

Anaplan Groups Leader Guide

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Anaplan

Authored by: Anaplan Groups Team



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Overview

What are Anaplan Groups?

Anaplan Groups are where people with similar interests, business goals, or objectives can interact and collaborate along their Connected Planning journeys. Through a wide variety of events and dedicated Community spaces, Group members can discuss and exchange best practices, collaborate on challenges, and build long-lasting relationships with like-minded peers.

What are the benefits of Anaplan Groups?

Anaplan Groups equip members to improve and expand their use of Anaplan. Meaningful peer-to-peer connections, a robust online experience, and diverse engagement opportunities offer the mutual support, education, and shared knowledge necessary to accelerate and sustain their Anaplan journeys.

Anaplan Groups provide unique opportunities for members to:

- Gain insights about Anaplan platform functionality and best practices
- Discover new use cases
- Share and be inspired by success stories
- Get answers to their top questions
- Explore new and upcoming product updates
- Enhance their Anaplan knowledge and skills
- Meet and network with fellow Anaplan users and experts







Anaplan Groups Mission: Accelerate time to value and ensure Anaplan users and prospects can realize the full potential of Connected Planning and the Anaplan platform.

Anaplan Groups Vision: As part of the Anaplan Community, to be the place where Connected Planning conversations happen.

Group Leaders

Anaplan Group Leaders fully understand the value of Groups and seek to support the Groups mission. They are passionate about Anaplan and helping others realize its value. They selflessly share their time and expertise out of a desire to help others succeed.

Group Leaders are go-getters. They strive to create interesting, engaging, and even fun experiences for their Group members. Group Leaders recognize that the benefits and successes—to them and their Group members—are worth the effort.

Being a Leader Means		
 Engaging Leaders must consistently and actively engage with their Group as outlined below and regularly encourage others to participate.	 Hosting Leaders must host at least two events every year. Creating engaging events helps foster community and growth.	 Committing Leaders agree to contribute the time required for creating an active, thriving Group that provides value to its members. The exact amount of time may vary.
Leader Benefits		
 Recognition Leadership experience always looks good. Add your role on LinkedIn, show off your Group Leader badge in the Anaplan Community, and participate in exclusive opportunities for leadership development!	 Swag When possible, we enjoy thanking our Leaders for their contributions with custom care packages, as well as offering branded items to boost the impact of your events.	 Premium Support Enjoy direct access to the Leader Lounge—a private Group just for you and your fellow Leaders. Swap stories and content, suggest new ideas, and access our exclusive library of support resources.

Group Leader Guidelines

Group Leaders must be an Anaplan customer, partner, or employee

Leaders must already be active within the Anaplan ecosystem and be focused on creating a space for mutual support, education, shared knowledge, and meaningful peer-to-peer connections. Depending on your role, Leadership options and requirements may look a bit different, so please email groups@anaplan.com with any questions.

Group Leaders must use approved processes and tools

Group Leaders must understand and follow all approved processes using provided tools and resources in order to ensure consistency and accuracy in reporting official program metrics. This also guarantee the program team can provide optimal support to Group Leaders.

Leaders are also expected to stay informed about program updates and changes as provided by the program team through official program communications. Only events that adhere to Groups guidelines will be considered official Group events and be supported by Groups program resources.

Group Leaders must be active and engaged

The goal of Groups is to help customers realize incredible value from Anaplan. Group Leaders are responsible to keep their Groups active in order to grow and thrive. Since their activity sets the pace for their Group members, Leaders must lead by example and are expected to maintain active participation within their Groups and the Leaders Lounge.

Examples of activity include:

- Initiating forum discussions
- Inviting and welcoming new members
- Replying to member posts
- Promoting your Group within the Community and via external channels, such as LinkedIn
- Responding to communications from the Anaplan Groups program team
- Contributing shared resources to the Leaders Lounge (i.e., Topic in a Box, event guide or best practice, etc.)
- Hosting and promoting events

Recommended engagement minimums include:

- Two events per year
- Two Group posts per month

Groups or Leaders that do not maintain engagement minimums may be declared inactive and placed on hiatus (see **Evaluation and Review** section).

Group Leaders must schedule and facilitate events

As outlined above, events are a core engagement strategy for Groups. Events are an effective channel for communicating relevant information to Group members, generating new Group content, and facilitating connections between Group members and subject matter experts. Group Leaders are responsible for setting up and facilitating events using the approved processes and tools.

Some of the responsibilities involved with this may include selecting a date, creating an event page in Bevy, determining an agenda, coordinating presenters, finding a venue, promoting the event, inviting potential attendees, serving as event host, presenting at the event, and completing event follow-up tasks such as metrics reporting. Group Leaders must be present at all of their Group's events with the exception of Groups that have multiple co-leaders, in which case only one Leader must be present.

Group Leaders must serve as the main point of contact for Group members

Leaders will foster positive working relationships with Group members and act as a liaison between their Groups and the Anaplan Groups program team. Leaders should welcome new members, communicate relevant Groups program updates and information, and answer questions from Group members that other members are unable to address. The Groups program team will support Leaders in their efforts, and only interact directly with members when necessary.

Group Leaders must abide by Groups program policies

Program policies are provided to ensure the most valuable, beneficial experience possible for all Group members. The following expectations are provided in addition to and in support of the guidelines set forth in the signed Group Leader Partnership Commitment and the [Anaplan Community House Rules](#).

No solicitation or promotion of any kind is permitted in Groups or at events.

- Group Leaders will help protect Groups as safe spaces for members to contribute and learn equally and openly. They are not to be sales opportunities, lead generation initiatives, or platforms to promote or advertise services. All Group Leaders and members, including Anaplan partners and employees, will be expected to avoid all manner of personally beneficial promotion.
- Group Leaders should communicate potential breaches of this policy to groups@anaplan.com for review. The Groups program team reserves the right to remove from Groups or events any content or individuals deemed to be in violation of this policy.

All events must be free to attend

- Group Leaders may not charge for admission.
- Neither Anaplan nor its customers or partners may profit financially from a Group.

Evaluation and Review

The Anaplan Groups program team will regularly evaluate Groups, Group Leaders, and Group activity. The Groups program team will schedule periodic (no more than quarterly) check-ins with Group Leaders in an effort to provide updates and support Leaders in achieving their goals for their Groups.

A Group Leader's participation is voluntary and may be discontinued at any time for any reason. Violations of program policies regarding solicitation, promotion, and profit (see above) may result in immediate suspension of a Leader's role and privileges.

Group Leaders who are unable to regularly meet activity minimums or otherwise uphold their commitments to the program or their Group will be subject to review. In this case, the Leader will have the opportunity to meet with the Groups program team to determine whether they wish to continue in their role, suspend it for a pre-determined time period, or step down completely. Leaders who choose to continue will develop an action plan with the Groups program team, and then have 60 days to re-engage with their Group. Leaders who are not able to do so within that time or who undergo review more than once per year may be asked to step down.

Groups that have been inactive for a period of 90 days may be subject to review. Inactivity includes not hosting events, no interaction or new content in the Group on the Community, and little to no increase in membership. If the Groups program team determines a Group is inactive, they will alert the Group Leader(s) of impending review by email.

Once notified of review, Leaders will have 7 business days to confirm whether they would like to place their Group on hiatus or take action. A lack of a response from Group Leaders will result in automatic hiatus and potential closure of the Group. Groups placed on hiatus will be removed from public view in the Community and temporarily closed to new members until a re-engagement plan (possibly with different leadership) can be developed and executed. If Leaders wish to take action, the program team will work with them to develop an immediate action plan and the Group will be re-evaluated after 60 days. Groups that show improvement will be considered active again; if there is no improvement, the program team will determine next steps, which may include different leadership, placing the Group on hiatus, or Group closure.

Due to the growing and evolving nature of the Groups program, all Group Leader requirements and regulations are subject to change at any time. All changes will be communicated to leaders through the **Leaders Lounge, monthly emails, and/or quarterly check-ins. It is the Group Leader's responsibility to stay up to date with these communications and to stay informed about any changes to the Anaplan Groups program.*

Community Resources

The Groups program team supports Group Leaders through a variety of Community resources and touchpoints, ensuring they stay connected to Group members and each other and are equipped to be successful in their roles. Most of these resources are available in the Leader Lounge, and the Groups program team has committed to ongoing resource creation, process improvements, and technology enhancements.

Some of the resources include:



Leader Resources

Find how-to guides, FAQs, communication templates, agenda content, and more, created by the program team and your fellow Leaders



Private Leaders Group

Connect with fellow leaders in the Leaders Lounge to collaborate, exchange success stories, swap event ideas, and engage in friendly competition between Groups.



Group Forums

Dedicated space in the Community for your individual Group to discuss questions, plan events, network, and share resources.



Group Event Promotion

We want to help increase attendance at your events. The Anaplan Groups program team will give your events visibility on the Community, on Anaplan.com, and on social channels, when possible.

Leaders with specific ideas about resources that would be especially helpful for them are welcome to suggest those to the program team at any time.

Getting Started

Welcome! We are glad you're here and are interested in leading a Group. This section will explain how to apply to become a Leader, the onboarding process, and 5 steps for Group success.

Applying to be a Leader

If you have reviewed the guidelines in the sections above and would like to apply to help lead a Group, please email Groups@anaplan.com with the following information:

- Person(s) or team submitting the request
- Name of the Group you are requesting to help lead. Please check the **Explore Groups** section of the [Groups landing page](#) to determine whether your desired Group already exists.
- If you are requesting the creation of a new Group, please also include:
 - Preferred timeline for Group creation
 - Rationale for request (research conducted, department need, conversation with potential Group members, etc.)
 - Engagement goals (approximate frequency of events and posts, types of content to be shared, etc.)
 - Desired audience for the Group (employees, customers, partners, etc.)

Once your request has been submitted the Groups program team will contact you by email with next steps.

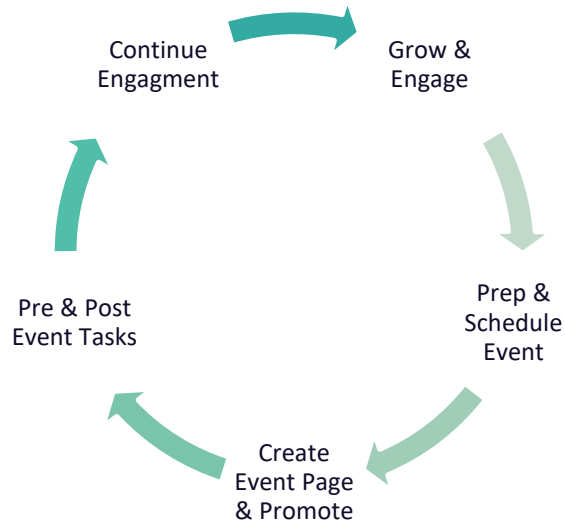
Onboarding

If your request is approved, the Groups program team will invite you to access the Group Leader Onboarding in Trello, where you will find a self-guided process to walk you through everything you need to know and to do to achieve success as a Group Leader. Tasks are broken down by your first 7 days, 30 days, 60 days, and 90 days, and include things like signing the Group Leader partnership agreement, completing your profile, familiarizing yourself with tools and resources, making your first Group post, and hosting your first Group event.

If you have any questions throughout the onboarding process, please email groups@anaplan.com.


5 Steps for Group Success

Group growth and success are tied to engagement, and it starts with you! The following five steps will help you create an engagement flywheel that has proven extremely helpful in keeping Group members returning, interacting, and growing.



Step 1: Grow & Engage

As a new Leader, before you start inviting people to join your Group, take some time to ensure new members will find a welcoming space and a clear, convenient way to jump in when they join. Create a forum post to say hello and prompt them to introduce themselves (see example below). Think of it like a digital welcome mat for your Group.

 **Tip:** Just as you would do in your own home or at a party you were hosting, be sure to welcome new members personally whenever you see someone join or post for the first time. Knowing someone is listening and responding will encourage them to post again!

Sample images are available in the Groups image resource gallery that can help give your welcome posts extra personality.



Example Welcome Post

Subject: Welcome! Get started here

Body:

Hello, and welcome to the [GROUP NAME] Group!

We're glad you're here. We (your Group Leaders) are here to help you as best as we can, so please reach out at any time; you can tag us on a post or send us a private Community message. Use the Forum to ask questions and start new discussion topics with other members.

Meanwhile, please take a moment here to introduce yourself to the rest of the Group. If you feel comfortable, start by sharing:

- Where you are in the world
- What brought you to the Anaplan Community / what you're working on
- What goals you have for your participation in this Group / how this Group can assist you


Thanks again for joining the Group; we look forward to meeting you!

— Group Leader Name(s) and user names (be sure your user names are linked so Members can easily visit your profile and send you a message)

Be sure to respond to the post and be the first to answer your introductory questions. If you're joining an existing Group that already has a welcome thread in place, you don't need to create a new one. Either way, in addition to any welcome thread, be sure to also create a post to introduce yourself. Share a brief bio so your Group members can get to know you.

Once there are some posts in the forum, it's time to invite people to the Group. There are a few ways to invite individuals to join:

1. From the Group space, select **Invite Members** from the **Options** dropdown menu to personally invite individual Community members by their user names. This will send them a private Community message containing a convenient link to join the Group.
2. Send them a personal invitation containing the Group page URL via email, LinkedIn, etc.

 **Tip:** Posting in your Group forum is a great way to learn what topics are top of mind for your Group members (which can lead to more great discussions) and to promote your upcoming events.

Step 2: Prepare & Schedule

As the Group grows and there is an increase in engagement within the Group forum, it's time to consider planning the first event. When planning for an event, consider the following:

1. Purpose

What is the purpose of the event? Think about the end goal of the event and what topics should be covered to achieve this goal. To see what might be most helpful for your members, review any conversations from the Group forum, check the Community blog, best practices, or other forums for current topics, and browse the Leader Resources page for helpful articles on topic ideas.

2. Type of event

Determining your event purpose and topic will help you decide what type of event to have. Also consider how many people may attending and if there are any current circumstances that could impact the event type (i.e., COVID-19). The following are three different event types and recommendations for when to utilize them:

- a. **Virtual** events are great for reaching a wide audience, since there is no travel required. They are relatively easy to set up, with little or no cost. A virtual event can be any length, but work especially well for shorter, more casual sessions.
 - i. Virtual Conferences are an option for large virtual events that require multiple interaction styles and content streams. These are incredibly versatile events, but they require a larger level of effort, and there is a per-registrant cost. Please contact groups@anaplan.com for more details.
- b. **In-person** events work well for larger gatherings, allowing people to break off and network with peers. These can last several hours and often involve refreshments; as a result they are higher-cost and higher-effort to produce. *Due to COVID-19, in-person events are suspended until further notice.*
- c. **Workshops** can be in-person or virtual. These are typically shorter events and are used for trainings or to focus on one specific topic, such as *Level 1 Model Building: The Basics* or *New UX Overview*.

If you have ideas about additional event types, or even custom event types specific to your Group, we can help create those for you. Please contact the Groups program team to discuss further.

3. Date & Time

When selecting the date and time, consider your audience's time zone(s) and any potential conflicting events or holidays that might impact their (or your) ability to attend. Be sure to consult your Group members in the forum for their input. Select your date and time carefully to help prevent the need to reschedule your event once you have announced it.

4. Venue

The venue will depend on whether the event is in-person or virtual. Each requires its own set of considerations.

Virtual


- Consider which virtual event platform to use and ensure that you are familiar with its functionality. The Anaplan Groups team recommends the use of Bevy Virtual as the platform of choice for virtual events, however we also support Webex and Zoom. Other platforms may be available to you, but are not fully supported by the Anaplan Groups team. Bevy guides are located in the Leader Resources knowledge base; please contact the Group team for training or with questions.
- Always do a dry run before the event. Be sure to provide clear instructions to attendees if there are any additional steps needed to join, attend, or troubleshoot issues.
- You may wish to consult with or request support from Anaplan IT in advance in case of any technical difficulties.

In-person

- Find a venue that is centrally located and can accommodate the size of your audience. Make sure its AV capabilities are sufficient for your needs before booking the venue.
- Determine if your venue allows for refreshments, including food and alcohol. If they do, be sure to determine whether they allow outside vendors or require you to use their catering services.
- Consider offering a virtual attendance option (a hybrid event) for those outside your event's geographic area or who cannot attend (or do not feel comfortable attending) in person.
- When possible, we recommend utilizing Anaplan office spaces. These are flexible, accommodating, are typically centrally located, and are set up for your AV needs—with on-site IT support.
- Arrive at your venue *at least* one hour prior to guests arriving. This will allow time to arrange furniture, set up and test equipment, and finalize arrangements with IT, catering, and security.
- Always perform a dry run of your event ahead of time. Allow time to make last-minute adjustments.
- Provide clear event-day instructions to your attendees. Consider things like special parking or entrance/security requirements. Communicate these clearly on your event page, through pre-event emails, and via onsite signage.
- Add a "Welcome" or "Overview" section to your agenda to set expectations with your attendees. Introduce yourself, point out the locations of bathrooms and refreshments, and cover any necessary house rules or event guidelines.

5. Agenda & Speakers

While you don't need to have your agenda or speaker(s) locked in prior to creating your event registration page (Step 3, below), we recommend getting started as early as possible and having a general idea before announcing your event (see Step 2.1, **Purpose**, above). As you solidify agenda topics and presenters, be sure to add them to your registration page. You can even leverage the posting of a new speaker as an opportunity for additional event promotion (e.g., "Just announced! Simon Ritchie will be presenting at our upcoming Group event to share about..."). Again, be sure to use the guides and lists in the Leader Resources knowledge base to help determine topics and speakers for your event.

 **Tip:** In the event of last-minute changes or cancellations, always have a backup speaker or agenda item prepared. The Topic-in-a-Box assets in the Leader Resources knowledge base work well as backups.

Step 3: Create Event Page & Promote

The Anaplan Groups program uses Bevy as the Groups event management system. Even if you are not using Bevy for your event platform, all official Groups events will have a Bevy registration page.

Before creating an event page, Complete Bevy training with the Anaplan Groups program team as part of your Leader onboarding. To set up a 30-minute training, email groups@anaplan.com.

If you have completed your training and still have questions or need a refresher, start by referencing the Bevy guides and videos in the Leader Resources knowledge base. Be sure to review the "Creating an Event Checklist" and the "Before You Publish Checklist" sections in this guide.

After the event page is published, promote your event.

- Send event invites via Gainsight, Outlook, and /or Bevy
- Post in the [Anaplan Community LinkedIn Group](#)
- Review the [Event Invites](#) and [Group Event Promotion](#) articles to help get the word out about the upcoming event.

Step 4: Pre & Post-Event Tasks

More comprehensive timelines are provided for you in the Leader Resources knowledge base. However, in general, the week prior to your event and the days immediately following the event require special attention. The Follow-up Tasks are particularly important, as they provide the program team with event metrics required for program reporting as well as perpetuate engagement by helping your Group members capitalize on event momentum.

Before Your Event (1 week prior)

1. Finalize event agenda, speakers, digital assets such as presentations, and make any final adjustments to the Bevy event page, if necessary.
2. Send reminder emails and post any final promotions on social media or in your Group forum.
3. Run through presentations and test **all** technology (e.g. virtual platform, prompters, AV equipment). For virtual events, a separate rehearsal event is recommended.
4. *In-person event confirmations:* venue/room, food, AV rentals, name tags ordered/prepped, sign-in sheets or handouts printed, etc.

Follow-Up Tasks

1. Ensure everyone who attended is marked as “Checked in” in Bevy (especially critical for in-person events; for virtual events, this should occur automatically).
2. Add any additional questions to Bevy’s automatic post-event survey. *(This can also be done prior to the event; note that the email with survey is scheduled to send 24 hours after the event, unless you reschedule it for an earlier or later time.)*
3. Report attendance and any costs incurred to the Groups program team.
4. Share your event’s successes! Post recordings, links, and takeaways in your Group forum, share your results on Anaplan employee Slack channels, and add a quick write-up in the Leaders Lounge forum so other Leaders can celebrate with you.
5. (Optional) Send any other follow up emails, such as an additional “Thank you” to attendees, a wrap-up email with relevant links or recordings, or an email to registrants who did not attend to let them know you hope they can attend next time.

Step 5: Forum Engagement

Congratulations on a successful event. Now, the final step is to take a breath and keep going! Continue the process and maintain momentum in the Group forum. We cannot stress this enough: stay engaged and active in your Group! Keep Group members talking, asking questions, and excited about the Group success. Ask members what they thought about the event, what questions they still have, what they want to learn about next, and when they want to do another event.

If you need help, the **Leader Resources** knowledge base has articles on how to post in the forum, topics to talk about, and engagement tips. Also, check in with your fellow Leaders and the Groups program team in the **Leaders Lounge** to get ideas and encouragement.

Bevy: Event Management System


Bevy is the Anaplan Groups program event management system. Bevy is where event registration pages are created and hosted, attendee lists are managed, and analytics are tracked for all events. Bevy also centralizes significant portions of event communications, including automated emails and post-event surveys. The process for creating an event in Bevy is very user friendly, and complete training will be provided as part of your Leader onboarding. Afterward, there are help guides and reference videos in the Leader Resources knowledge base to assist you. Below is a quick reference guide to the various Bevy fields required for creating a beautiful event page.

Event	<ul style="list-style-type: none">•Select the most appropriate event type (i.e. Virtual, In-person, or Workshop)
Title	<ul style="list-style-type: none">•Clear & concise (i.e. Gotham City Virtual Coffee Hour)
Short vs. Event Description	<ul style="list-style-type: none">•Short description displays in event previews.•Event description should include information about the event and any extra details or pre-work.
Hidden	<ul style="list-style-type: none">•Select this box if you want your event to be hidden from the public events list•If selected, "Allow Automated Emails" will enable or disable automatic email reminders to Group members & attendees
Graphics	<ul style="list-style-type: none">•Choose clear, copyright-free images with no text and use correct image dimensions•Preview image on event page to check resolution and clarity of overlaid text
Date & Time	<ul style="list-style-type: none">•Select date, time, and time zone in which the event will occur
Agenda	<ul style="list-style-type: none">•Add agenda details•Add multi-day agendas (if necessary)
Virtual vs. Location	<ul style="list-style-type: none">•Virtual: select platform you are most comfortable with. Bevy Virtual is recommended, but Webex or Zoom may be used instead•Location: enter venue address for in-person events
Speaker Profiles	<ul style="list-style-type: none">•Add speakers, hosts, panelists, etc.•Include speaker images for better event page presentation
Tickets	<ul style="list-style-type: none">•Add at least one ticket type•Set ticket availability date (if necessary) and ticket-level maximums•Create hidden tickets (if desired)

Checklist: Before You Publish an Event

Review this checklist before clicking **Publish** on your event page. Be sure to utilize Bevy's **Preview** option to review the page as you check each item below.

- Event title states Group name and event type
 - i.e. Central City Virtual Group Meetup or Gotham City New UX Workshop
- Proofread event description
- Check for areas where formatting can improve the layout
 - i.e. creating headers, using bullets for lists, bolding key words, and adding links
- Is the hidden event option selected?
 - If yes: Is “Allow Automated Emails” selected?
 - If no: Does it need to be?
- Date, time, and time zone are correct
- Banner and thumbnail images are the correct dimensions and not blurry when viewing the page in Preview mode
- Agenda items are created in the Agenda section (not the Event Description) and formatted correctly
- Agenda cadence and times are correct
- Event type (Virtual or In-Person) is correct (if not, a new event must be created with the correct event type; do not attempt to proceed with the wrong event type)
- VIRTUAL Event: If using **External URL**, the link is present and correct
 - Note: For security reasons, do **NOT** use a personal Webex or Zoom room
- IN-PERSON Event: Location address details are correct
- Add all Speakers/Hosts/Partners in the People and Sponsors & Partners sections. **Do NOT** only list them in the Event Description or Agenda.
- Ticketing is set up, with all desired ticket types, appropriate maximums, visibility, and availability dates added correctly
 - If a *Waitlist* is necessary, ensure the correct quantity is listed and the **Enable Waitlist** box is selected
- Select **Publish**

 **Tip:** You must register for your event after creating it. Due to Bevy's security protocols around virtual events and the way the platform manages attendee check-in reporting, even event hosts and admins need to register.



Resources

Links

Anaplan Community: <https://community.anaplan.com/>

Anaplan Groups page: <https://community.anaplan.com/t5/Groups/ct-p/Groups>

Bevy: <https://usergroups.anaplan.com/>

Leaders Lounge: <https://community.anaplan.com/t5/Group-Leaders/gh-p/Leader-Resources>

Leader Resources: <https://community.anaplan.com/t5/Leader-Resources/tkb-p/Leader-Resourcestkb-board>

Leader Guidelines: <https://community.anaplan.com/t5/Leader-Resources/Leader-Guidelines/ta-p/66209>

Anaplan Groups Team

Aaron White | Groups Program Manager | aaron.white@anaplan.com

Hannah Tammen | Groups Program Coordinator | hannah.tammen@anaplan.com

Anaplan Community Team

Emily Dunn | Community, Experience Manager | emily.dunn@anaplan.com

Stan Gromer | Community, Technology Manager | stan.gromer@anaplan.com