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# Anaplan @ Meister

Model the future of the entire company on a single connected platform

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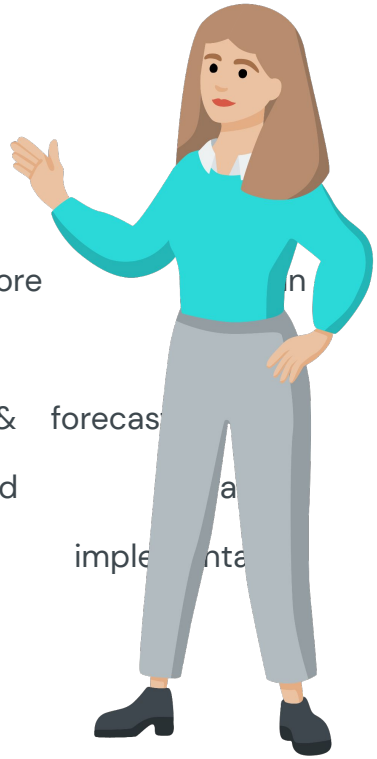
# Agenda

1. Intro to
2. Challenges we were facing before n
3. Why we chose
4. Benefits & the value of using a connected planning & forecas
5. Our Implementation Process and a
6. Challenges we were facing during imple nta
7. Next steps to establish the Anaplan-culture at Meister
8. Q&A



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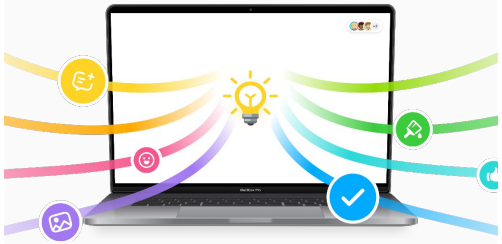
# Our Products



mind
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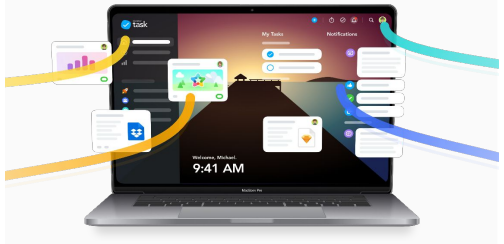
Beautiful mind mapping
for teams.

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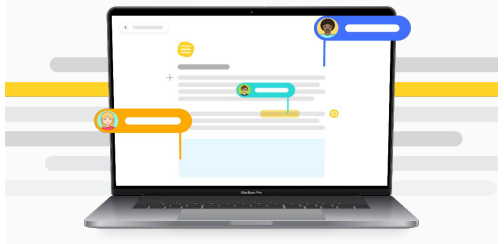
task

Intuitive, secure task
management for teams.



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note

Collaborative
documentation for teams.

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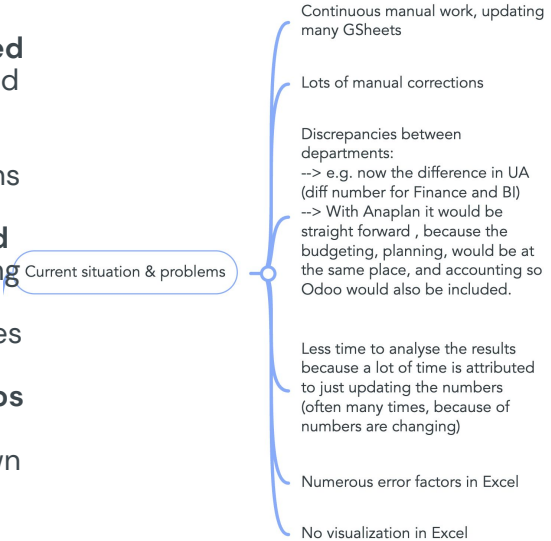
# Challenges we were facing before Anaplan

- **Planning processes are not centralized** → Finance can't see updates automatically → lot of manual work and re-sync
- **High error factor** because of manual data corrections, different versions
- Several different Excels, GSheets which **need to be merged** together for the company's Financial planning
- Dynamic planning and Variance analysis - difficulties
- **Difficult and time-consuming to build different scenarios**
- **Limited visualization** and comparison of the bottom-up and top-down planning



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# Why we chose Anaplan

- Provides **connected planning across the whole company**
- Deep market research → Anaplan seemed to be the best tool on the market
- Very good feedback from current Anaplan users
- Offers everything we need
- **Few steps ahead its competitors: e.g. AI-based forecasting**
- Implementation partner → Bedford **(help us building our models)**

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# Benefits

### Connected platform
Real-time access to information & easy collaboration between departments

### Automated processes & boards
Less manual work and reduced risk for human mistake → Increased efficiency

### Becoming data-driven
Intelligent decision making

### Dynamic planning
Reacting faster and adapting effectively to changing circumstances

### Helps to stay focused on target
Scenario-based planning & “What-if” scenarios

### Flexibility & Scalability
It grows together with the company: New modules can be added anytime

### Easier reporting & visualization
Personalized dashboards and built in dynamic reporting and presentations

### Easy to use & nice interface
Training videos for different use cases &, modern, well-designed platform

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# Timeline

**Preparation**

2021. Dec. - 2022. Feb.

All departments (ARR ownership, OKR setting) & Finance

**Detailed presentation to the Leadership**

2022. March

Finance

**Scoping session**

Beginning of May

Finance

**Pre-Release**:
Defining the objectives, and the detailed timeline

Mid of May

All departments

**Foundation:**

→ Project initiation
→ Design & Process planning
→ User stories
→ Regular calls with the departments, to build up the ideal department specific planning models.

End of May

All departments

**Implementation:**

→ Sprint reviews
→ Sprint replanning
→ Model analysis

End of May - Mid of September

All departments

**Test & Deployment**

2nd half of September

All departments

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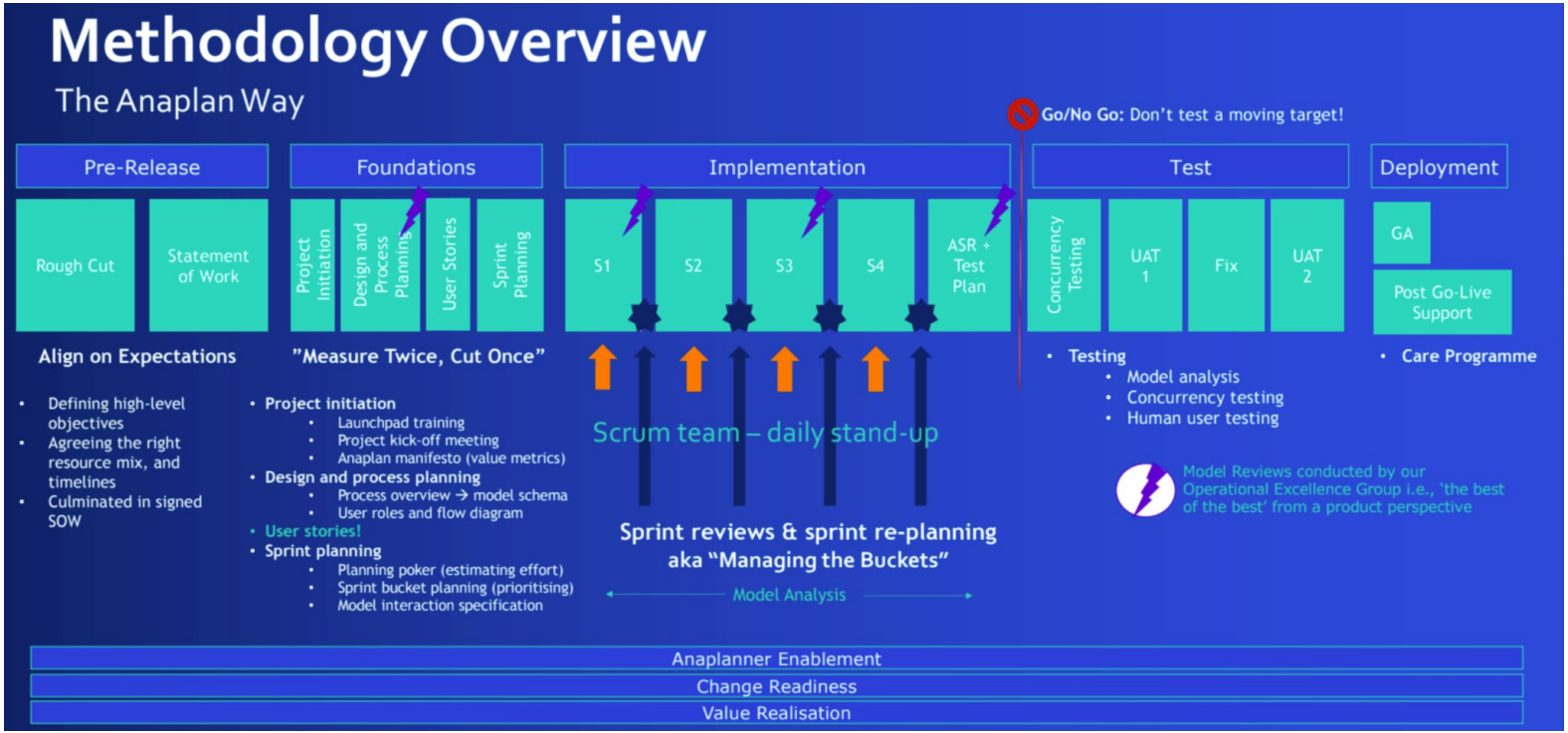
# Bedford as Implementation partner



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# Challenges we were facing during implementation

- Data readiness
- Summer ~ Holiday season
- Tough deadline - project timeline
- Initial assumption: Level 2 Model Builder training (without further experience) <> Model Builder
- Involving departments, who weren't really familiar with planning and forecasting
- Very **limited availability** of key people and Department Heads (UAT)
- Data issues, lack of resources in the Data Team (UAT)

- **But despite all these challenges we managed to successfully complete the implementation process!** 🎉

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# Next steps to establish the Anaplan-culture @Meister

- Tailor-made tutorial **videos** for the departments
- In-person forecasting day together to create a draft forecast
- Finance Team's continuous support
- Establishing the **steps and processes for the quarterly & yearly Forecasting Cycles**
- **Bottom-up & Top-down Variance Analysis**
- Budgeting
- **Data-driven decision making**

...

- Potential Phase 2

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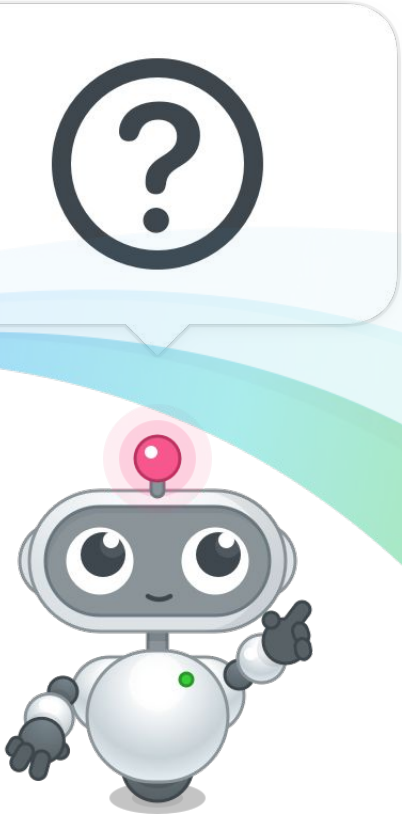

# Thank You

Any Questions?