

Anaplan Workflow

Automate and Act with Confidence and Speed

Executive summary

With the rise of hyper-automation as a key enabler of digital transformation, Anaplan Workflow empowers businesses by **digitizing their planning processes** and automating with other systems while speeding time to action through **efficient and effective conversation**.

Workflow enhances business planning by improving efficiency across the business with robust processes to spark meaningful two-way communication, allowing users, data and tasks to come together in real-time. With Workflow, businesses can automate a wide range of tasks that are unique to their teams and unlock the full potential of Connected Planning within the company and their extended ecosystem.

With Workflow functionality, business users can execute on different projects and processes quickly by reducing coordination overhead. Users of all levels of expertise can quickly understand what tasks need to be completed and by whom. Teams can design customized, automated process flows to ensure the right actions happen at the right time, while providing visibility into the tracking and reporting on the progress of plans.

As part of the broader Anaplan vision framework, Workflow enables users to plan more efficiently and allows businesses to ensure that they execute their well thought-out plans with confidence.

The image displays the Anaplan Workflow interface. On the left, a table titled 'Sales & Promotions Planning' shows data for months from Jan 23 to Sep 23. The table includes rows for Forecast volume, Action required, Total product cost, Promotion applied, Anticipated actual volume, Unit cost, Unit RRP, Total revenue, and Profit. A 'VP Approval' panel is overlaid on the right side of the table, showing 'Send back', 'Reject', and 'Approve' buttons, along with status and due date information.

In the center, a workflow diagram for 'Annual planning FY23/24' shows a sequence of tasks: 'Start planning process' (Complete), 'Sales plan: Global' (In progress), and three parallel tasks for 'Sales plan: AMER', 'Sales plan: APAC', and 'Sales plan: EMEA' (all In progress). These tasks lead to an 'Approve Sales plan' task (Not started). Each task has a '+2' icon below it, indicating a two-day duration.

On the bottom left, a 'Revenue & Profit Forecast' chart shows a line graph of revenue and profit over time, with data points for each month. The total annual profit is shown as \$9.94M and the product annual profit as \$425.4M.

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Anaplan Workflow enhances all planning processes by improving efficiency across the business with robust processes to engage users, secure approvals, and track progress. With Anaplan Workflow, businesses can automate a wide range of tasks that are unique to their teams and unlock the full potential of Connected Planning within the company and their extended ecosystem.



Drive efficiency across user-centric business processes

Automate the handover between stakeholders with automatic task assignment and notifications

Quick and concise approval steps ensure accuracy and secure sign-offs from the right people at the right time with no admin intervention needed



Ensure accuracy with clear task directives and instructions

Clear task instructions provided within all tasks and end user interfaces

Clear call-to-action buttons provide end users with a no-nonsense experience for completing, approving or rejecting planning work

Fix context selections to guarantee end users see the exact slice of data they need to act on



Engage diverse user groups with direct & simple experiences

Notifications sent to all stakeholders include direct links to exactly where action is needed – bypassing content screens and lists

Remove the need for manual checkboxes and action buttons by building these into process templates

Clear task inboxes help users identify exactly what needs to be done, and when



Make planning repeatable, automatic & templated

Workflow templates make definition, editing, and duplication of business processes quick and easy

The new Workflow Owner role helps organizations restrict who can and can't manage templates and running processes

Notifications are triggered automatically to task assignees and approvers when tasks become available to them or when they become overdue



Track and monitor planning progress with visual reports

Visual, flow chart style reports for Workflow Owners make it easy to track progress, identify bottlenecks and act

Integrate Boolean writes into process templates to track completions and approvals "in model"

Comprehensive activity and timestamp data captured to enable future audit reporting capabilities

Workflow, coupled with Collaboration, drives user engagement, helping to deliver greater accuracy and efficiency with little-to-no learning curve.

About Anaplan

Anaplan is a transformative way to see, plan, and lead your business. Using our proprietary Hyperblock™ technology, Anaplan lets you contextualize real-time performance, and forecast future outcomes for faster, confident decisions. Anaplan enables connected strategy and planning across your enterprise to move your business forward. Based in San Francisco, Anaplan has over 200 partners and more than 2,000 customers worldwide including Bayer, Google, ServiceNow and Shell.

To learn more, visit anaplan.com