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Success Central Monthly Meeting

The Home of Anaplan Scaled Customer Success

27 June 2024

Agenda

01 About Success Central

02 Anaplan Workflow

03 Q&A and How to Reach Success Central

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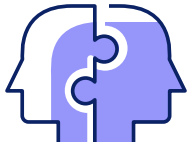
About Success Central

Launched in June 2022, Success Central aims to implement an innovative and scalable customer engagement journey through a suite of digital programs and various value-driven experience mechanisms.



01

Focused resources to drive higher-value engagement

02

Meet you where you are in your journey with us at Anaplan

03

Drive community engagement to nurture CoE levels of readiness for self-sufficiency

SUCCESS CENTRAL

Meet the Team:
Who We Are and What We Do

Business Partners

75+ years of collective experience in Customer Success

Our goal

Help you achieve your planning goals with Anaplan

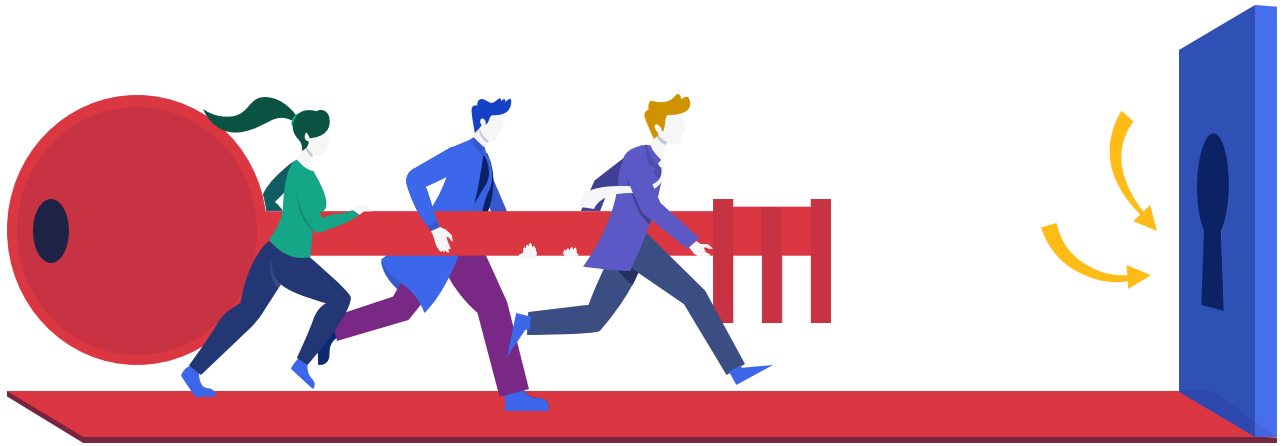
Success Central's Program Components

EXTENDED CS BP AVAILABILITY

TAILORED PLAN OF ACTION

ONLINE COMMUNITY OF PEERS

LIVE WEBINARS & OFFICE HOURS



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Guest Speaker

Dave Waller
Principal Product Manager, Anaplan

Disclaimer

The following is intended to outline our general product direction. It is intended for information purposes only, and may not be incorporated into any contract. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decision. The development, release, and timing of any features or functionality described for Anaplan's products remains at the sole discretion of Anaplan.

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Anaplan Workflow

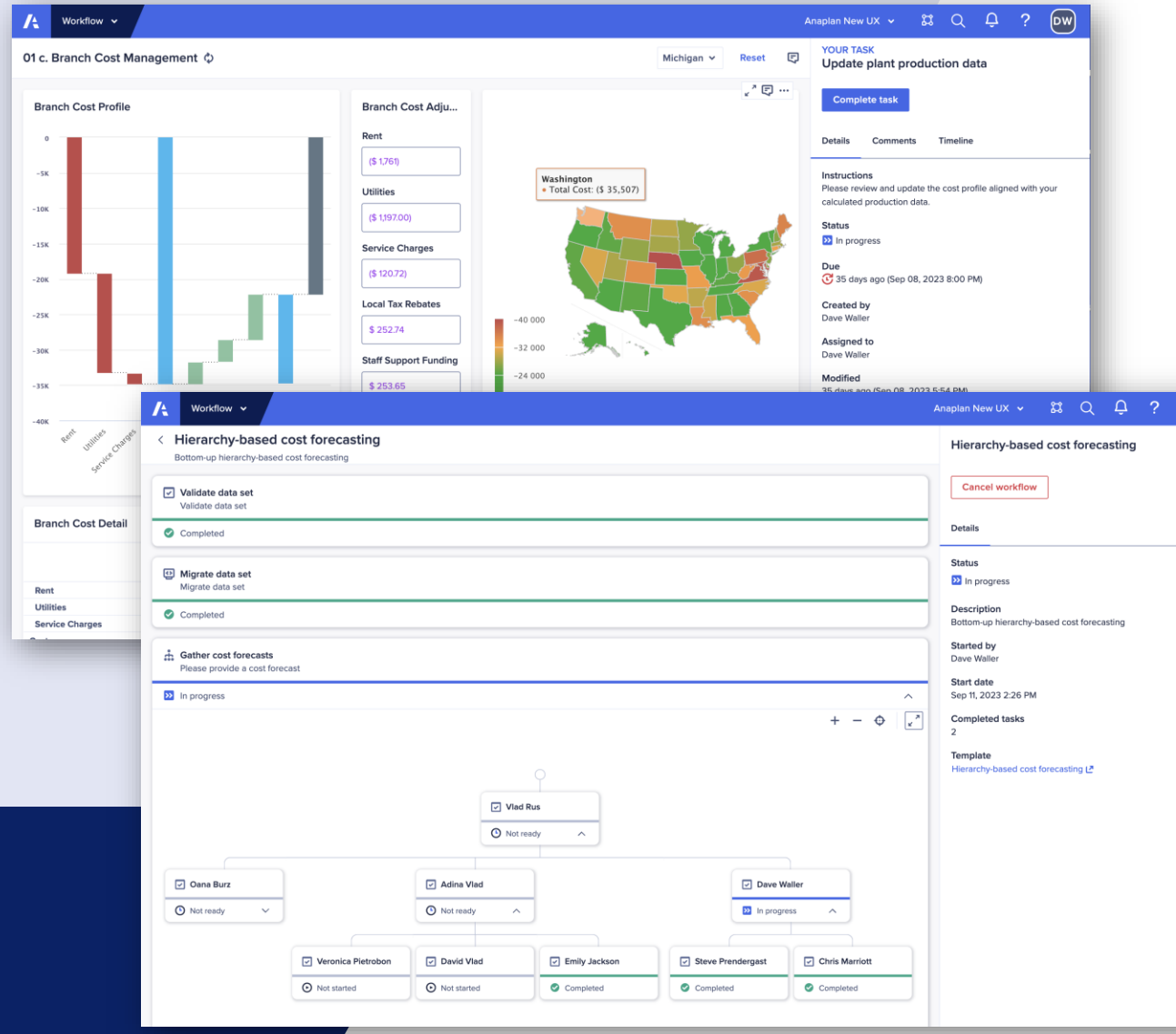
27 June 2024

Why Workflow?

Engaging large communities of users as part of planning can be costly and time-consuming, involving manual monitoring of progress and alerting when action is needed.

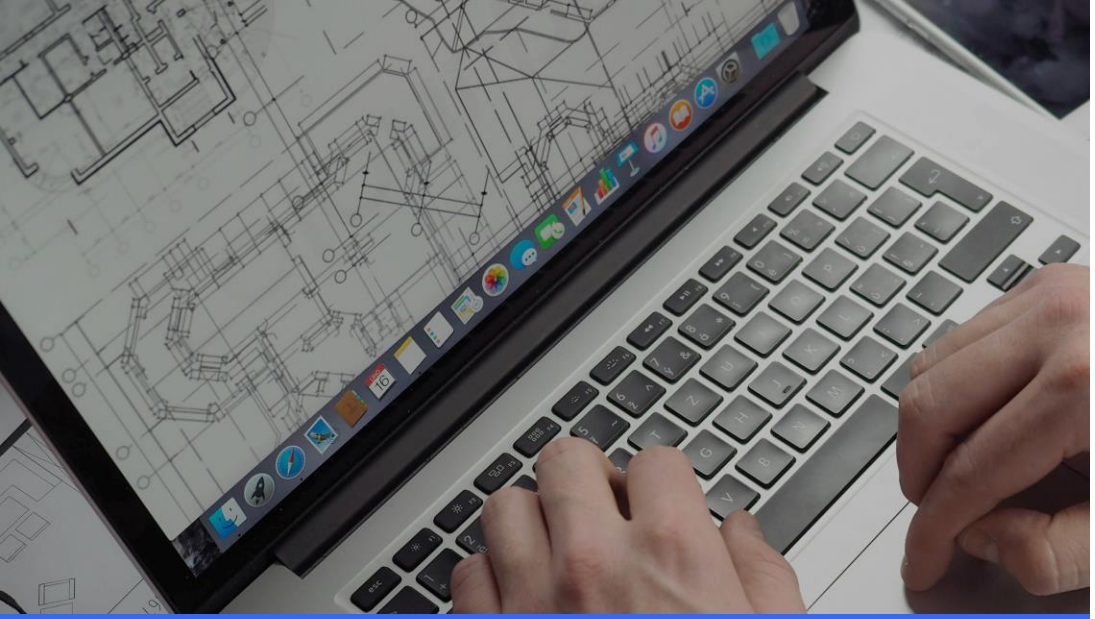
KEY CAPABILITIES

- ✓ Automate business processes making them repeatable, reliable and low-effort.
- ✓ Alert and notify users, drawing them in to act, exactly when needed and as quickly as possible.
- ✓ Provide end users with a clear, low-learning-curve experience when engaging with their tasks.



OVERVIEW

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



Customer story: Multinational Software Corporation

USE CASES – Finance

- Cash flow planning
- Free cash forecasting
- Accounts payable forecasting

CHALLENGES

- High administrative overhead managing the process
- Errors and inconsistencies in data lead to rework and cause costly delays
- No tracking of planning conversations spread across many platforms

BENEFITS

- Automated notifications and task transition reduces the need for administrators to manually manage the process
- Focused experiences for contributors and tight approval/feedback loops help guarantee consistent, uniform, and accurate data inputs
- Task-based commentary is moved from email / Teams chats / calls to a single, auditable location
- Reduction in overall planning time

Customer story: Pharmaceutical & Medical Technologies Corporation

USE CASES – COE operations / Finance

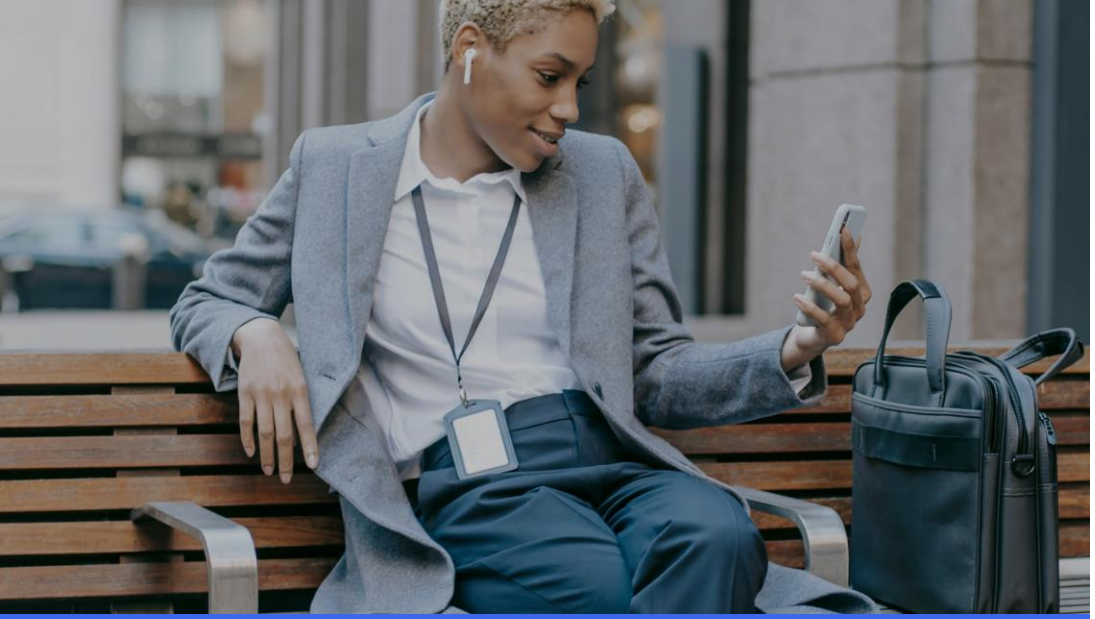
- Pre-planning model preparation
- Cross-department & cross-geo charging

CHALLENGES

- Pre-planning preparation is expensive, requiring many stakeholders from multiple teams with multiple, costly touchpoints
- Cross-geo charging planning spans across 150+ groups processing 600+ data changes per month

BENEFITS

- Reduction in expensive, offline communication – often consisting of 10+ attendees,3-4 teams, meeting multiple times per week, sometimes multiple times per day
- Automated notifications and low-effort approvals ease coordination of planning
- Accurate and timely tracking of process and task status
- Delivery of streamlined and targeted experiences for end users



Customer story: Global Social Media Platform

USE CASES – Sales

- Approval-heavy sales operations processes
- Revenue split agreements

CHALLENGES

- Low confidence in data quality can lead to low confidence decisions
- Stakeholders often leave submission of data to the very last minute
- Large volumes of data can make approvals complex

BENEFITS

- Targeted experiences for users and quick approval/feedback loops improve data quality and overall confidence
- Faster approvals with targeted approvers seeing only the most relevant content
- Reduction in overall planning stress experienced when time pressures are combined with unorganized data
- Reduction in last minute change requests using upfront data validation

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Workflow demo

Workflow – delivered so far…

Workflow, Actions & Collaboration

End user actions
- Simple page navigation actions
- Increased limit for notification actions
- Conditional navigation action buttons for UX pages

Workflow tasks
- Task inbox and notifications
- Manually assigned tasks for individuals and groups
- Auditable task timelines
- Context details included in task descriptions
- Task completion rules & deadlines

Workflows & templates
- Linear workflow templates
- Individual & group tasks,
- Manual workflow template triggering
- Template overrides
- Notification steps
- Visual, drag-and-drop template building

Approvals
- Ad-hoc tasks with approvals
- Workflow tasks with approvals
- Tasks with single or multiple approvers
- “1 of many” and “all” approval logic
- 1-step approval tasks with options for handling “rejects”

Hierarchy tasks
- Hierarchy-based parallel task flows
- Automated top-down **and** bottom-up hierarchy tasks
- Options to skip levels in hierarchy tasks and assign different pages for each level
- Visual hierarchy map to track progress

Automation
- Model-based machine tasks (imports, processes, & data write)

Model integration
- Assign group tasks based on model role
- Assign group tasks based on designated line-items
- Context pre-sets for line-item tasks
- Boolean model writeback for task completion
- Boolean model writeback for task approval or rejection

Reporting & compliance
- Graphical progress reporting for workflow administrators
- Completed workflow timeline export
- Workflow, tasks, and comments connected to Audit

Mobile
- Mobile task notifications
- Simple task completion experience for mobile users

Administration
- “Workflow Owner” role and assignment
- “Workflow Owner” role for cross-tenant users
- Workflow cloning and re-assignment
- Workflow and task archiving tools

Notifications & alerts
- Actionable notifications for task assignees
- Direct task links that automatically set page context
- Task reminders based on due dates
- Manually triggered task reminders
- Comprehensive notifications for Workflow Owners

Collaboration
- Task commenting
- Task comment @mentions
- Task comments with direct links

Spring 2024

Workflow - roadmap

Roadmap and scope is tentative

Workflow, Actions & Collaboration

Next

Workflow tasks
- Right-hand panel minimize capability for end users
- Management Report tasks
- Multi-page tasks with “in task” navigation links
- Offline tasks

Workflows & templates
- Action button triggered workflows
- Workflow scheduling
- ADO actions as steps in workflows
- Branching processes based on ADO success or failure
- ★ Independent task flows on branches
- ★ Reconnect branches
- ★ Automated, approval-based decisions and branching

Reporting & compliance
- Enterprise hierarchy task reporting enhancements
- Workflow usage reporting

Near

Workflow tasks
- Simple task delegation
- Mobile task creation
- NLQ generated tasks

Notifications & alerts
- Task context information embedded in task notifications
- Enhanced organization notification settings

Reporting & compliance
- Task comments included in completed workflow CSV export
- Commenting activity connected to Audit

Approvals
- Enhanced approval steps with customizable end user buttons and options

Workflows & templates
- Different task types for hierarchy levels
- Assign approvers based on model role
- Module-driven assignees for decision tasks
- Improved logic for task skipping when module-driven
- Automated, value-based decisions and branching
- Parallel task flows & “multi-thread” process support
- Flexible “send back” and review loops

Collaboration
- Worksheet commenting

Extensibility & Apps
- Pre-built workflow templates deployed alongside Apps

Future

Workflow tasks
- Enhanced task delegation
- On-screen guidance for end users
- Homepage task listings
- Workflow “task card” to add to UX pages
- Simple, form-based tasks
- Ad-hoc tasks for model builders
- Task escalation mechanisms
- Batch approval mechanisms

Workflows & templates
- Workflow categories / tags
- Text, user and date line-item data write
- Detailed workflow previews

Automation
- Data / value-based workflow triggering
- Process-based workflow triggering

Reporting & compliance
- Integrated workflow, comment and model history reporting

Collaboration
- Granular commenting settings
- Unified inbox
- Workflow notification preferences
- Commenting bound to data points
- “Quick approve” links for approvers in notifications

AI / ML
- AI reminders and prompts for Workflow Owners
- AI “early warning” workflow triggering
- Automated approval “send back” loops
- AI-driven automated approvals
- Automated AI decision points
- AI process improvement recommendations

Delivered | **In progress**

Summary

Anaplan Workflow enhances planning by improving efficiency across the business with robust processes to engage users, secure approvals, and track progress. With Workflow, businesses can orchestrate 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.

It is available to Anaplan customers, reach out to your Business Partner for further info.

- **Release date**: H2 2023
- **Platform pillar**: User Experience
- **Top personas**: Model Builders, End Users, Executives
- **Solutions**: All
- **Industries**: All

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How to Reach Success Central

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SuccessCentral@anaplan.com

ReplyToSuccesscentral@anaplan.com

Join and network with peers:

SC Community page

Thank you!

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