

Reporting with Anaplan

Create engaging, intuitive, impactful reports that drive business decisions

Executive summary

Business leaders and key decision-makers must be ready for any type of change. Regardless of the catalyst of change—market fluctuation, internal drivers, or unexpected external disruption, business leaders must be prepared for how they will manage the organization amid heightened uncertainty. They must be able to easily create, iterate, and reference reports to inform planning scenarios and make decisions in an instant.

Delivering confident reporting hinges on leveraging up-to-date data from across the entire enterprise. This requires a unified platform with intuitive navigation and interface to make reporting accessible to all business users. Anaplan equips decision-makers with advanced reporting capabilities, empowering them to confidently engage and partner with fellow decision-makers to accelerate operational execution and drive positive outcomes.

A unified platform for engaging reports

Anaplan delivers a unified platform to streamline the reporting processes. Reporting capabilities powered by a seamless user experience (UX) span powerful connectors to enterprise-wide data and efficient extensions to third-party tools, so users can quickly create accurate reports based on a wide range of data.

Create engaging visual reports

With a single Connected Platform and intuitive UX, end users can easily zero in on data to glean new insights, spot emerging trends, and create “what-if” scenarios to make more informed reports and decisions. With Anaplan-native reporting capabilities, users can visualize their data with a variety of charts and graphs such as Gantt, bubble, scatter, and maps. Users can tailor their dashboards and visualizations to fit the needs of their organization and best articulate their narratives.

Report with confidence

Have confidence in data quality and accuracy from beginning to end of the reporting cycle. Access a wide set of data with seamless integrations to third-party sources to create more informed, impactful reports. Anaplan connectors and extensions integrate data in and out of third-party tools and services to create engaging reports based on your organization’s particular needs. These tools sync data between Anaplan and other services with just one click, so users can customize reports to their specifications.

Leverage Anaplan as a planning source-of-truth and seamlessly integrate and report with business intelligence (BI) tools of choice, such as Tableau or Microsoft PowerBI. Easily conduct enterprise-wide reporting that combines Anaplan data with data from enterprise resource planning (ERP), CRM, and other enterprise systems—all without requiring IT support.



**Surveillance
Security
Company**

A surveillance equipment manufacturer was using separate tools for planning and BI, making data collection cumbersome. With Anaplan, they can leverage Anaplan dashboards to easily see financial status at-a-glance and democratize planning. This keeps everyone up-to-date and saves time.

“We like Anaplan dashboards because they are easy to access and use.”



Forecasting scenarios prior to Anaplan was a tedious manual process for this healthcare company. Moreover, creating polished executive presentations to the C-Suite was a challenge. Anaplan allows them to deliver dynamic executive presentations with a unified platform for planning, scenario modeling, and reporting.

“Quarterly reviews and 10-year plans come to life with highly-visual dashboards and live scenario modeling.”

A multi-pronged approach to confident reporting

Anaplan’s multi-pronged approach to reporting delivers a seamless experience that simplifies the complexity of disparate reporting processes. Through an intuitive UX, powerful extensions, and connectors, Anaplan empowers business users and key stakeholders to make more informed decisions with speed and confidence.

Intuitive user experience

With Anaplan’s intuitive UX, a broad range of visualization, online reporting, and analysis are available to tailor to a variety of unique scenarios. Customizable visualizations help users make sense of data and spot trends. In addition, they help teams improve forecasts, analyses, and decision-making by viewing data across timelines, plots, maps, and charts.

In particular, powerful visualizations such as scatter plot and bubble charts reveal data correlation and inter-relation to shape a compelling visual narrative. Donut charts help

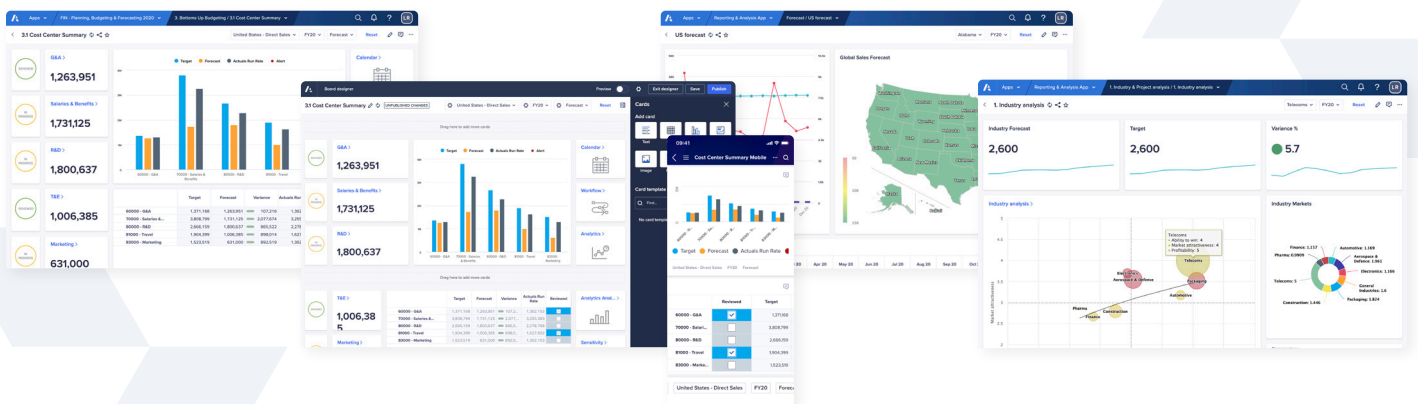
demonstrate a part-to-whole relationship and waterfall axis rotation lets users visualize data as a vertical waterfall chart to view more data in vertical scroll for better analysis. Users can easily design their dashboards with capabilities like “view designer,” which enables creation of custom views where users can pivot, filter, sort, select, and analyze data.

With Gantt charts, users can plan projects proactively to spot and remediate potential bottlenecks quickly. Users can leverage conditional formatting to color-code a bar or milestone based on their business logic. For example, teams can easily track if a project is over/under budget or under resourced with a milestone or bar set to a specific color. For example, you could make a milestone red if it is overdue.

Maps allow users to create heatmaps for different countries and states, and regions based on conditional formatting. From there, users can drill down deeper into worksheets where they can consider detailed analysis and edit specific data.

Teams can extract key insights quickly with usability features. Keyboard shortcuts help users make updates fast. They can also filter and sort the data in any grid, and maximize grids to deep dive into areas of interest. Users can also edit data in a specific portion of a grid to see the impact of “what-if” scenarios on a granular level. Adding sparklines to KPI cards also helps users quickly spot patterns among the most important data points to identify high- and low-performing KPIs.

Individual end users can also take advantage of UX features. The “my pages” feature lets users create custom self-service reports to see the specific data they need. They can also view key metrics with boards. Board PDF exports allow users to focus on point-in-time data and scenarios with snapshots that are easy to share and print. The mobile app lets teams collaborate on the go, providing access to important data and reports and allowing users to make updates and changes in an instant.



Key benefits

- Increase visibility into every asset, resource, risk, and change across disparate functions in the enterprise.
- Plot and pivot “what-if” scenarios to model options and pursue winning actions.
- Collaborate and target future planning implications and ultimate business outcomes.
- Shift from reactive to proactive decision-making.
- Drive better forecasting, gain end-to-end visibility, and reduce operational risk.
- Cast a financial line-of-sight into enterprise-wide operations.
- Strategically scenario-manage endless possibilities to best position for market opportunities and upheavals.
- Confidently anticipate the right moves to optimize revenue, cost, and profit.

Conclusion: Simplify the reporting process with Anaplan

Anaplan’s unified reporting capabilities help teams drive increased productivity. Capabilities span an easy-to-use UX and streamlined connectors and extensions to third-party tools and data so users can efficiently create engaging visual reports based on the most recent set of information. These capabilities equip key decision-makers with the most informed set of data as a single source of truth, empowering more meaningful and agile decisions across the organization.

About Anaplan

Anaplan, Inc. (NYSE: PLAN) is a cloud-native enterprise SaaS company helping global enterprises orchestrate business performance. Leaders across industries rely on our platform—powered by our proprietary Hyperblock® technology—to connect teams, systems, and insights from across their organizations to continuously adapt to change, transform how they operate, and reinvent value creation. Based in San Francisco, Anaplan has over 20 offices globally, 175 partners and approximately 1,500 customers worldwide.

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