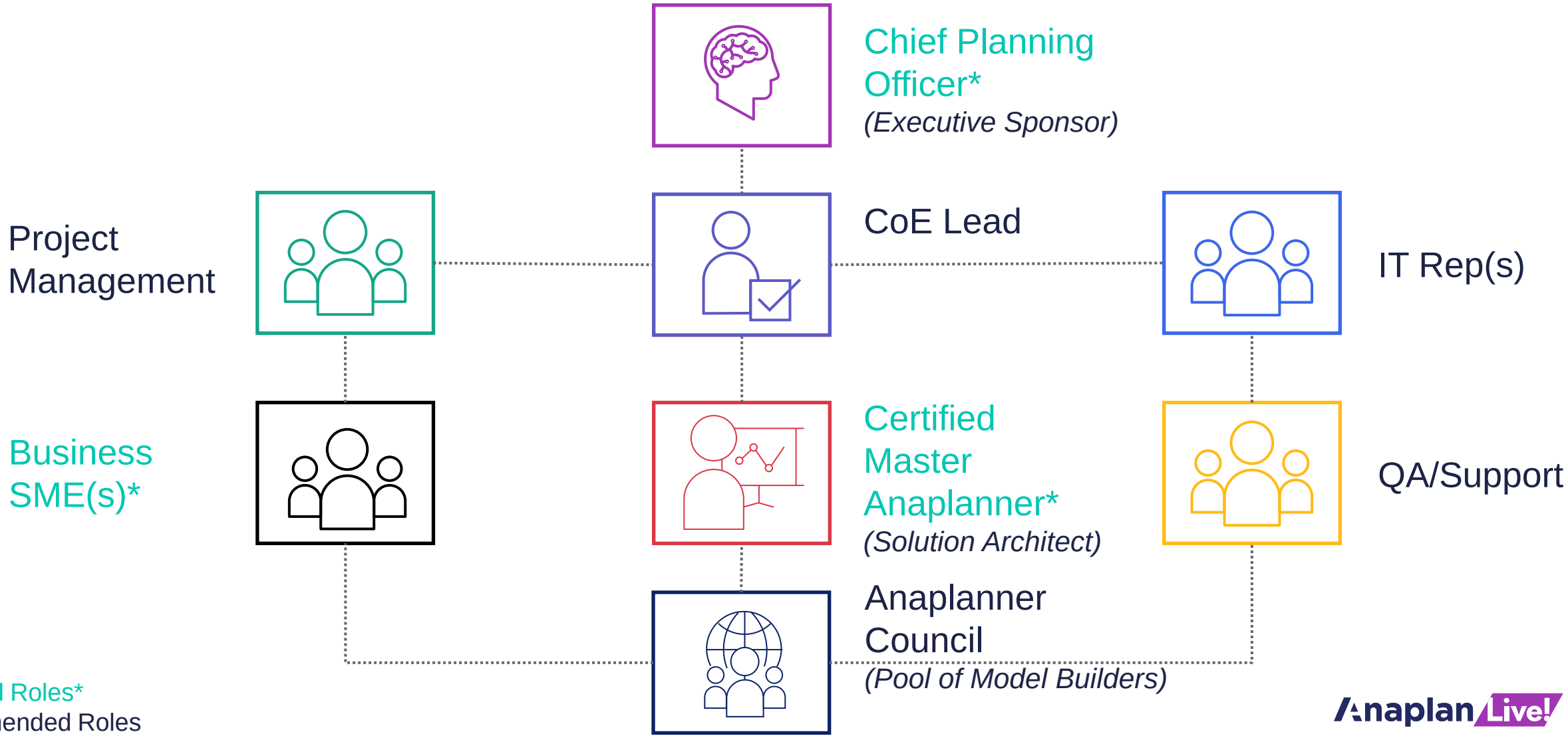
1. COE Framework

Individual Activity

- Picture yourself as the sole person responsible for Anaplan across your entire organization. Write down the top 5 things you need to focus on to be successful in your job.

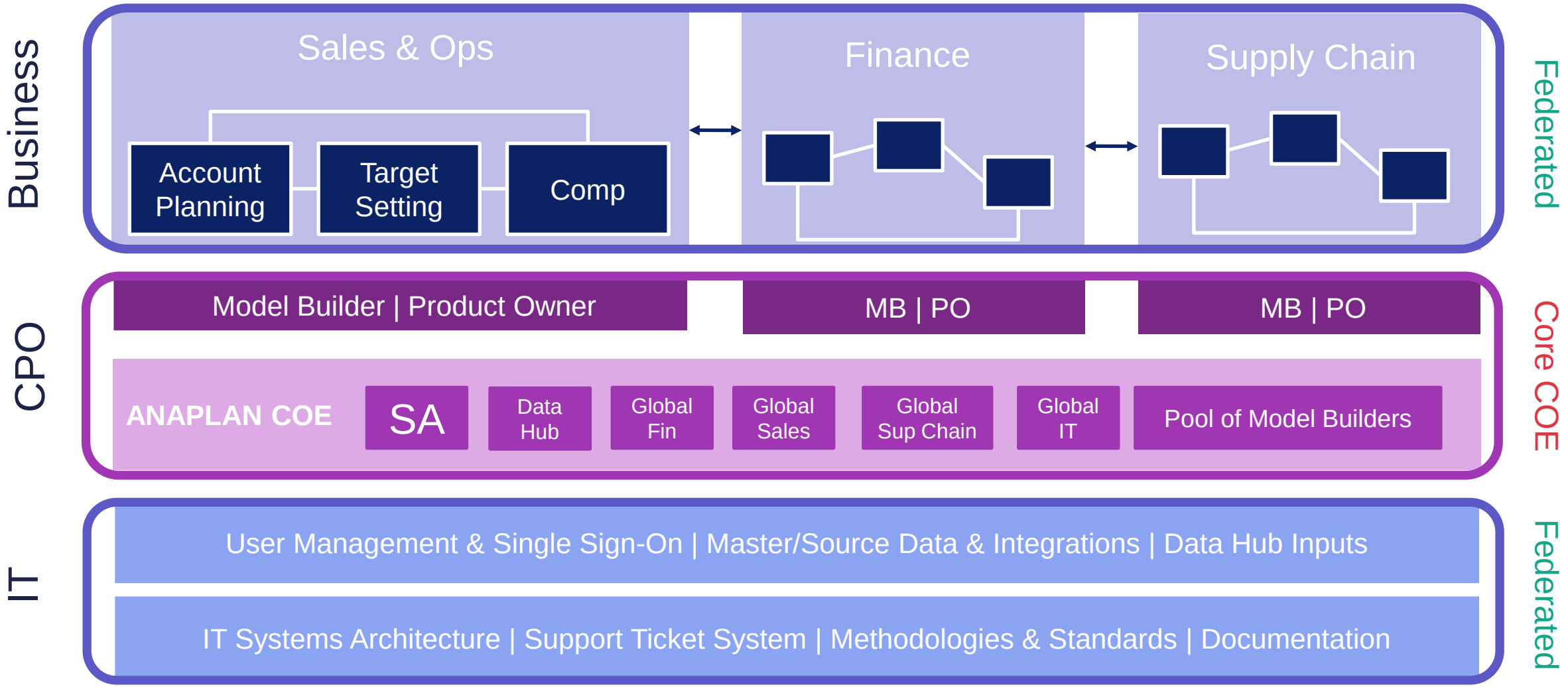
A team that **Promotes, Shares, and Collaborates** on a specific technical focus area, to efficiently and effectively **Achieve Business Objectives**, with the goals of maximizing **ROI**, standardizing around **Best Practices**, and facilitating **Shared Knowledge**

Connected people are the backbone of successful CoEs



Required Roles*
Recommended Roles

Regardless of location, CoE success is often defined by proximity to the business



Core responsibilities of maintaining and expanding Anaplan

Support

To support and delight end users

- Service Strategy
- SLA Performance
- **Request Mgmt**
- Metering & Charge Back
- **User Mgmt**
- Incident intake
- Service Catalog
- Ad hoc requests
- Defect resolution

Training

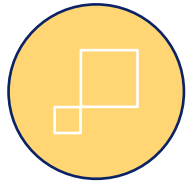
To enable and unlock potential

- Basic platform training
- Use case business process
- **Model builder enablement**
- New feature release training
- **Planning best practices**

Adoption

To monitor and ensure usage

- **Performance Reporting**
- User Satisfaction
- Capacity Management
- **Maintenance & Monitoring**
- **Data Mgmt**
- Operational Reporting



Expansion

To connect business plans

- Innovation & Idea Incubation
- Request Intake
- **Prioritization**
- Estimation
- **Change Controls**
- Quick Wins
- Proof of Concepts
- Enhance/expand use cases

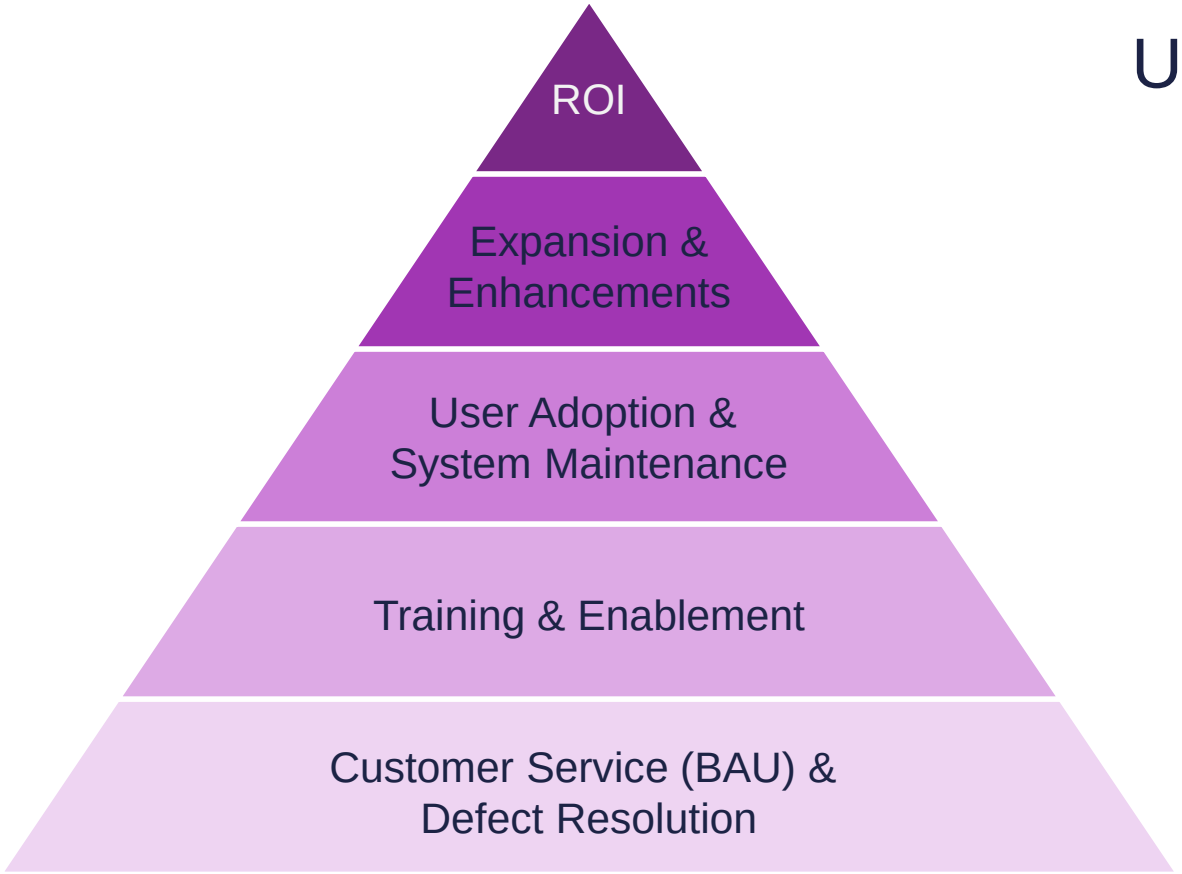
Value

To measure and share benefits

- Business Insight
- Value Realization
- ROI calculation
- Cost optimization
- Justify additional spend
- Improvement opportunities
- Identify under-achievement

CoEs emphasize change management to ensure frictionless production experiences

Value Added to Business



Urgency Priority to Business

Hierarchy of CoE Production Support Functions

Start by prioritizing your CoE components

Skills & Expertise

- Functional Subject Matter Experts (SMEs)
- Solution design & architecting skills
- Technical model building skills
- Project management capabilities

Access to Support

- Internal Support for both technical & application [use case] help for business
- Builds internal knowledge base for users & model builders
- 24/7 Customer Support desk

An Implementation Approach

- A known and understood approach to delivering and evolving solutions with Anaplan
- Use Agile Development Methodology
- Big Bang vs. Initial Pilot and phased Roll-out

Change Management

- Embedded within the Business
- Functional-specific training
- Clear and appropriate Communications to drive and support user adoption
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Master Anaplanner – Anaplan 'Savvy'

- Go-to in house Anaplan expert, while still business-oriented
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Access to Knowledge and Best Practices

- Functional Use Case Best Practices
- Technical Model Building Best Practices
- Leveraging internal Anaplan community
- Sharing and pooling practical knowledge
- On-demand eLearning or classroom

Direction and Governance

- A Governance framework to steer and prioritize the Anaplan roadmap and drive ROI
- Identified Steering Committee
- Identified Exec Sponsors and Sign-off approach
- Office of the PMO

Data Governance and Integration

- Utilization of the 'Data Hub' concept
- Single source of the truth
- Maintain control and quality of central master/meta data
- Provide consistent integration with enterprise warehouses and transaction systems

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Alternative Names for CoE

Additional Names
Shared Services Center
Captive Center
Global Business Services
Multifunctional Shared Services
Global Insourced Center
Global Shared Services Organization
Global Competency Center

Additional Names
Planning Command Center
Shared Business Operations
Business Operations Optimization
Central Planning Team
Planning/Anaplan Committee
Business Enablement Team
Community of Practice
Decision Acceleration Group

2. Model Governance/Best Practices

Standardize Your Anaplan Environment

- The Planual
- PLANS
- DISCO
- Naming Conventions

Modeling Principles – “The way we model”

- **Performance:** Use the correct structures and formulae to optimize the Hyperblock
- **Logical:** Build the models and formulae more logically. Avoid subsidiary views
- **Auditable:** Break up modules and formulae for better understanding, performance and maintainability.
- **Necessary:** Don’t duplicate expressions, store & calculate once reference many times, no unnecessary calculations, summaries off by default
- **Sustainable:** Build with the future in mind, think about process cycles and updates. Avoid hard coding

Why Build This Way?

- **Performance**
  - Fewer repeated calculations
  - Optimized structures and formulas
- **Logical**
  - Data and calculations reside in logical places
  - Model data flows can be easily understood
- **Auditable**
  - Model structure can be easily understood
  - Simplified formulae (no need for complex expressions)
- **Necessary**
  - Formulas and structures are not repeated
  - Stored and calculated once, referenced many times
- **Sustainable**
  - Models can be adapted and maintained more easily
  - Expansion and scaling simplified

Principles of Module Design - DISCO

Data

- **Data**
  - Transaction / Source data
  - Data Hub

Inputs

- **Inputs**
  - Design for user entry
  - Don’t mix calculations and outputs

System

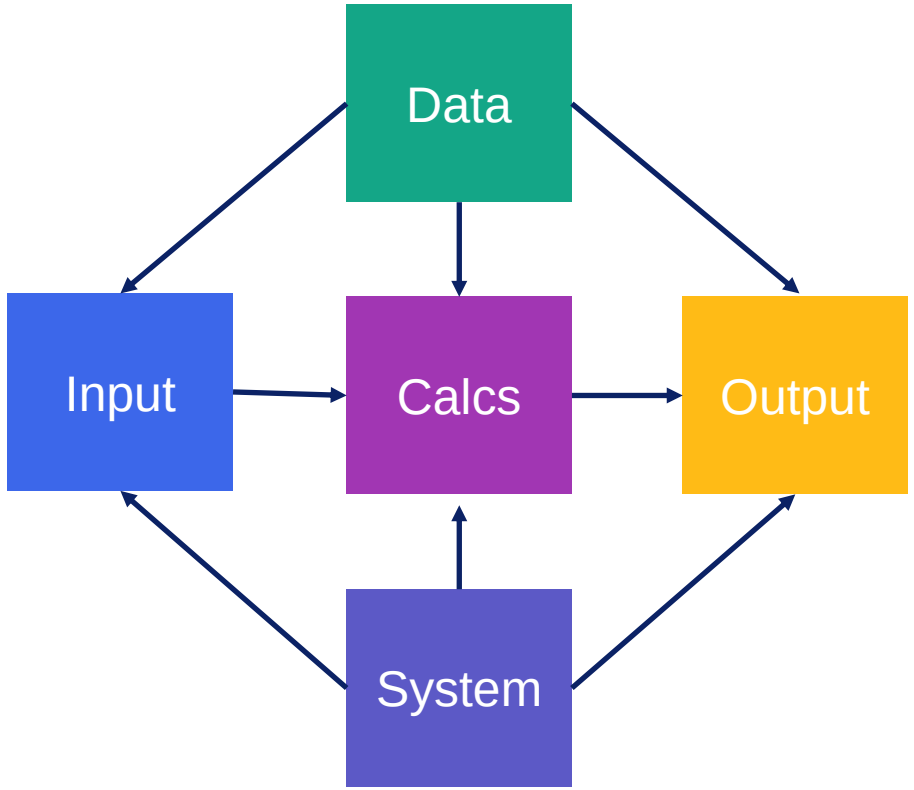
- **System**
  - Time Management
  - Mappings / Technical modules

Calc

- **Calculations**
  - Optimize for performance
  - Group Like calculation structures together

Outputs

- **Outputs**
  - Reports
  - Only data flow in



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 have learned

4

Other Considerations

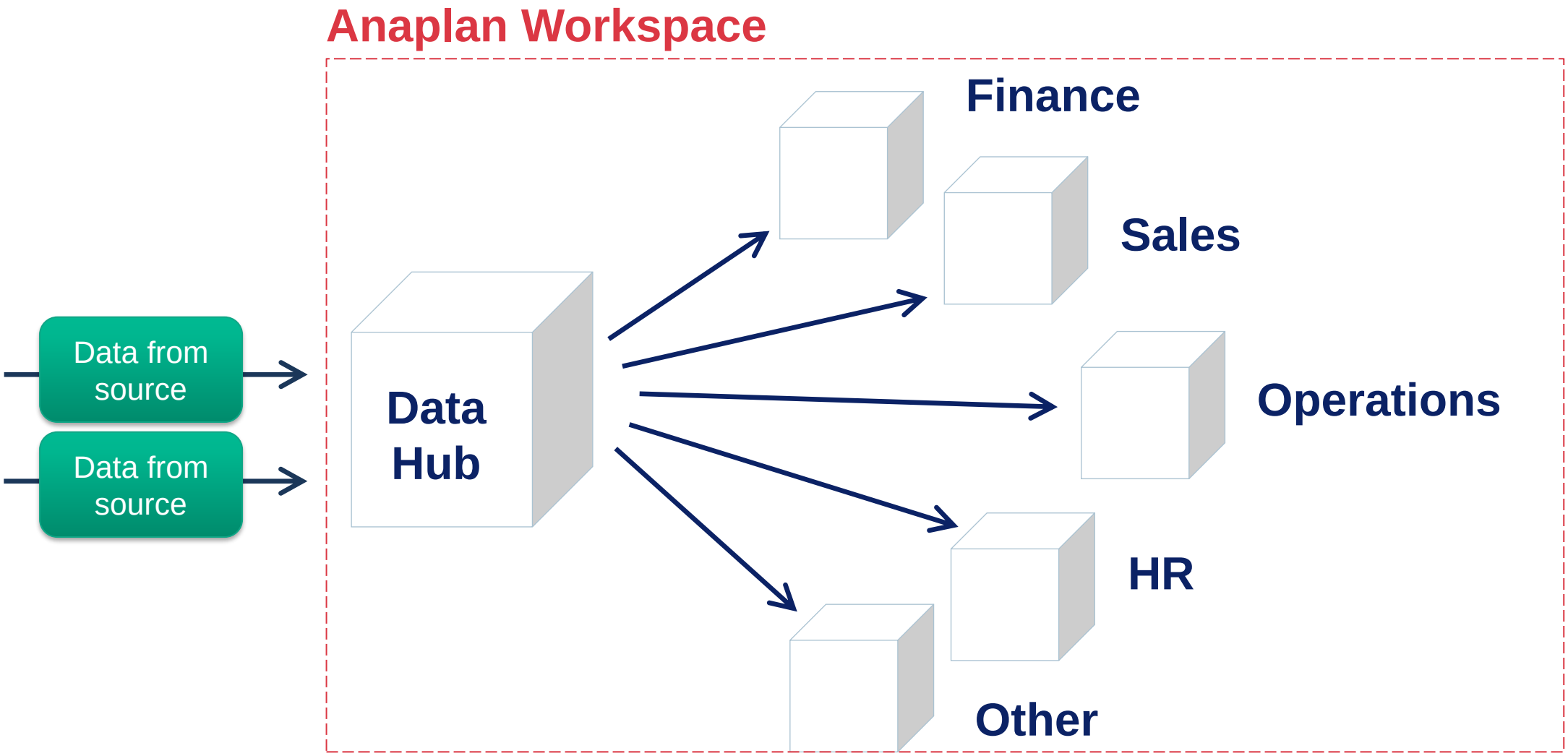
- Standardization
- Naming Conventions
  - Helps model builders consistently structure models
  - Reduces ramp for new MBs
  - Simplifies triage
  - Naming convention standards

Other Considerations – Performance Testing & Review

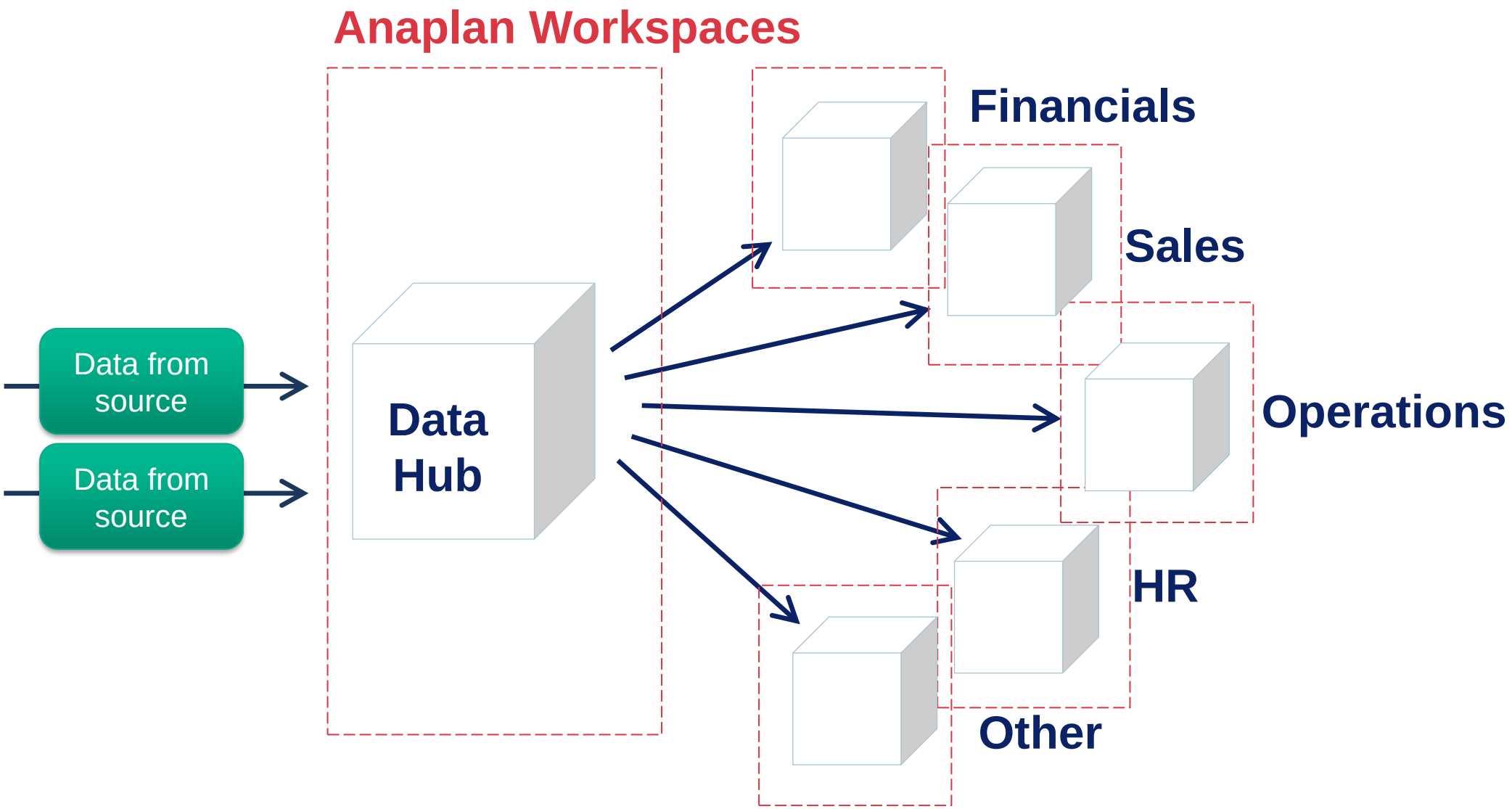
- **Model Open Analysis**
  - Available via Anaplan Support
  - Highlights line items that take longest to calculate
- **Model Concurrency Testing**
  - Service provided by Anaplan
  - Simulate the expected real world concurrent user interaction with an Anaplan model
  - Identify model bottlenecks and avoid post go-live performance issues
  - What's required:
    - Total # of users; roles
    - Anticipated number of concurrent users
    - Detailed user journeys
    - Sanitized model
- **Model Optimization Recommendations**
  - Service provided by Anaplan
  - Focus on specific areas of poor performance and recommendations to improve

3. Workspace Architecture

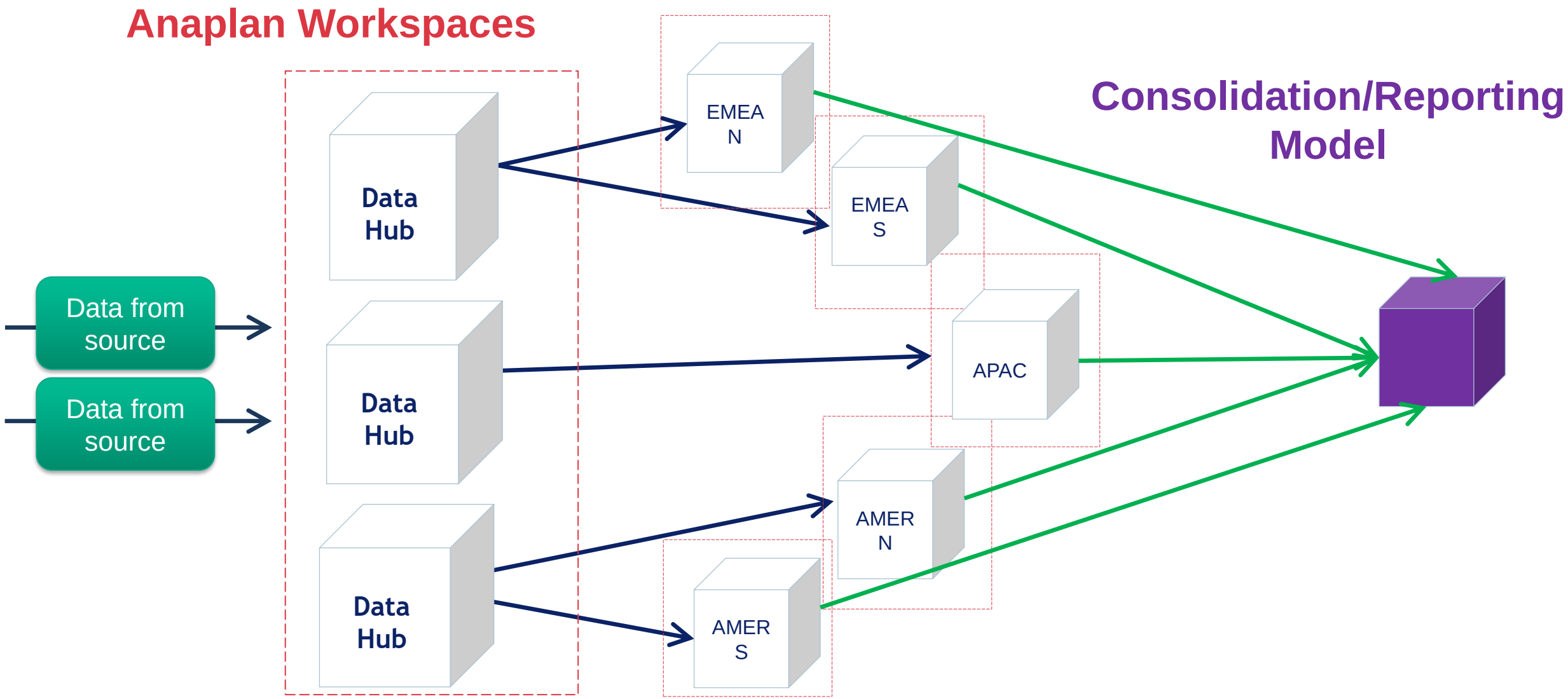
Consolidating Data Hub



Best Practice



Multiple Models and Consolidation



BREAK!

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4. Data Hubs & Data Integration

Why do you need a Data Hub?

Maintainability

Data Transformation

Performance

Why do you need a Data Hub?

- Single source of truth to all spoke models
- Data Validation
- Performance
- Who owns the source system?
- ETL Tool
- Request IT to *only* give you the data you need
- Granularity
- Transactional Lists

https://community.anaplan.com/t5/Best-Practices/Data-hubs-purpose-and-peak-performance/ta-p/48866

Impact of having date as part of the key?

- 2 years of data by month (POC data, so realistic)
- 3 elements make up uniqueness
- 80% sparse

- Model 1 includes the month in the key, data in a transactional module

- Model 2 doesn't, and the data is brought into a module dimensioned by month

	Model 1	Model 2	
Import Time (seconds)	95	106	11.6%
Model Open (seconds)	30.9	1.6	(94.8%)
Transaction IDs (k)	7284	288	(96.0%)
Model Size (Gb)	4.5	1.0	(77.8%)
Module Cell Count (Ms)			
Transaction Details	50.99	1.14	
Transaction Data	-	5.48	
Data Summary	121.89	121.89	
	172.88	128.51	(25.7%)

Impact of having date as part of the key?

- 4 years of data
- 3 different transactional lists

- Original model
  - Numbered list, with Text values as Properties with all properties using the Combination of Properties to make the record unique
- Updated model
  - Unique code, no List Properties, Transactional module, Properties module

	# of Records		
	Original	After	% Reduction
List 1	168,198	636	99.6%
List 2	110,941	6,170	94%
List 3	119,242	32,036	73%
Total Model Size (mb)	607	43.9	93%
Total cells (milion)	56	3.1	94%
Model Open Time	1.193	0.667	44%
Memory Size (GB)	0.71	0.05	93%
String References	6,831,739	257,010	96%

Lists

- Make the code or member unique
- Use Properties ONLY for Display Name, Dependent Dropdowns, and Exports

- Do NOT use transactional data or Date Periods to make the record unique
- Do NOT use Row Count
- Do NOT have Properties defined on a transactional list

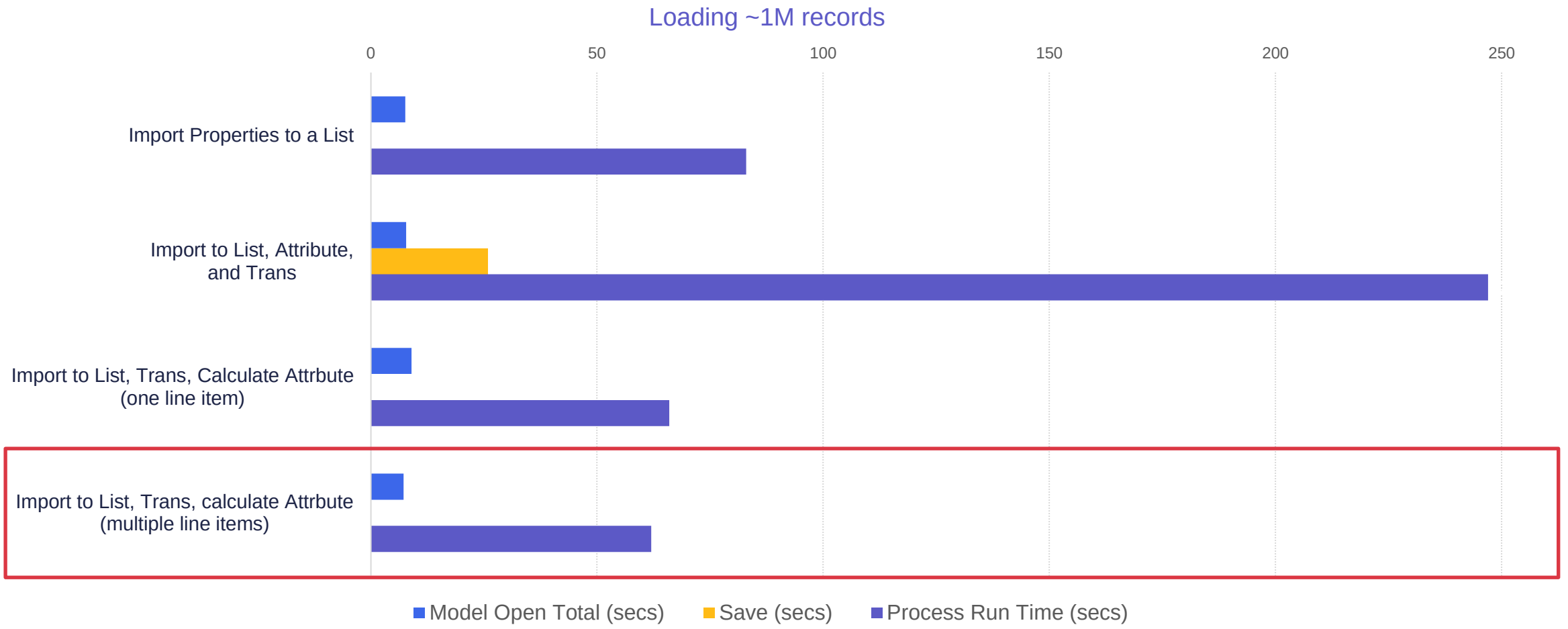
Loading Data: Examples

1. Import to List Properties — Not Recommended

2. Import to Module Attributes

- Calculate Attributes
    3. One line item
    4. Multiple line items

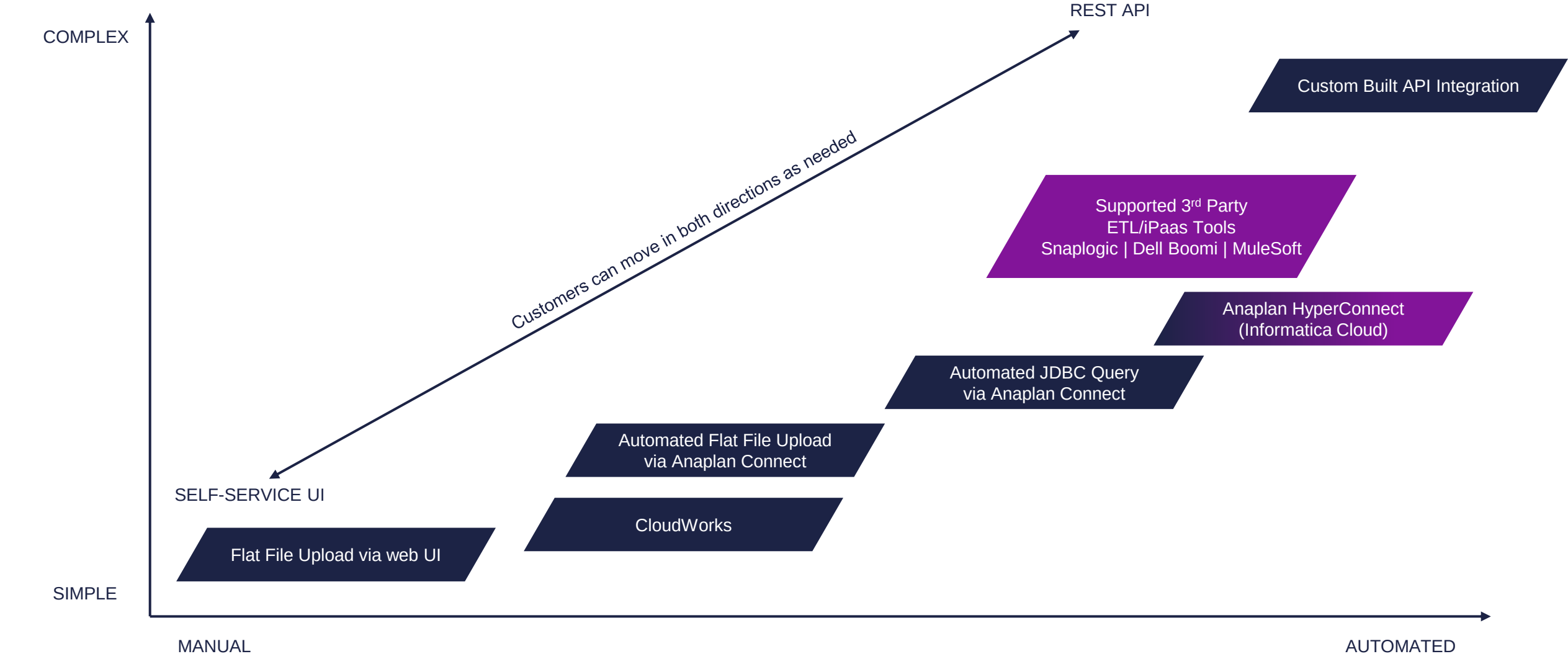
Loading Data: Performances



Exports

- **Always export from a saved view**
  - Use only one filter condition
  - Only export detailed information, no parent data
  - When exporting from a numbered list, export the code!
  - Export Text line items in the Data Hub as list-formatted line items in the Spoke
- **Only export what you need**
  - No need to export data that has already been exported
  - Leverage the current period function to only export the current period data
  - Use Delta loads

Choosing an integration option



Anaplan Official Product

Third Party Tool

1. How do you handle automated data integration today?

2. What do you want to change?

5. Security & Access

What is Access Control?

Role-based Access

- Restrict access to certain resources based on your role

Assign Roles

- Assign users to roles in both the UI and programmatically in the future

Protect your Resources

- Determine if a user is authorized to access a certain resource via a full authorization system

Note: You need to be assigned a role to grant the user access to resources (i.e. "least access")

Available in the Administration UI

Roles in Access Control

Current Roles

Tenant Admin

- Manage configurations for the tenant
- No access to model data

View Admin

- View tenant configurations
- No access to model data

Tenant Auditor

- Access audit logs for a tenant

Page Builder

- Configure pages and applications

User Access Management – Best Practices

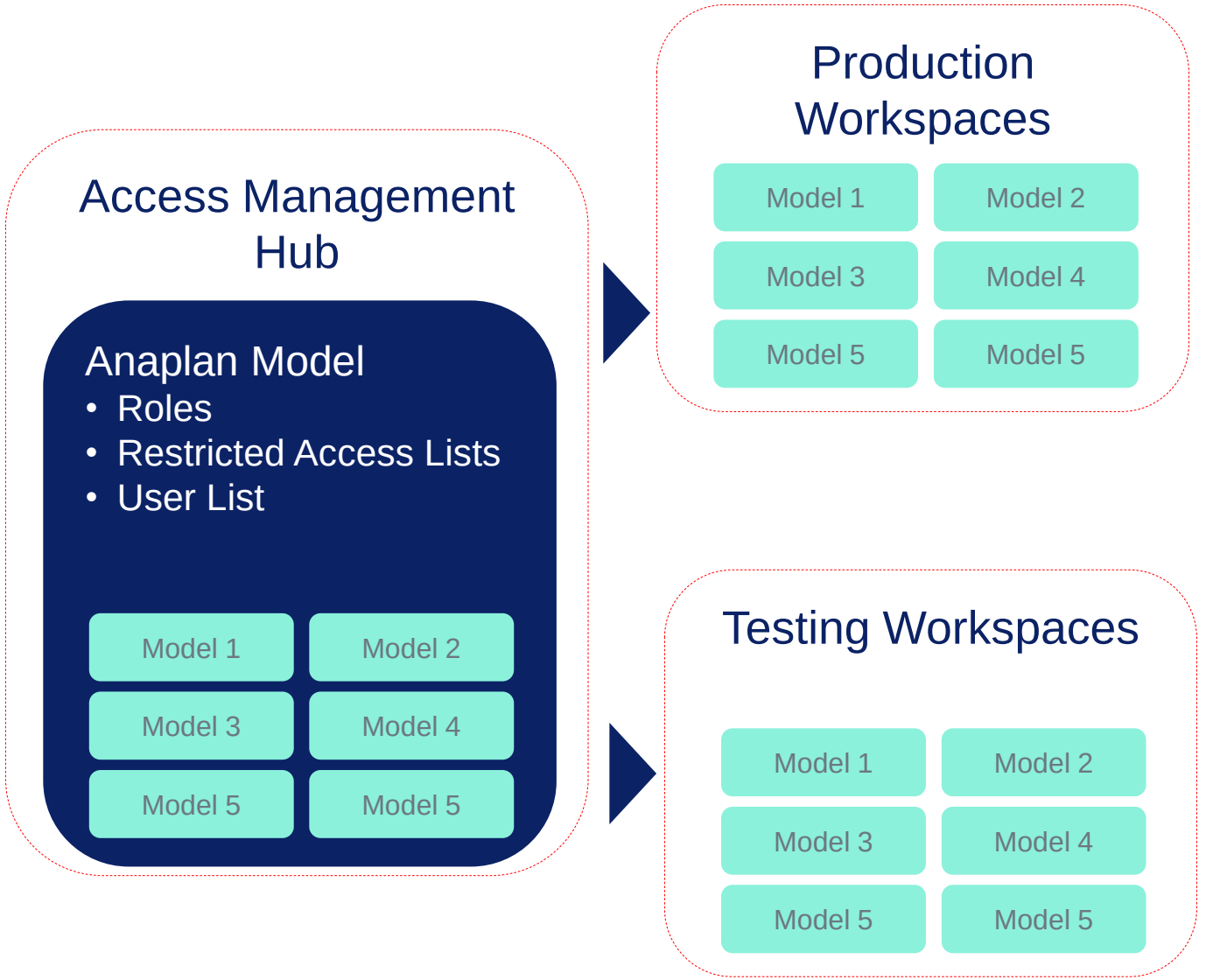
SSO Enabled

IT/COE/Support Admins
- Update user security info

Business
Non-workspace Admins
- Update user security info

Enterprise Access Management
System Uploads
- User IDs
- Model Association
- Roles
- 24 hours Minimum
- Mirror Access

Active Directory
System Uploads
- Inactive accounts feed runs every 2 hours



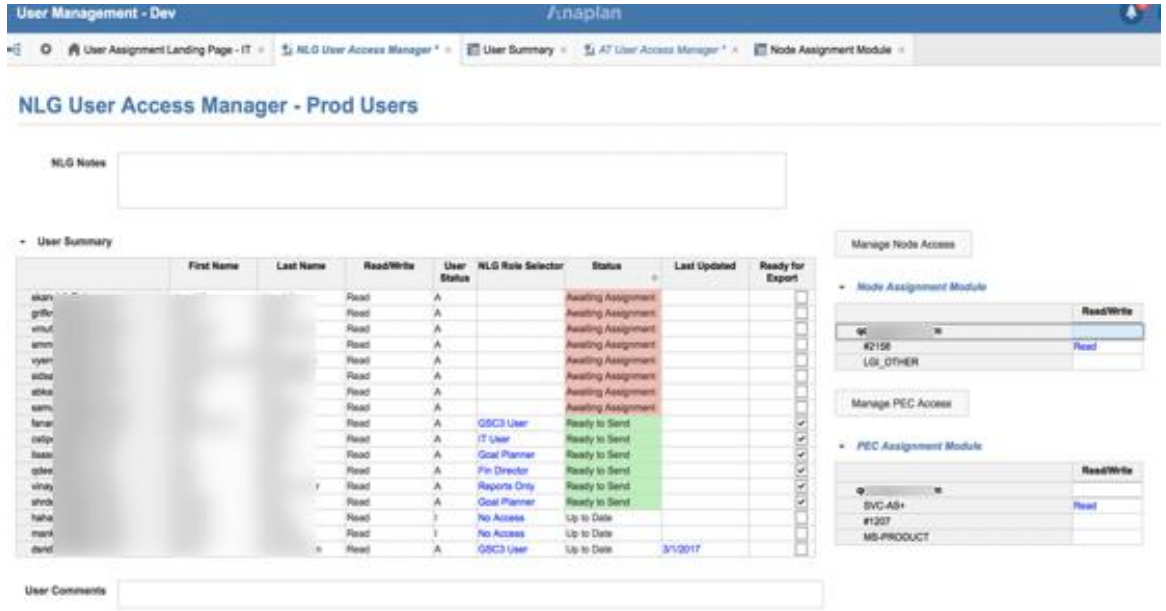
IT/COE/Support Workspace Admin

- Model Offline
- Lock Model
- Copy and Archive
- Manually trigger security updates
- Maintenance of Security Model

User Access Management – Anaplan Model

Benefits

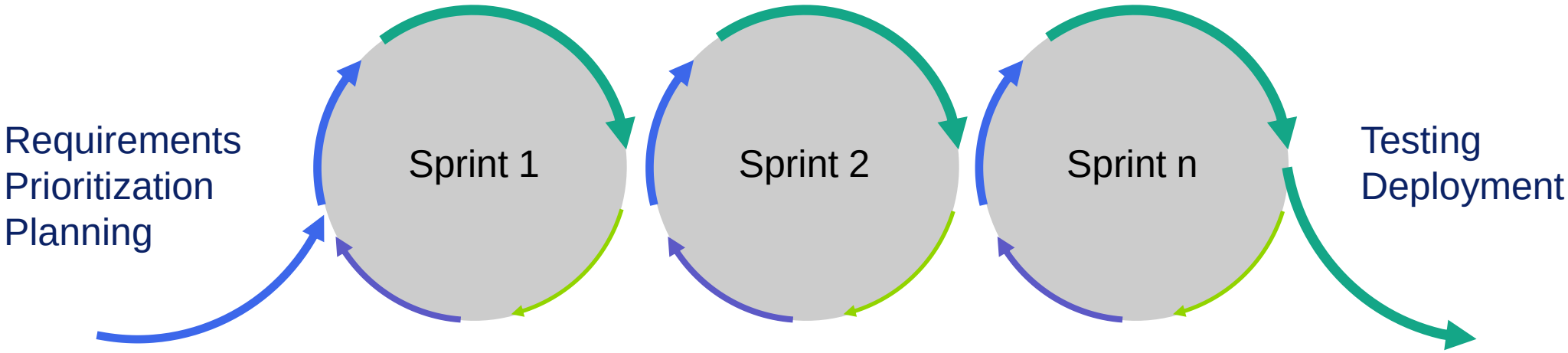
- Product Owners (Application owners) control the access
  - ✓ No need to wait for IT support
- Access control updated every 12 hours
- Product owners can perform ad-hoc access request
- Product owners can remove access (no access) for users with one click
- Bulk upload option available with IT resource support
- User count reports
- Integrated with Internal User Management system that will trigger Inactive accounts



6. Build & Management

Agile implementation methodology

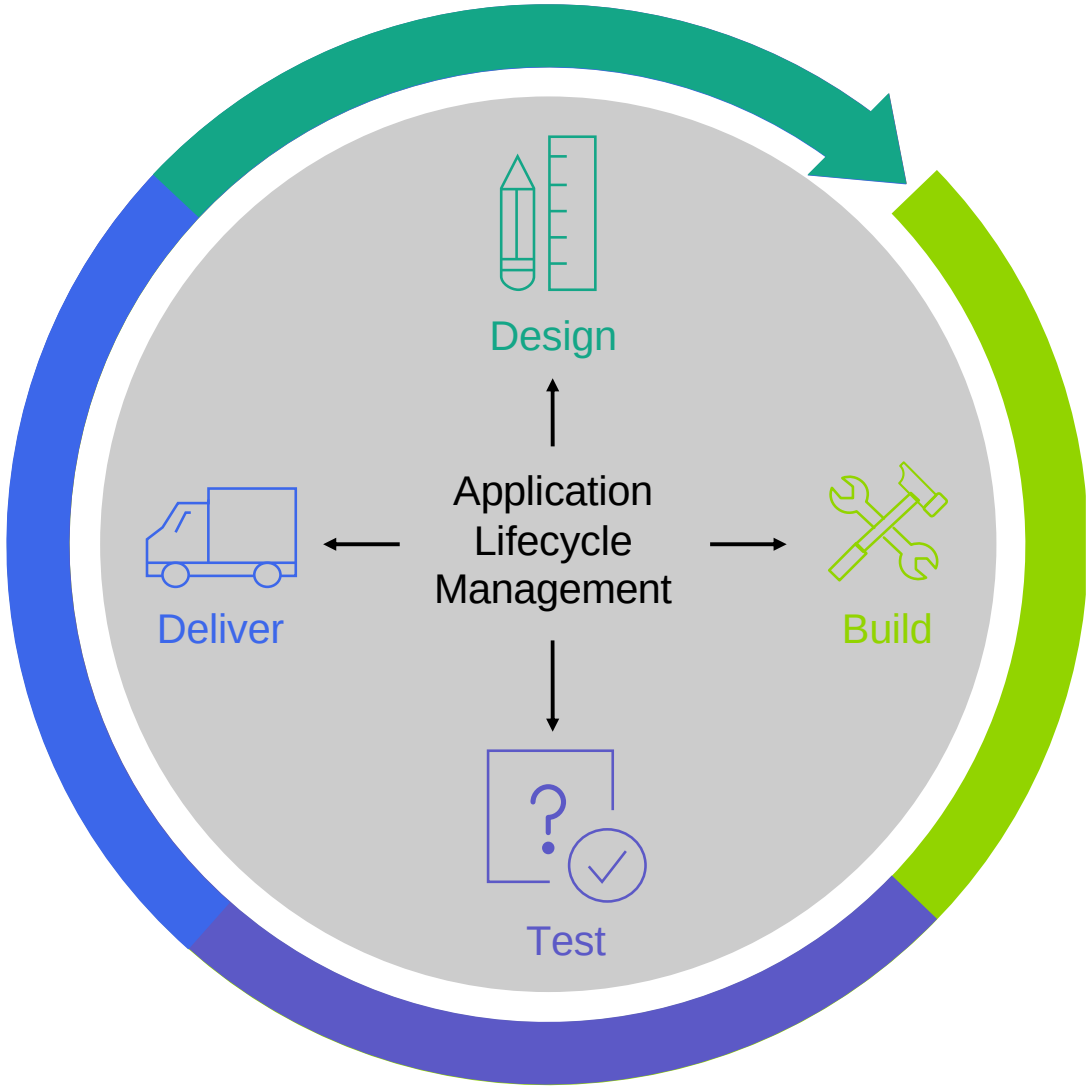
Anaplan Way



Collaboration. Iteration. Faster ROI.

Application Lifecycle Management

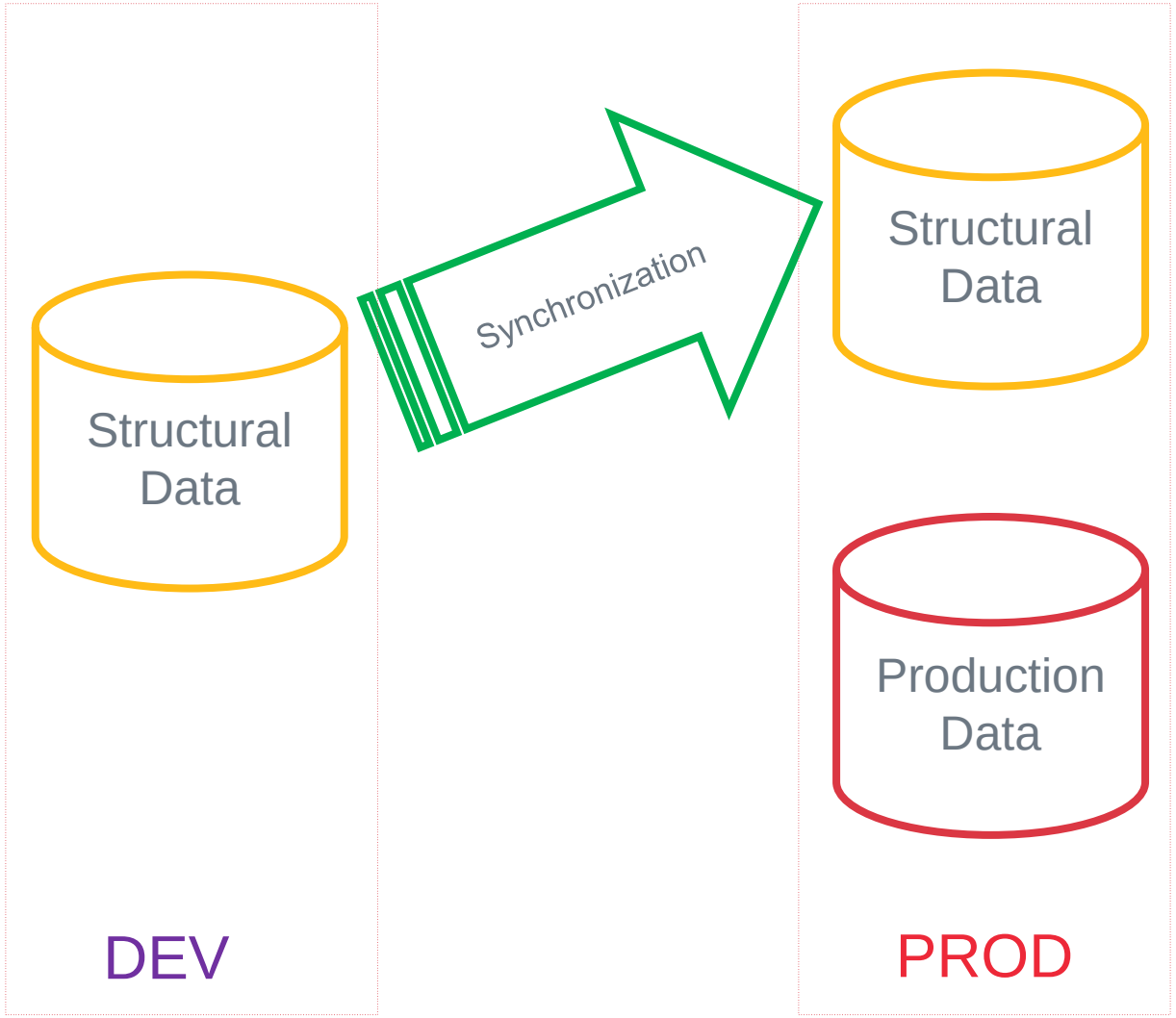
Manage changes efficiently



Structural vs Production Data

Structural Information

consists of a model's configuration settings and lists (with the exception of production lists). Structural information can't be edited when a model is in deployed mode. Changes that affect a model's structural information are known as structural changes. When a model is synchronized, only structural changes are included



Production Data

is operational data that changes often during day-to-day business operations. It includes the values of cells in modules and certain administrative tasks such as managing production users

Vocabulary

- Structural Data
  - Dashboards, Modules, Line items, Lists not intended to be updated by users
- Production Data
  - Lists and data that can be updated by users
- Deployed Mode
  - Locked down, no changes to Structural data permitted
    - **Golden Rule 1:** Once in Deployed mode, never take it out
- Synchronize
  - The process of pushing structural changes from the Development model to Production models, Data **never** moves
- Revision Tags
  - Sets of changes in the Development model that can by synchronized
- Compatibility
  - Models that are able to synchronize from one another
    - **Golden rule 2:** The last revision tag the Target model **must** exist
    - In the Source

Preparing for Application Lifecycle Management Deployment

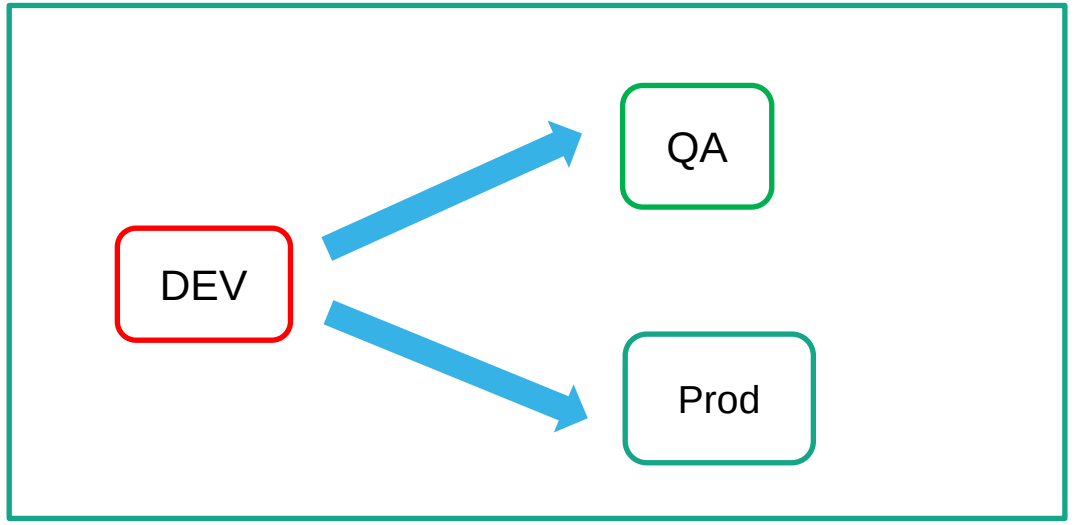
Architecture Best Practice

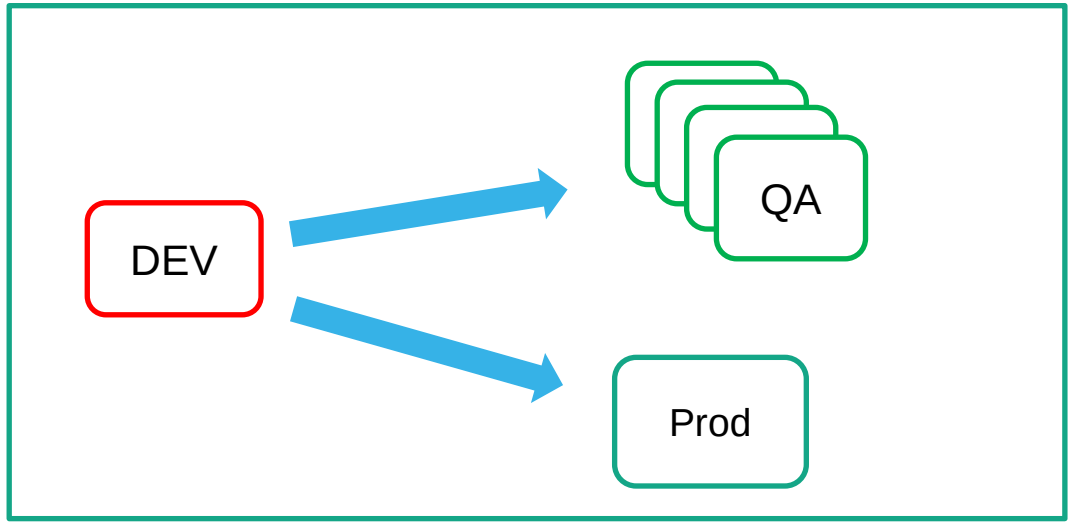
Best Practice

- **Dev →Test or QA**
- **Dev →Prod**

Why?

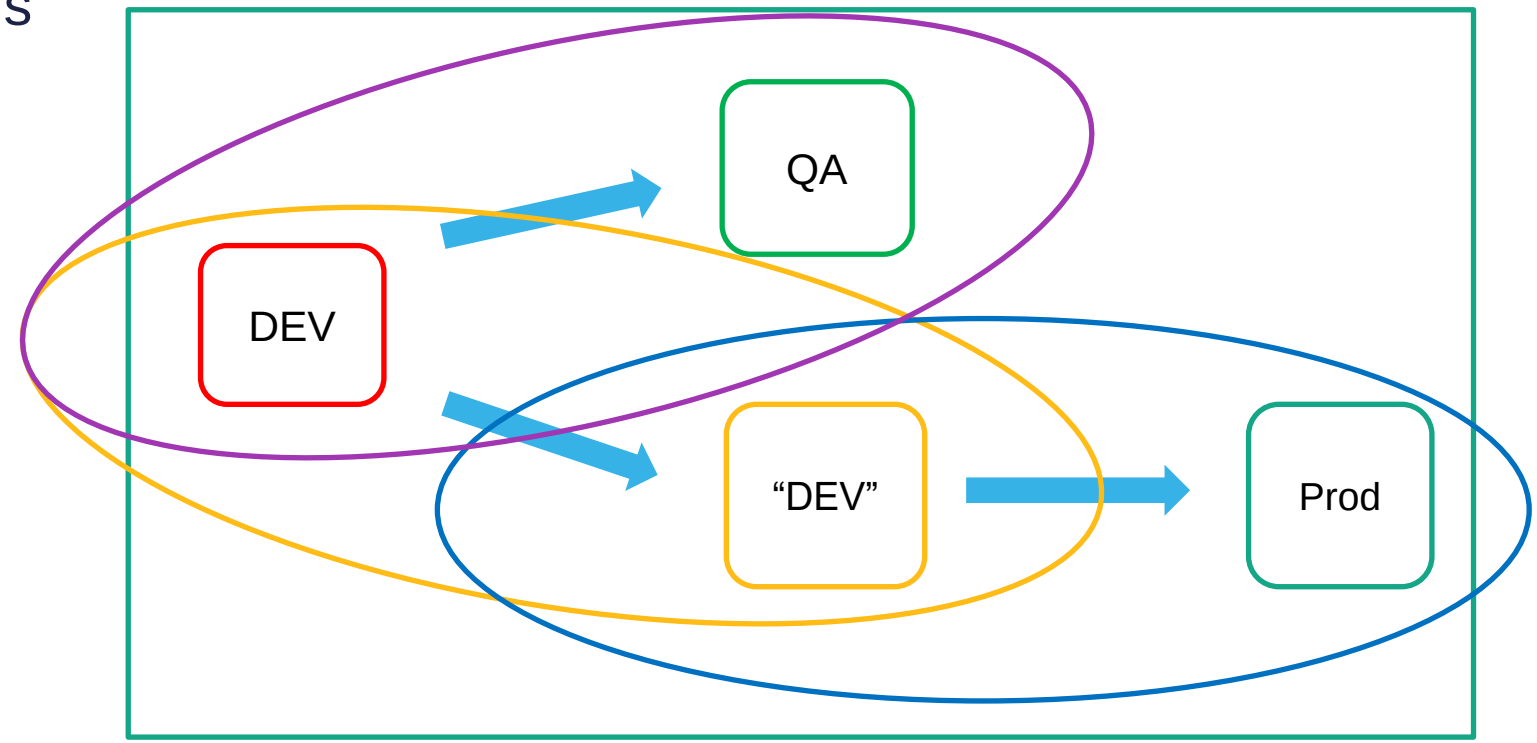
- Dev always remains single source
- No chance of “accidental” sync
- Can create multiple Test models at different revisions
- Allows Test models to be deleted





Architecture Options

- Segregation of Duties
- If you need to keep business admins separate from developers



Developers

Testers

Production Admins

Prior to Deployment 1/3

Create a structure for change

- Establish Central Responsibilities
- Establish Functional Representatives in Business
- Designate a Central Solutions Architect
- Establish a Process for Changing / Creating a New Model
- Consider segregation of duties for Dev and Prod models/workspaces

Prior to Deployment 2/3

Create a Change Control Process

- Establish process for collecting change requests
- Development team clarifies requirements with Business
- Calculate development estimates
- Define a “triage” process to prioritize developments
- Refer to “Product Owner” for approval
- Agree development / sprint plan
- Define a communication plan to the Business

Prior to Deployment 3/3

Cleanse existing models

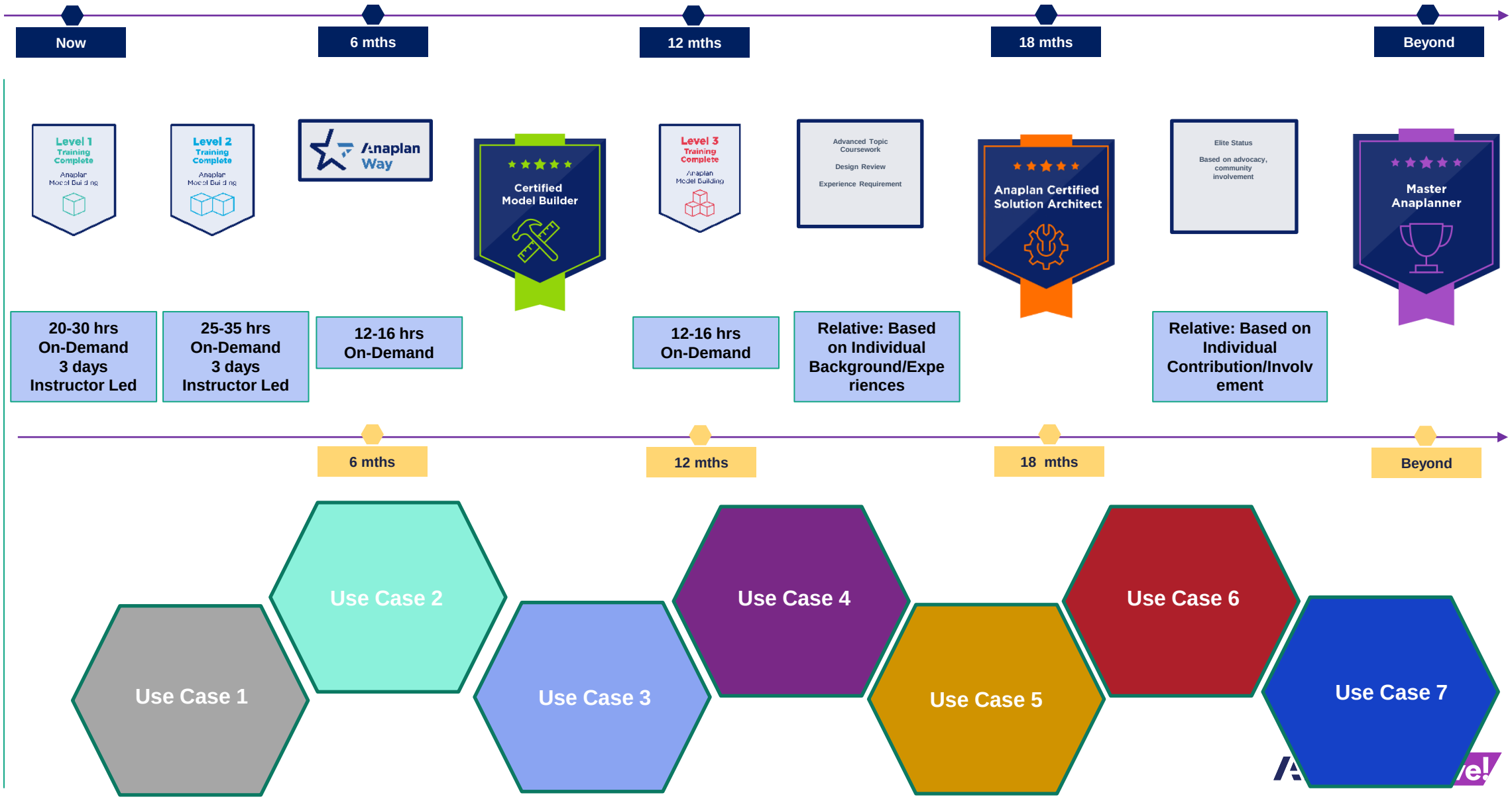
- Imports and data sources
  - Add required imports into processes
  - Rename imports if necessary
  - Delete old imports and data sources
- Production lists
  - Decide which lists will be production lists
  - Check for formulae reference protection on production lists
- Model tidy
  - Delete redundant modules, lists & dashboards
  - Rename modules and lists if necessary

7. COE Maturity

Training & Enablement

Master Anaplanner Learning Path

Creating a Talent Profile



Recommended Training

Level	Anaplan Training	New To Anaplan	Business Owner	Model Builder	Model User
Beginner	Register: Anaplan Community (1 min) - required for accessing all training				
Beginner	Request access to Anaplan - required to access Anaplan				
Beginner	101: Anaplan foundations (30 mins) - who and what is Anaplan, roles				
Beginner	Anaplan essentials for customers (3 hrs) - history, value, pitches and product				
Beginner	Learn to speak Anaplan (5 mins) - get familiar with key terminology				
Beginner	Essentials of model building (4 hrs) - explore models as end user and as a builder				
Beginner	New user experience (UX) training (1.5 hrs) - learn new UI features				
Intermediate	The Anaplan way (20 hrs) - live course covering agile project management for Anaplan				
Intermediate	Level 1 model building (25 hrs) - create new models, import data				
Intermediate	Anaplan dashboard design (350) (60 min.) - Best practices for dashboard design				
Advanced	Level 2 model building (40 hrs) - advanced model building skills				
Advanced	Guided project (varies) - real world modeling project				
Advanced	Level 3 model building (varies) - data integration, data hub, roles				

Required | Highly recommended | Recommended

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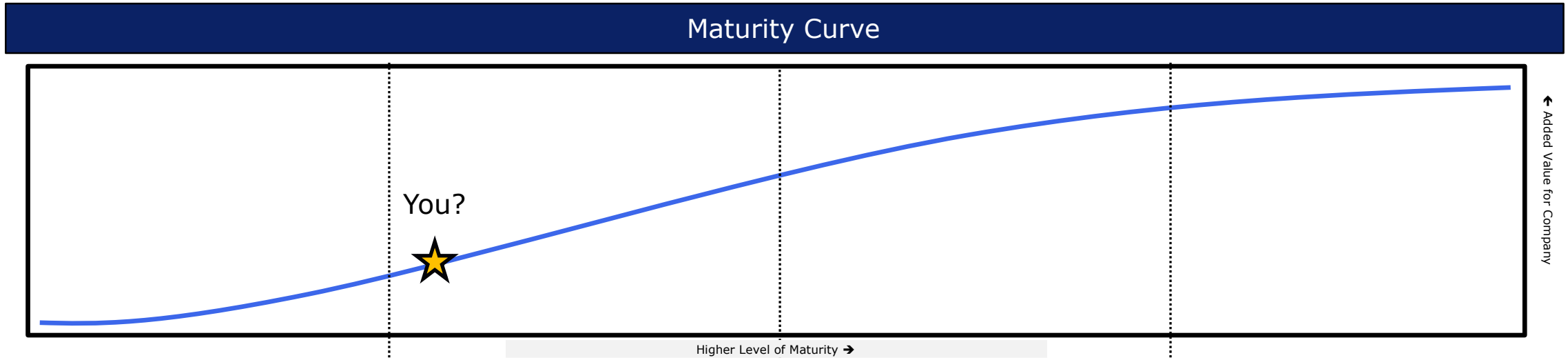
Maturity Level

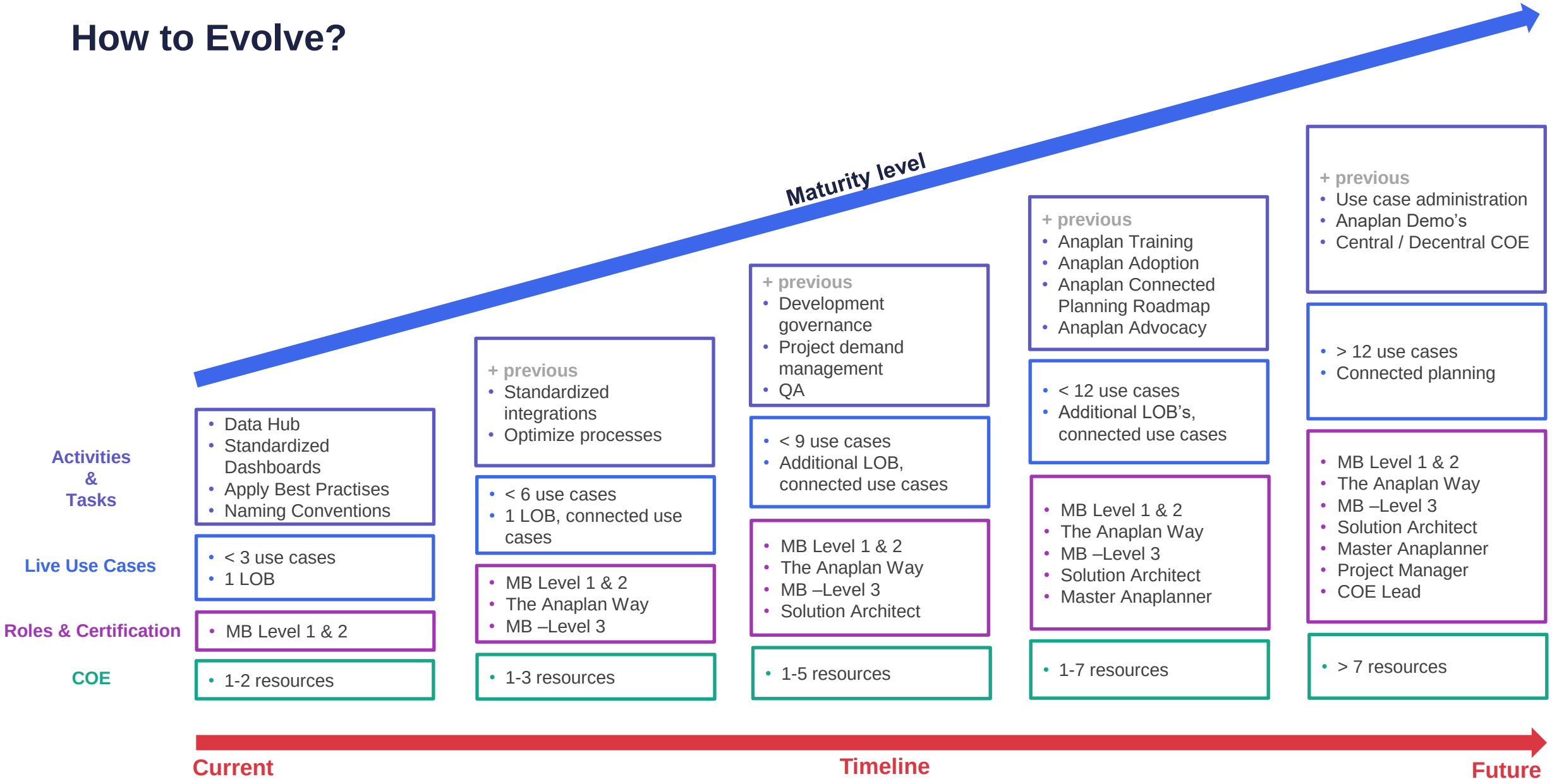
Journey towards Self-Sufficiency

- This maturity curve helps to show progress on your overall journey with Anaplan
- Establishing a Center of Excellence (CoE) to formalize the people and processes will drive alignment and ownership of solutions, and therefore unlock the full value of Anaplan



REACTIVE	INFORMED	PRO-ACTIVE	PREDICTED
Typically: • Anaplan Training: Level 1 • In-House Support Team: Minimal • Partner: Heavy Reliance for Delivery	**Typically:** • Anaplan Training: Level 2 • In-House Support Team: In Progress • Partner: Lower Reliance for Delivery	**Typically:** • Anaplan Training: Certified Model Builder • In-House Support Team: Established • Partner: Shifts from Delivery to Strategic Support	**Typically:** • Anaplan Training: Certified Solution Architect on the path of becoming a Certified Master Anaplanner • In-House Support Team: Robust and Scaled • Partner: Strategic

How to Evolve?



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How would you rate your current COE maturity level?

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Setting up a COE / Governance Models

Start by prioritizing your CoE components

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Access to Support

- Internal Support for both technical & application [use case] help for business
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- Sharing and pooling practical knowledge
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- Identified Steering Committee
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- Utilization of the 'Data Hub' concept
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Then, chart the development of your CoE

Phase 1: Foundation

1. Deploy the 1st project successfully
2. Establish your governing body
3. Establish your governance
4. Designate/hire the delivery team
5. Establish the sprint cadence

Phase 2: Centralize

5. Establish central responsibilities
6. Establish functional representatives in business
7. Designate a central solutions architect
8. Establish a process for creating a new model

Phase 3: Scale

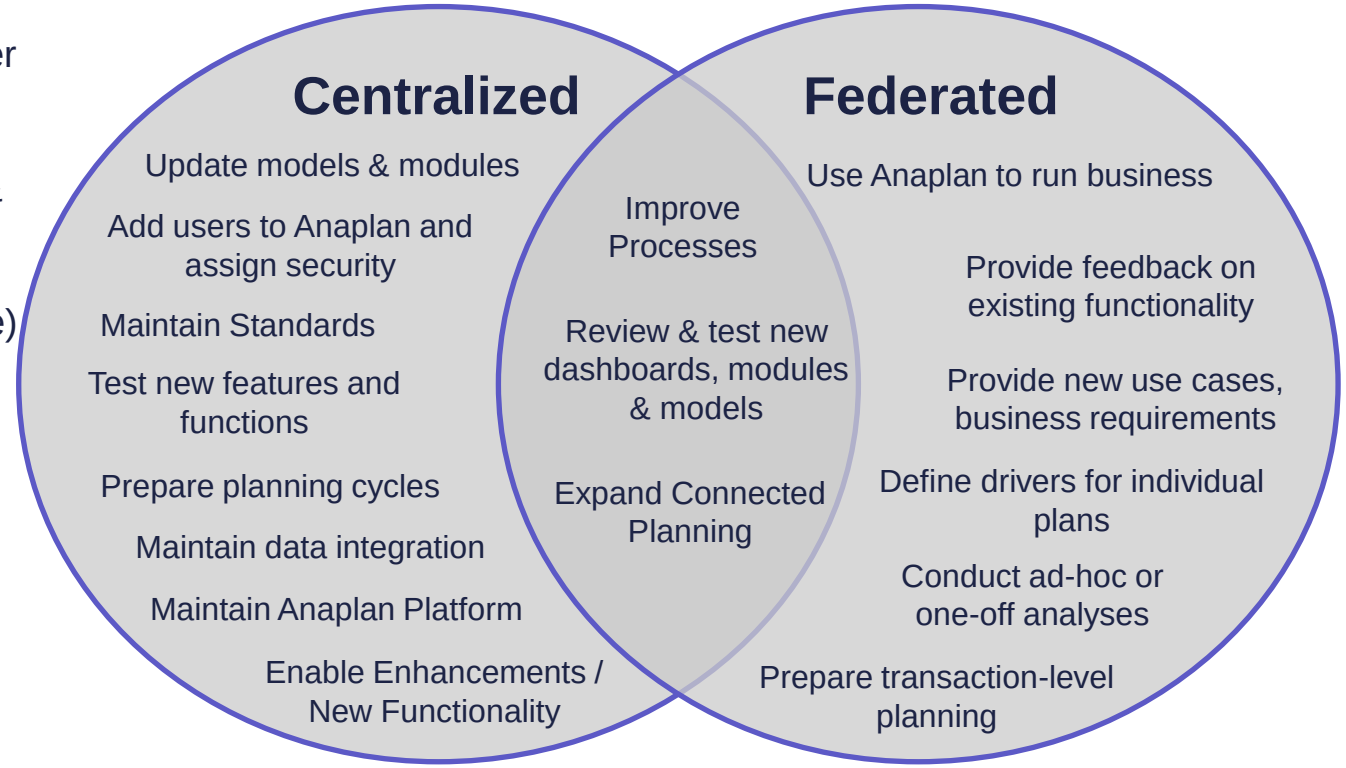
9. Attract attention across the organization
10. Enable widespread planning excellence

Every CoE is unique, determine the right level of centralization with this framework

Centralization Benefits

- Maintain central control over expanding use cases
- Ensure consistency (data & meta data, model design, processes, user experience)
- Share standards, best practices, and lessons learned
- Coordinate training
- Standardize communications

Interactions



Federation Benefits

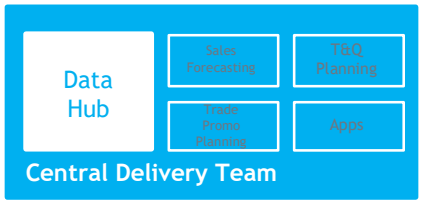
- Empower groups to create individualized plans
- Create a ‘service’ to enable cross-functional efficiencies
- Unlock the full potential of Connected Planning
- Encourage independence and self-paced deployment
- Allow for flexible reactions to constantly-changing information

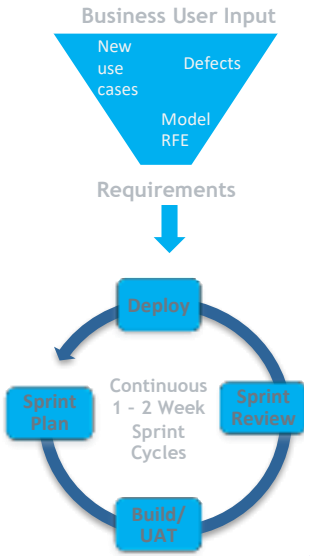
Depending on your centralization blend, select the appropriate governance model

Centralized Governance & Ownership

Central Delivery Team:

- Build central models
- Communicate release expectations
- Manage hierarchies
- Conduct data loads
- Resolve defects
- Build solution enhancements
- Run new use case projects





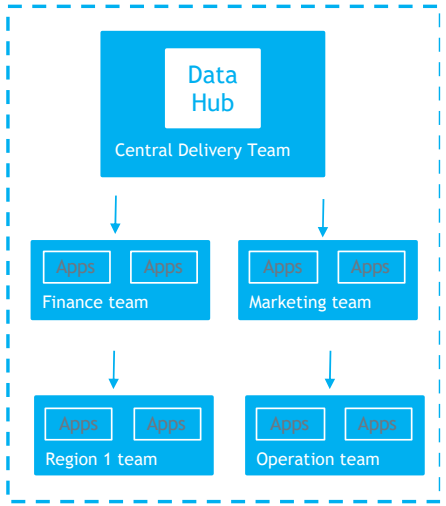
Centralized Governance, Federated Ownership

Central Administration

- Hierarchies
- Data loads
- Defect Fixes
- Modeling Best Practices
- Data Hub
- Connected Planning

Federated Ownership

- Small Subsets of the Master Model for scenario planning
- Hyper growth companies with small base of end users
- Independent Use Cases utilized by small user base
- Custom or In depth analysis/metrics

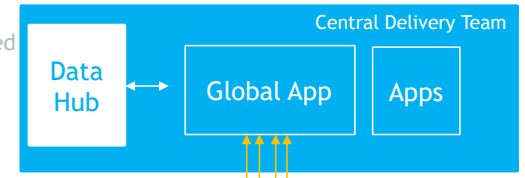


Independent Use Case Models

- Loose integration with Master model
- One-Way On Demand Data Integration
- Optional Data Hub integration

Hybrid Centralized & Federated

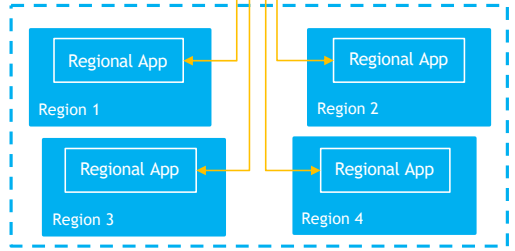
Global model for consolidated view and Corporate management Reporting



Frequent Updates of the Global App from Regional Apps

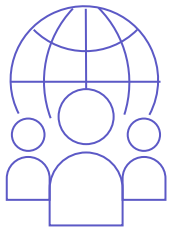
Send Targets and global drivers - Top Down

Regional models with more granular Planning



Federated & empowered team within Regions

Follow these Next Steps to build your CoE



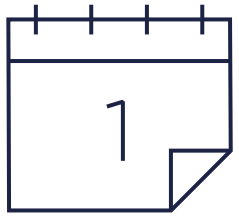
Identify business groups and individuals to participate in the conversation

Define connection points across your models

Create objectives and outcomes

Determine the training and enablement path that works best for your resources

Prioritize the components of a CoE to identify the best starting place



Communicate next steps internally and schedule a dedicated CoE workshop

Anaplan Live!

Almost done!

Session Resources

Please use the below link or QR Code to access session resources.

https://tinyurl.com/AL22Governance

Before you go…

Please take **2 minutes** and let us know your thoughts

https://www.surveymonkey.com/r/EnterpriseGovernance

Thank you!

Anaplan Live!