Anaplan

Success Central Monthly Meeting

The Home of Anaplan Scaled Customer Success

23 January 2024

Agenda

01 About Success Central

02 Model Building Tips and Tricks

03 Q&A and How to Reach Success Central

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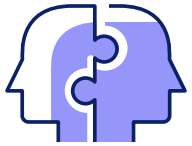
About Success Central

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

50+ years of collective experience in Customer Success

Our goal

Help you achieve your planning goals with Anaplan

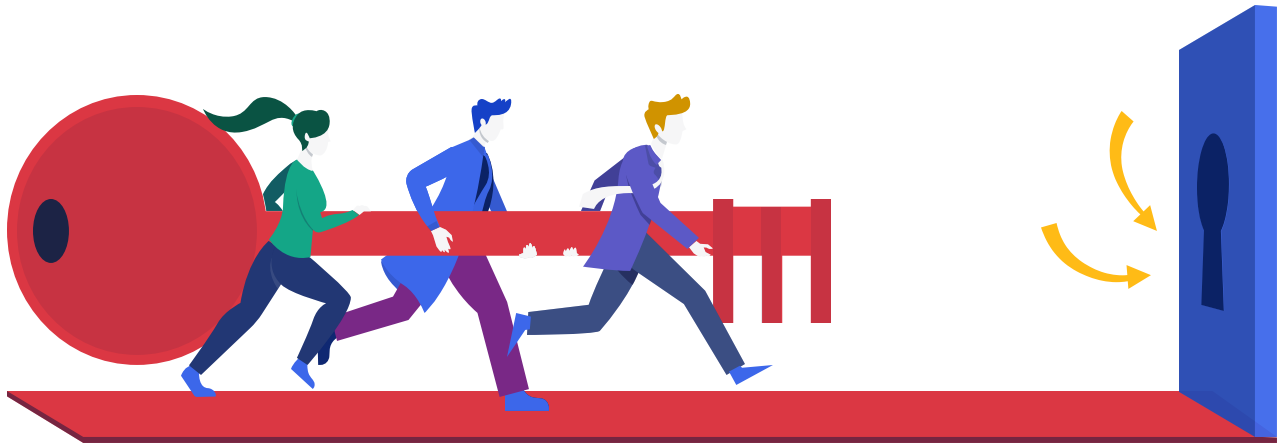
Success Central's Program Components

EXTENDED CS BP AVAILABILITY

TAILORED PLAN OF ACTION

ONLINE COMMUNITY OF PEERS

LIVE WEBINARS & OFFICE HOURS



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Guest Speaker

Lee McNally
Services Engagement Director

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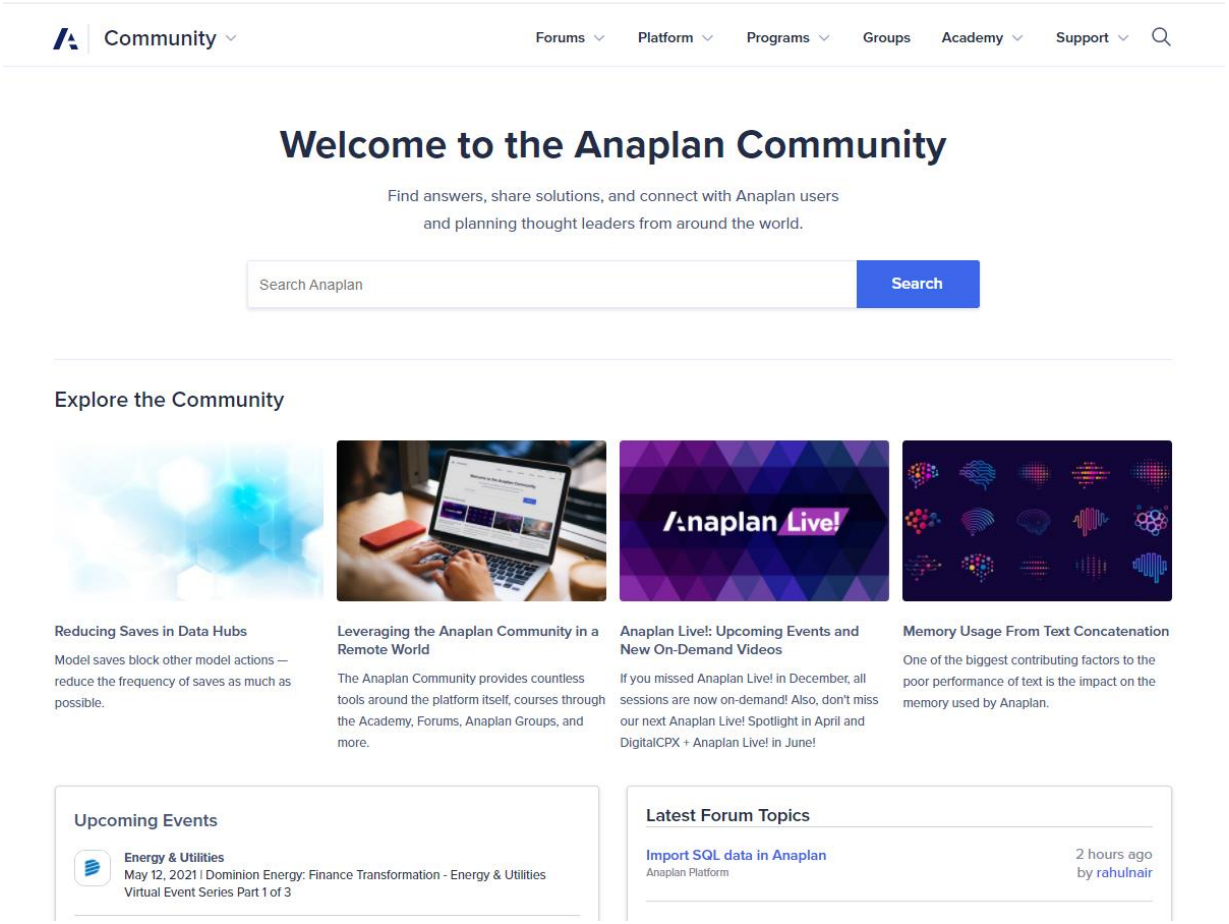
Anaplan Community, Anapedia & Academy Resources

ALWAYS AVAILABLE

Anaplan Community

Find answers, share solutions, and connect with Anaplan users and planning thought leaders from around the world

- **Forums:** Ask questions, get answers and inspiration on how others are using Anaplan
- **Academy:** Your resource for learning Anaplan. Whether you're new to Anaplan or sharpening your skills, check out our latest training offerings
- **Groups:** Interact and collaborate with others along your Anaplan journey
- **News, Networking, and Events:** Get updates about the platform and best practices, hear from experts and network with other Anaplanners during events
- **Master Anaplanners:** Learn more about our exclusive program for expert model builders



Get started at community.anaplan.com

ALWAYS AVAILABLE

Anaplan Community – Platform updates, documentation, and knowledge sharing

Find information on the latest Anaplan platform releases, including tutorials and best practices on how to use the newest Anaplan features

Platform Releases Blog

Read about new platform enhancements and releases

Platform Release Calendar

Learn more about platform maintenance windows

Feature Updates

Stay informed of what is on the Anaplan platform roadmap

Platform Discussions

Ask questions, provide feedback, and further discuss new features and enhancements to the platform

Webinars

Engage with Anaplan experts in a wide variety of topics

Idea Exchange

Suggest ideas for enhancing the Anaplan platform to better serve your needs

User Research Program

Be a part of our User Research program and share feedback on our upcoming features

Anapedia

Use our official technical documentation to understand capabilities for each Anaplan feature and how you can leverage them

ALWAYS AVAILABLE

Anaplan Academy – Online on-demand learning

A wealth of courses to take along your Anaplan journey – from beginner to advanced levels.

Access and learn at your own pace anywhere, anytime.

Level 1 Model Building

Provides the quick start you need for a collaborative and successful Anaplan project.

20-30 hours On-Demand

Level 2 Model Building

Takes Anaplan learning to the next level by guiding the learner through a true connected planning use case.

25-35 hours On-Demand

Level 3 Model Building

Design an Anaplan model based on best practices learned in Level 1 and Level 2 Model Building.

25-45 hours On-Demand

Anaplan Way

Learn Anaplan's methodology to implement Anaplan applications-- it's a philosophy and a way of working that is truly transformative.

Get started at learning.anaplan.com

Model Building Tips & Tricks

REFRESH OF PLANS AND DISCO

DESIGN CONSIDERATIONS

FORMULA TIPS AND TRICKS

UX BEST PRACTICES

PLANS – The Way We Model

- **Performance**: Use correct structures and formula to optimize Hyperblock
- **Logical**: Build the models and formulas more logically
- **Auditable**: Break up modules and formulas for better understanding, performance and maintainability
- **Necessary**: Don’t duplicate expressions; reference data once; no unnecessary calculations
- **Sustainable**: Build with future in mind, think about process cycles and updates

DISCO

Data
- Transaction & Source Data
- Data Hub

Input
- Design for user entry
- Don’t mix with calculations & outputs

System
- Time management
- Mappings/technical modules

Calculation
- Optimize for performance
- Group like together calculation structures

Output
- Reports
- Only data flows in

Design considerations and initial build

- Consider the end to end process with dependencies, and not in pieces
- Think of exceptions to the process and document them
- Document business requirements in the form of user stories and have them signed off
- Mock up the user experience to get an understanding of how planners will interact with Anaplan
- Build all hierarchies and their relationships in the first two weeks
- Load historical actual and build the actual period reports and validate against latest report
- Historical actual reports do not require any planning requirements yet, but it is the base and starting point of planning
- Design questions:
    - How do I plan first time after go live (it may not be same next forecast cycle or next year)?
    - Does previous budget (not prepared in Anaplan) need to be uploaded into Anaplan?
        - Usually at different granularity than we will plan in Anaplan
        - Going forward next year when doing budget 2024, budget 2023 was done in Anaplan and should be retained and not loaded
    - How do I plan next time and every time for all type of forecasts (ad hoc forecast, budget, scenario etc.)?
    - How many prior forecasts should be retained?

Formula tips and tricks

- Calculate once and reference everywhere (leverage System modules)
    - Improve performance, auditability and model size
- Breakdown nested formulas into multiple line items
    - Improves performance and auditability
- Turn off summaries for all line items where it is not needed (calculation line items)
    - Saves space and improves performance
- Separate SUM and LOOKUP functions into two line items
    - Improves performance
- Subsets is a great feature, but ensure a subset can be used by all dimensions
    - E.g. a subset can be used for all forecast cycles, don't create a subset specific to one cycle, checking/unchecking items in a subset can be destructive

Demo Model

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UX Best Practices

Sketch

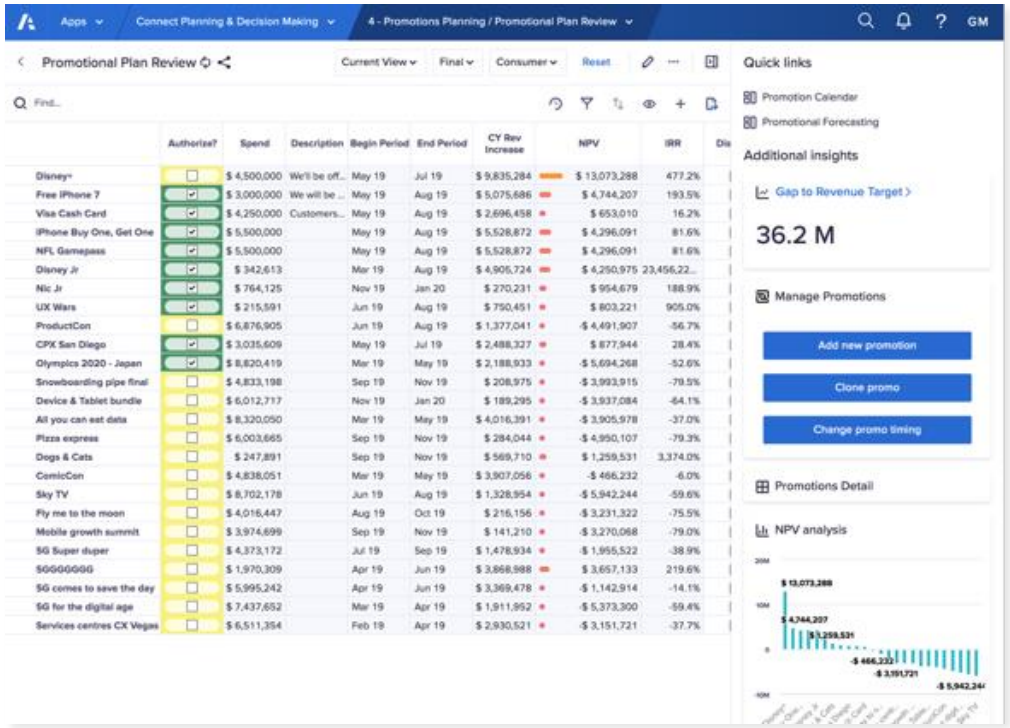
Use only pen and paper at this stage

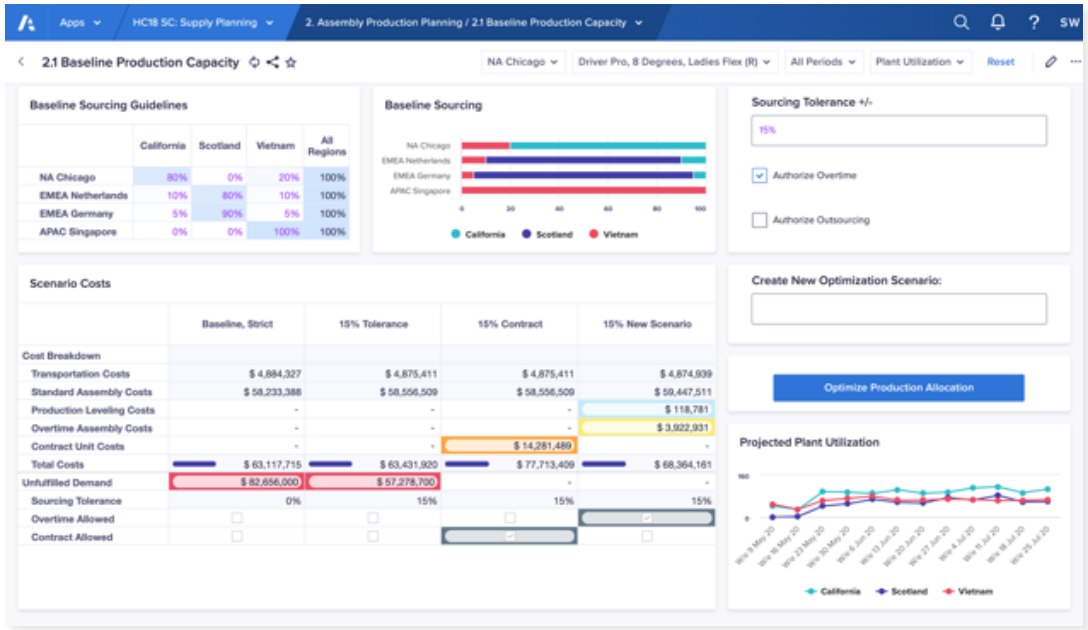
- Map out the journey of your persona
  - Highlight step-by-step actions
  - Storyboard interactions
- Draw the experience for the users
  - Simple boxes and sections
  - Or print/screenshot the existing experience (Classic dashboards or other existing tools)
- Re-envision the type of Pages
  - Boards or Worksheets

Sketch

How to choose between a Board and Worksheet?

- Working with large grids of data? Try a worksheet
- Overview? Charts? Landing page? Try a board
- Have a lot of dashboards in a process? Try consolidating details with the Insights Panel

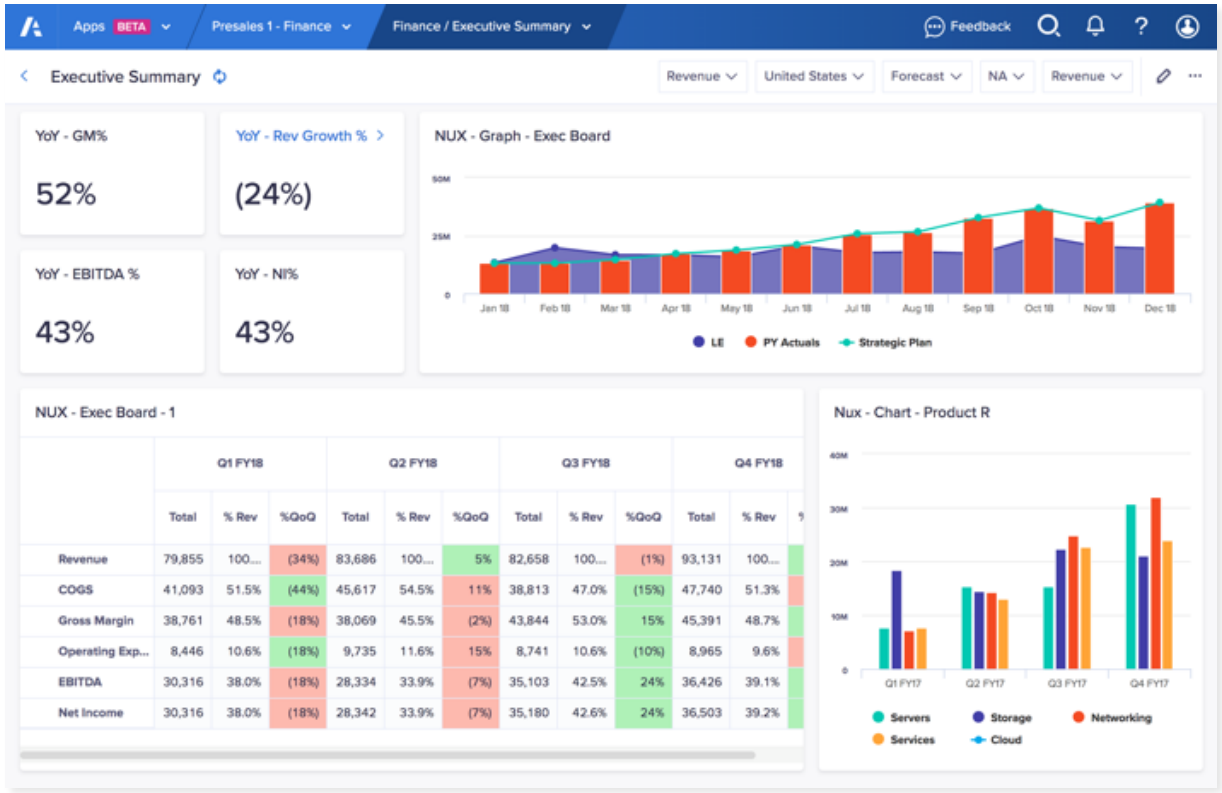




Best practices: Tip 1–Minimize time-to-decision

Focus on the outcome your users are attempting to arrive at and optimize for it

- Prioritize key KPIs at the top of pages, or on landing pages
- Provide easy access to key reports and analysis tools
- Don’t overwhelm with too much information
- Understand what types of decisions your users are trying to take
- Learn what actions users plan to take with different decisions?
- How does this inform the pages and features needed?



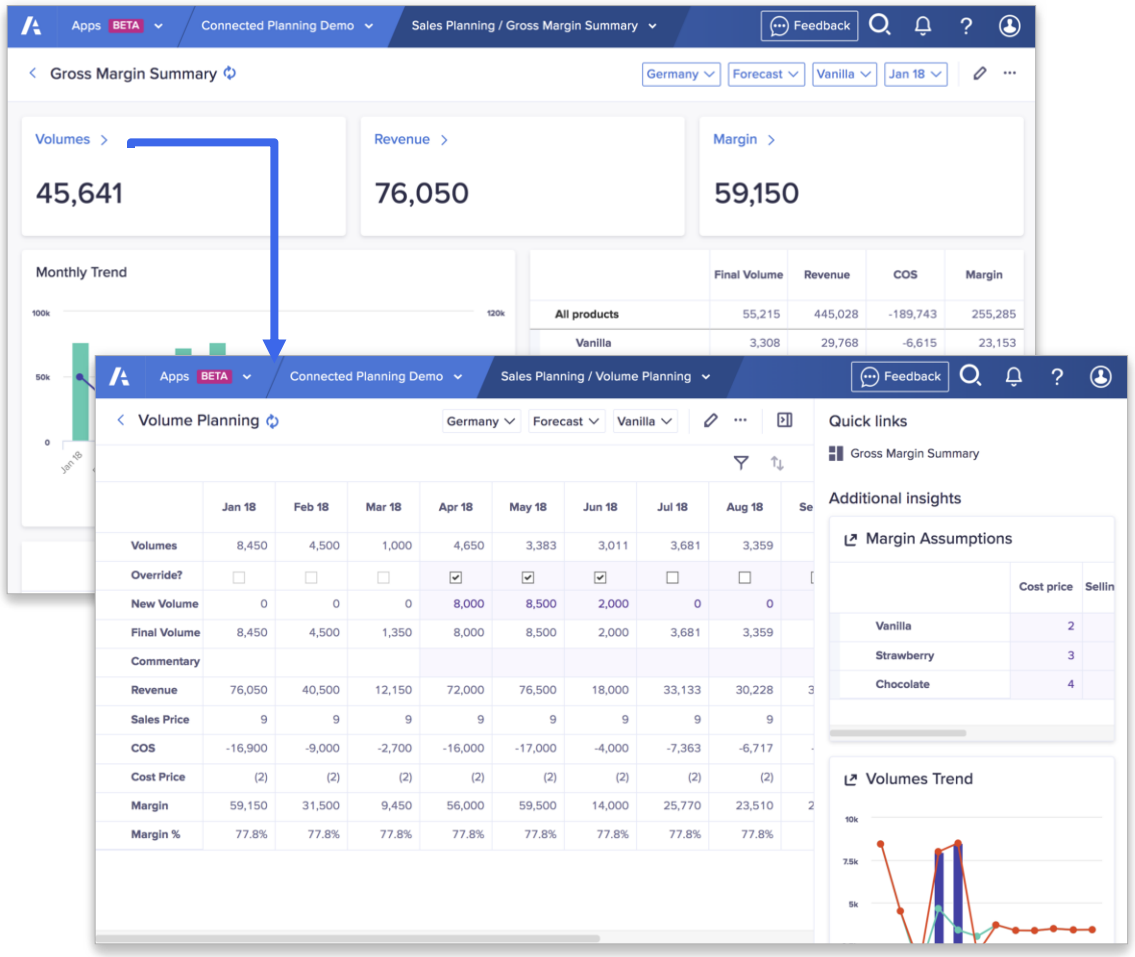
Executive Summary Board

Best practices: Tip 2– Progressive disclosure

Presenting data incrementally to keep things simple for users and avoid overwhelming them

- Present data in simple, digestible chunks
- Allow users to drill into more detail by linking summary data in cards to detail data in worksheets
- Place useful items in “Additional Insights”
- Data-dense and busy pages can overwhelm non-experts; keep it simple by eliminating anything that isn't needed
    - This is especially important on mobile as there’s less real estate

Summary on a Board



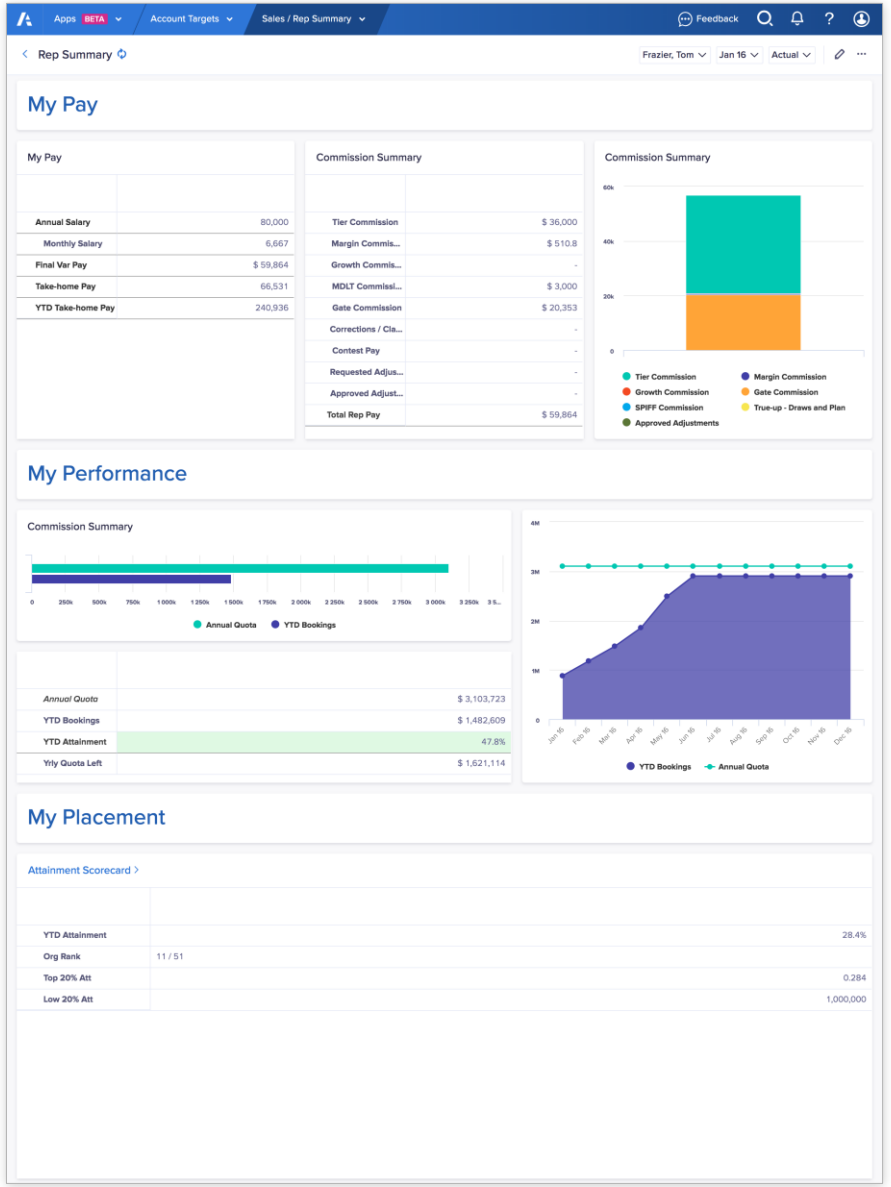
Details on a worksheet

Best practices: Tip 3– Smart grouping

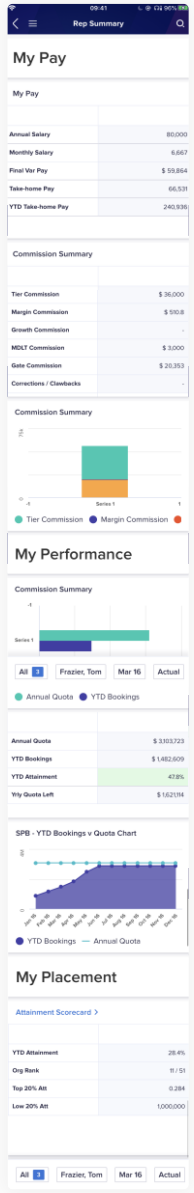
Grouping helps the user make sense of what they're seeing

- Group related data together in containers
- Use easy-to-understand categories
- Use text cards to provide headings, if necessary
- Use smart grouping to improve the mobile experience

Group related content and give groups headings



Desktop

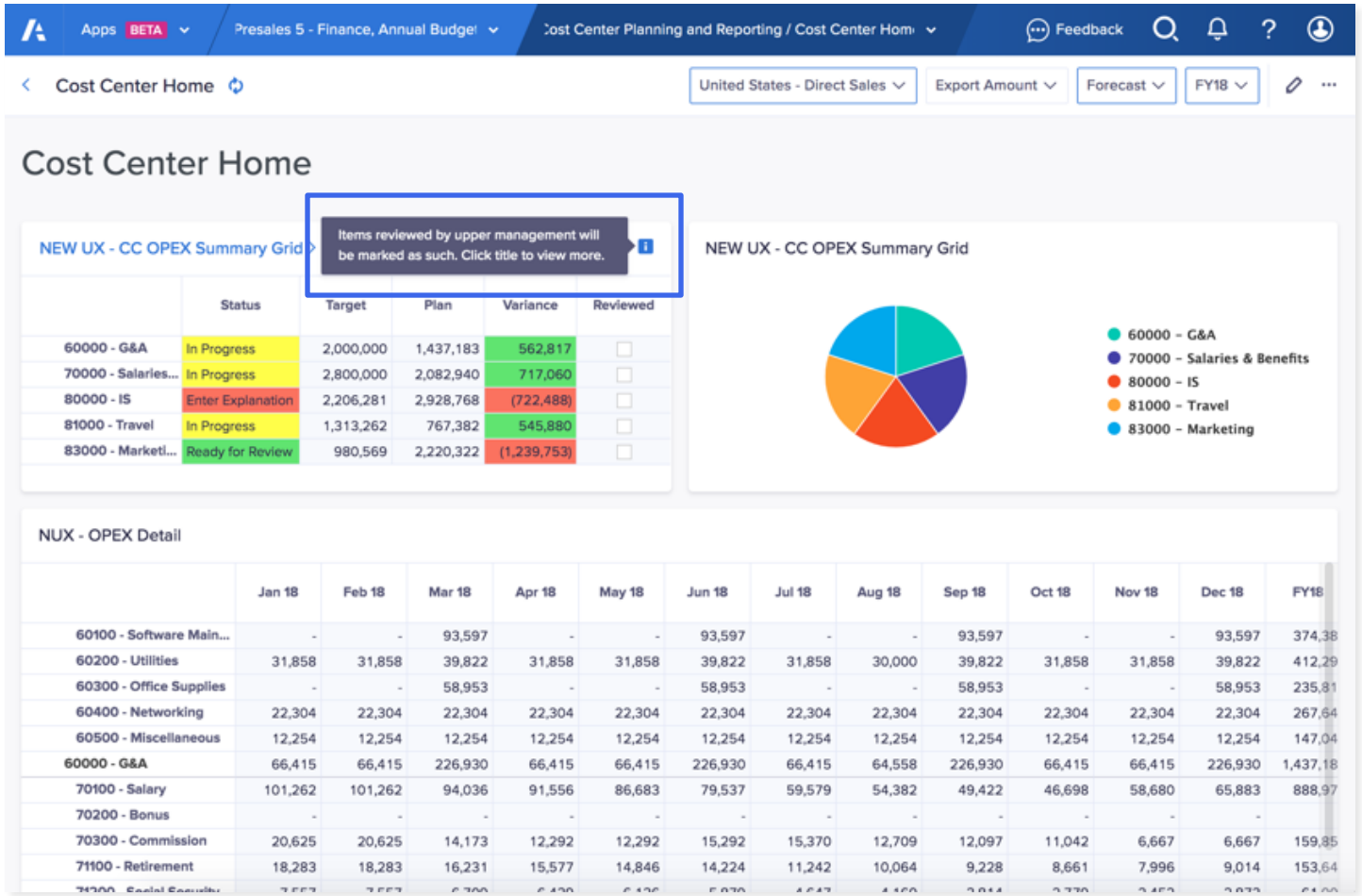


Mobile

Best practices: Tip 4– Help and guide

Provide hints to help guide users on what actions to take next

- Use text and instructions where needed
  - Use text cards for pages intended for less frequent users
  - Use tool tips for frequent users
- Provide custom tool tips to help explain visualizations
- Don’t overwhelm users with unclear, verbose language



Board with tooltips

Other Resources

- How to handle multiple streams of development on one model

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Product Update

January 2024

Product Releases – January 2024 so far

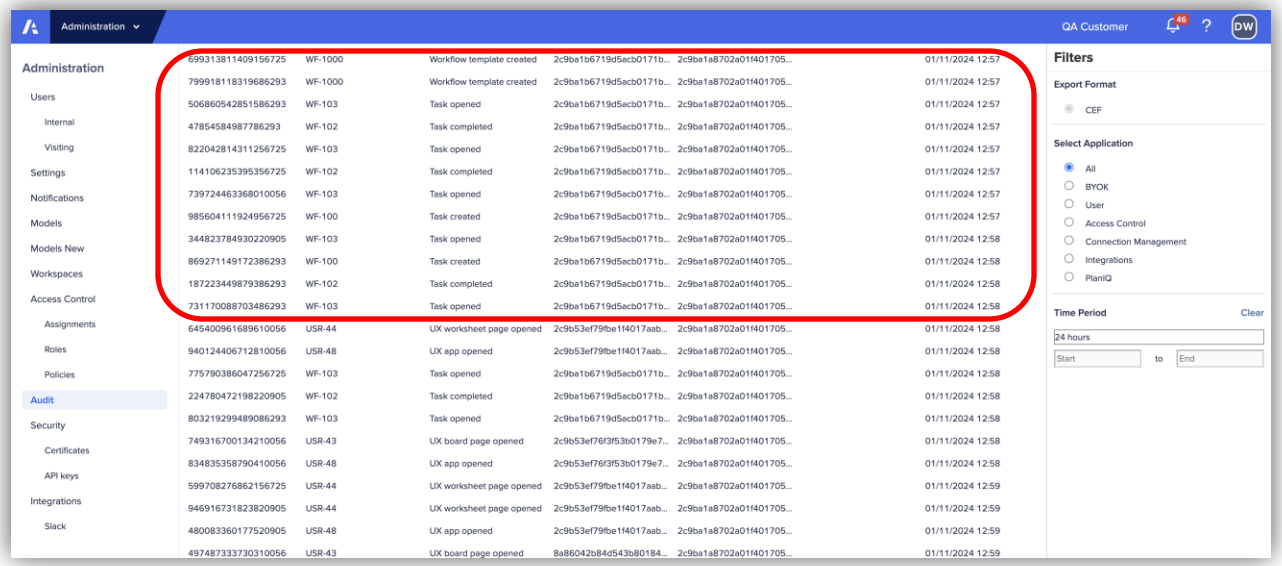
Pillar	Feature	Description	Additional Resources
User Experience	**Force complete steps in Workflow hierarchy tasks**	The ability to force complete sub-tasks in hierarchy Workflows provides Workflow Owners with more control over administrative actions	
	Archive completed Workflow runs	Users who prefer a clean interface may now archive historical Workflow runs. Archived Workflow runs are not deleted	
	Opened and completed Workflow Audit events in Administration	Workflow events for opened and completed tasks are being sent to the central Audit service and are available under Audit in Administration	Anapedia
	Completed Workflow data export	A time-stamped CSV export can be generated for any completed Workflow to provide an audit log of every action that took place as part of a specific Workflow run	
	Notification action recipient increase	When adding recipients to a notification action button, you may now add up to 50 different users. This was previously limited to 20 users.	
	Button icon alignment options	Alignment options allow you to change the position of icons on your buttons to help create a more intuitive experience on your pages, for example when creating “next” or “back” buttons	
	Card toolbar updates	The Card toolbar has been updated to provide consistency across Cards in Boards and Worksheets: • Maximize has moved to the far right of the toolbar on all Cards • Export and other action have moved to the right on expanded Cards in a Worksheet • Info tooltip has been added to all Cards on a Worksheet	

Workflow Audit log in Administration

User Experience

Workflow events for opened and completed tasks are being sent to the central Audit service and are available under Audit in Administration

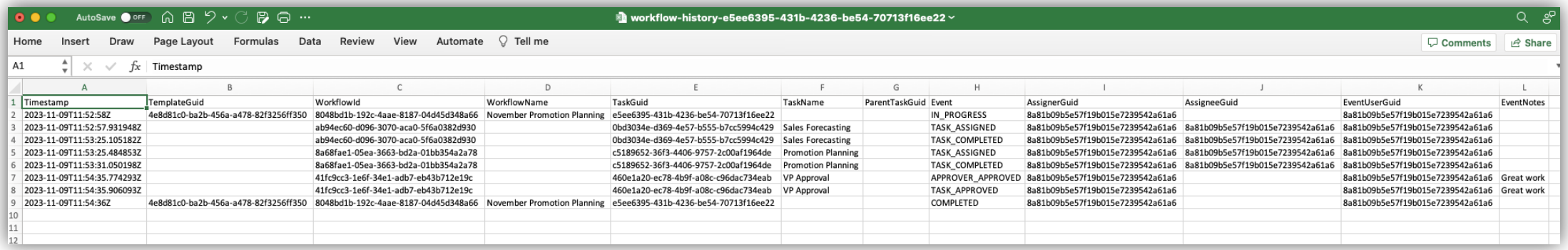
See Anapedia for more details



Completed Workflow data export

User Experience

This time-stamped CSV export can be generated for any completed Workflow to provide an audit log of every action that took place as part of a specific Workflow run



AutoSave OFF — workflow-history-e5ee6395-431b-4236-be54-70713f16ee22

Home Insert Draw Page Layout Formulas Data Review View Automate Tell me — Comments — Share

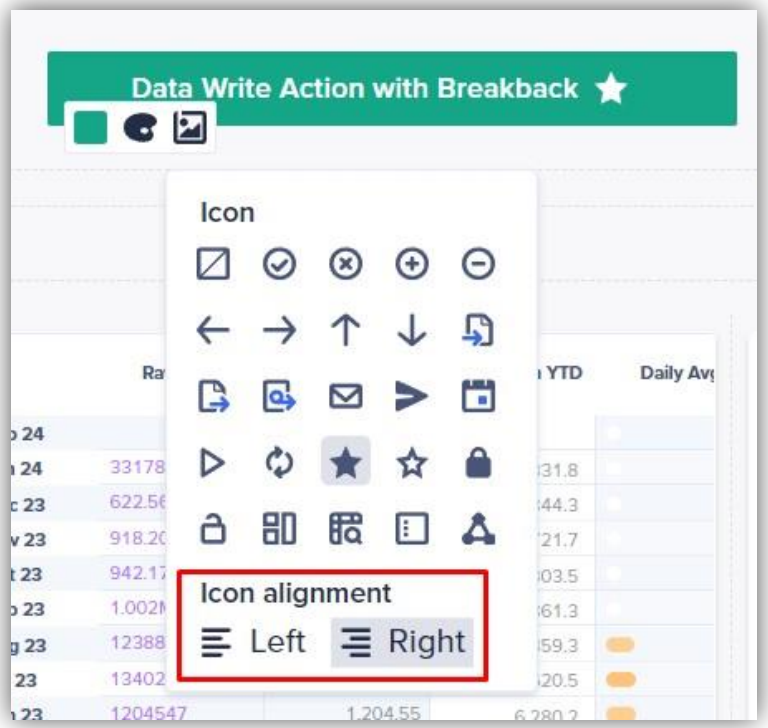
A1 | Timestamp

	A	B	C	D	E	F	G	H	I	J	K	L
1	Timestamp	TemplateGuid	WorkflowId	WorkflowName	TaskGuid	TaskName	ParentTaskGuid	Event	AssignerGuid	AssigneeGuid	EventUserGuid	EventNotes
2	2023-11-09T11:52:58Z	4e8d81c0-ba2b-456a-a478-82f3256ff350	8048bd1b-192c-4aae-8187-04d45d348a66	November Promotion Planning	e5ee6395-431b-4236-be54-70713f16ee22			IN_PROGRESS	8a81b09b5e57f19b015e7239542a61a6		8a81b09b5e57f19b015e7239542a61a6	
3	2023-11-09T11:52:57.931948Z		ab94ec60-d096-3070-aca0-5f6a0382d930		0bd3034e-d369-4e57-b555-b7cc5994c429	Sales Forecasting		TASK_ASSIGNED	8a81b09b5e57f19b015e7239542a61a6	8a81b09b5e57f19b015e7239542a61a6	8a81b09b5e57f19b015e7239542a61a6	
4	2023-11-09T11:53:25.105182Z		ab94ec60-d096-3070-aca0-5f6a0382d930		0bd3034e-d369-4e57-b555-b7cc5994c429	Sales Forecasting		TASK_COMPLETED	8a81b09b5e57f19b015e7239542a61a6	8a81b09b5e57f19b015e7239542a61a6	8a81b09b5e57f19b015e7239542a61a6	
5	2023-11-09T11:53:25.484853Z		8a68fae1-05ea-3663-bd2a-01bb354a2a78		c5189652-36f3-4406-9757-2c00af1964de	Promotion Planning		TASK_ASSIGNED	8a81b09b5e57f19b015e7239542a61a6	8a81b09b5e57f19b015e7239542a61a6	8a81b09b5e57f19b015e7239542a61a6	
6	2023-11-09T11:53:31.050198Z		8a68fae1-05ea-3663-bd2a-01bb354a2a78		c5189652-36f3-4406-9757-2c00af1964de	Promotion Planning		TASK_COMPLETED	8a81b09b5e57f19b015e7239542a61a6	8a81b09b5e57f19b015e7239542a61a6	8a81b09b5e57f19b015e7239542a61a6	
7	2023-11-09T11:54:35.774293Z		41fc9cc3-1e6f-34e1-adb7-eb43b712e19c		460e1a20-ec78-4b9f-a08c-c96dac734eab	VP Approval		APPROVER_APPROVED	8a81b09b5e57f19b015e7239542a61a6		8a81b09b5e57f19b015e7239542a61a6	Great work
8	2023-11-09T11:54:35.906093Z		41fc9cc3-1e6f-34e1-adb7-eb43b712e19c		460e1a20-ec78-4b9f-a08c-c96dac734eab	VP Approval		TASK_APPROVED	8a81b09b5e57f19b015e7239542a61a6		8a81b09b5e57f19b015e7239542a61a6	Great work
9	2023-11-09T11:54:36Z	4e8d81c0-ba2b-456a-a478-82f3256ff350	8048bd1b-192c-4aae-8187-04d45d348a66	November Promotion Planning	e5ee6395-431b-4236-be54-70713f16ee22			COMPLETED	8a81b09b5e57f19b015e7239542a61a6		8a81b09b5e57f19b015e7239542a61a6	
10												
11												
12												

Button icon alignment options

User Experience

Alignment options allow you to change the position of icons on your buttons to help create a more intuitive experience on your pages, for example when creating “next” or “back” buttons



Q
A

How to Reach Success Central

SUCCESS CENTRAL

SuccessCentral@anaplan.com

ReplyToSuccesscentral@anaplan.com

Join and network with peers:

SC Community page

Anaplan

Thank you!

Anaplan