Anaplan

Success Central Monthly Meeting

The Home of Anaplan Scaled Customer Success

23 January 2024

Agenda

01 About Success Central

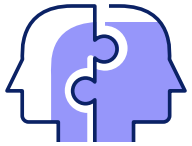
02 Model Building Tips and Tricks

03 Q&A and How to Reach Success Central

Anaplan

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

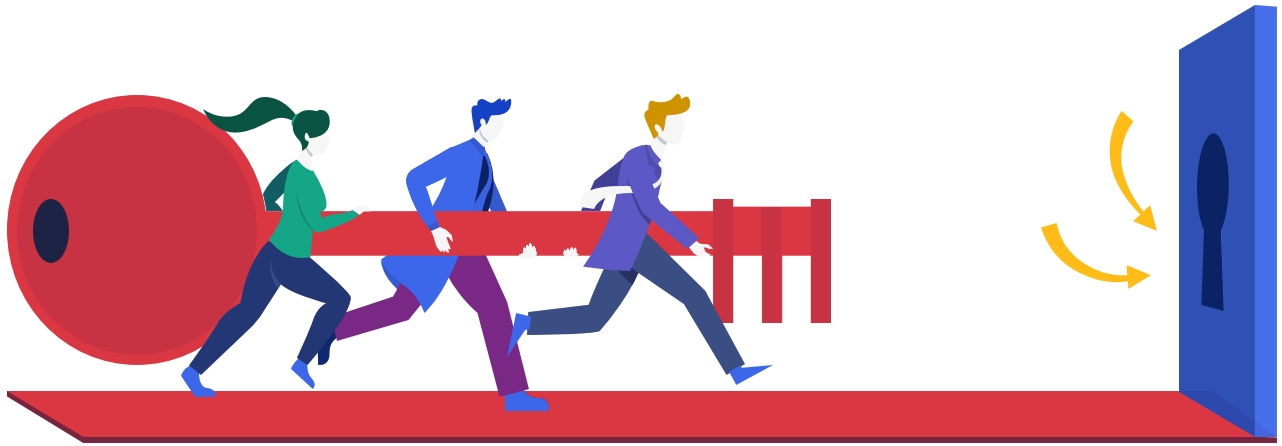
Success Central's Program Components

EXTENDED CS BP AVAILABILITY

TAILORED PLAN OF ACTION

ONLINE COMMUNITY OF PEERS

LIVE WEBINARS & OFFICE HOURS



Anaplan

Guest Speaker

Chris Stauffer
Principal Adoption Platform Specialist

Anaplan

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 solutions and inspiration on how others are using Anaplan plus Academy course help.
- **Programs:** Content and links on Master Anaplanners, Center of Excellence, Community User Advancement, Customer Advocacy, and User Research Program.
- **Resources:** Anapedia, Best Practices, Model Optimization Checklist, Planual, Product releases.
- **Connections:** User Groups, learn about User Personas, and event recordings.
- **Idea Exchange:** The community voice in product roadmap. Create and upvote ideas to improve the platform.
- **Academy:** Free on demand training for every aspiring model builder, solution architect, and informed end user.
- **Support:** Common Issues, Popular Articles, helpful resources
- **2023 Releases:** Click Here.

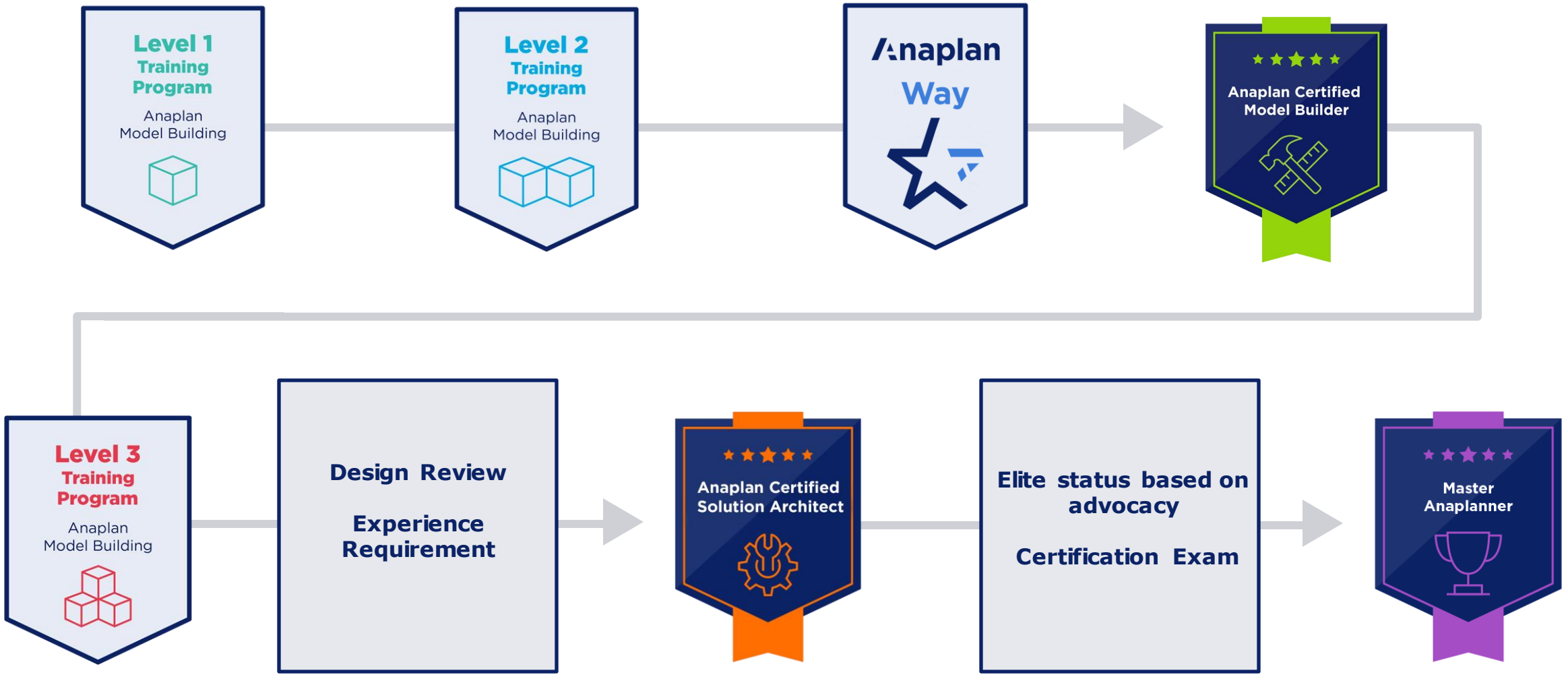
Anaplan Connect: **New York City - March 12**

Anaplan Connect: **San Francisco - April 16**

Anaplan Connect: **Chicago - June 18**

Get started at community.anaplan.com

Anaplan Platform Certification Path



Anaplan

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	

Anaplan

Model Building Tips & Tricks

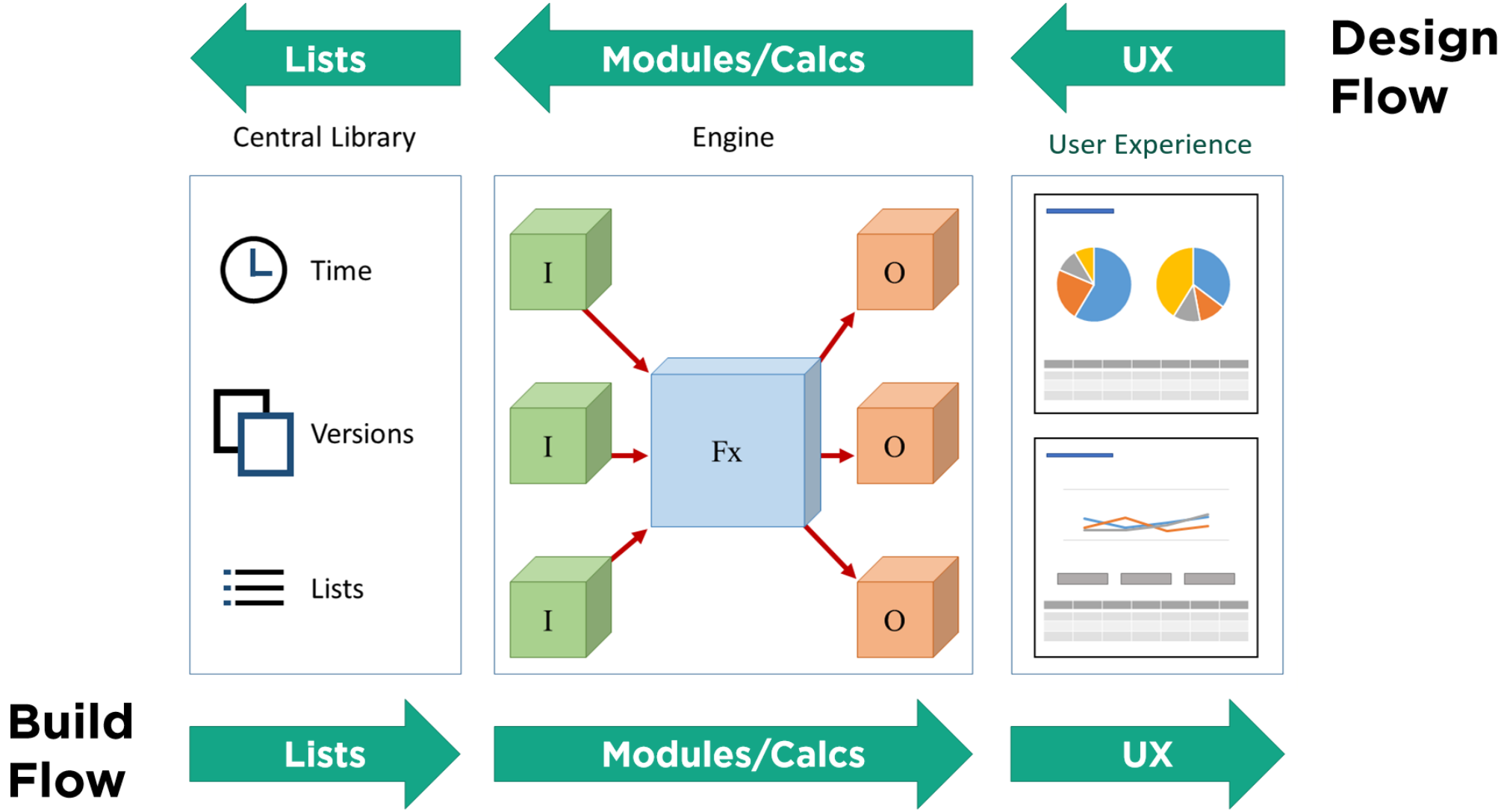
The Model Design Process

Common Ways to Improve Models

Model Optimization Support

Designing Models for User Experience

Anaplan



For training purposes only. Not for use with, distribution or quotation to the general public. ©2022 Anaplan, Inc. All rights reserved. Proprietary and Confidential.

The Model Design Process

1. Understand requirements and the technical ecosystem
2. Plan the end user experience for each role
3. Use the user experience design from the previous step to determine what output modules are needed in the model.
4. Identify what data is available and needed to support the output modules. Determine the data modules the model requires.
5. Identify what inputs from end users are needed.
6. Determine what calculations are needed to transform source data and inputs to the data needed for outputs. Identify the calculation and systems modules needed.
7. Create your model schema
8. Final design check

For training purposes only. Not for use with, distribution or quotation to the general public. ©2022 Anaplan, Inc. All rights reserved. Proprietary and Confidential.

Anaplan Hyperblock

In-memory data storage

Anaplan data store and calculation engine are intertwined giving instantaneous aggregation and calculation.

Calculation engine

Rich multidimensional Java calculation engine with built-in financial and time intelligence.

Hyperblock connectors

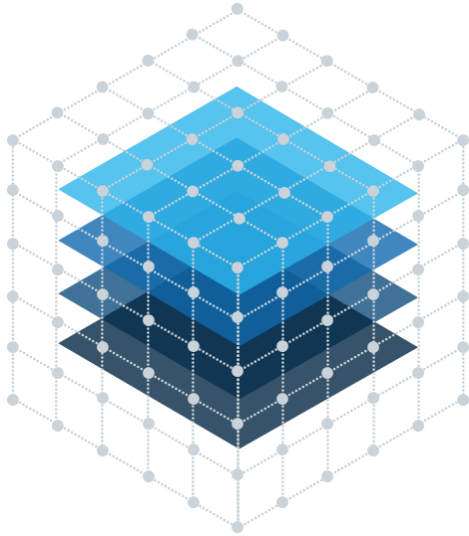
Connect the entire Anaplan model and keep track of every formula, aggregation and cell.

Intelligent aggregation and calculation

Hyperblock Connectors constantly monitor the model.

When data is entered into Anaplan, only dependent and precedent cells are calculated.

Patent #8151056



Multi-Dimensional (OLAP)

Structured Queries (DB)

Customizable Experience (Spreadsheet)

SaaS Cloud Native

- Vertical and Horizontal Scalability
- No client-side Hardware
  No Installation
- Anaplan performs platform maintenance
- Always the latest released version
- 99.5% Availability SLA

Web UI

- Single Unified Web UI
- Browser delivered to Users and Admins
  HTTPS (TLS1.2)
  (HTML5 compliant browser – no add-ins)
  Low Bandwidth .2-.4mbps
- IOS / Android Apps

NOTE : This presentation is subject to Anaplan's policies and standard terms which shall take precedence at all times.

Formula Structure drives performance

- DISCO PLANS Methodologies
- Avoid formula repetition: use System modules to hold formulas used multiple times
- Break up the most complex formula
- Break up any formula you can't explain the purpose of in one sentence
- Turn off unnecessary Summary method calculations (Default setting off as of July 2023)
  - Is the calculation user facing?
  - Is the line item referenced by another detailed calculation line item
  - Is it a calc or staging module?
  - Can you have different summaries for time and lists?
- Calculate over the Fewest Number of Cells
- Optimize Conditional logic for earliest and most efficient exit

Model Optimization Checklist (Samples)

- Avoid using FINDITEM() and when used, wrap in an IF/THEN/ELSE
- Avoid Daisy Chaining
- Minimize text
- Separate SUM and LOOKUP functions into two line items
- Breakdown nested formulas into multiple line items
- Overdimensionalization?
- Etc. check out the check list!

For training purposes only. Not for use with, distribution or quotation to the general public. ©2022 Anaplan, Inc. All rights reserved. Proprietary and Confidential.

Proactive Model Optimization

Tools and strategies utilized to maintain model optimization throughout a build and beyond

Planual

- ✓ The Planual provides a systematic set of standards for model building on the Anaplan platform.
- ✓ The rules are designed to produce efficient, scalable models dramatically increasing performance of models.
- ✓ Model Optimization Checklist

MAPS/MAT

- ✓ MAPS/MAT tools highlight Planual infractions, citing specific line items for improvement, and estimating model open times.
- ✓ MAPS (Model Analysis Proactive Solutions) for models with size up to 130 GB.
- ✓ MAT (Model Analysis Tool) for hyper models beyond 130 GB. Requires Anaplan WSA access.

Hypercare

- ✓ Anaplan's premium support service dedicated to aiding customers in their Anaplan journey via high-touch, concierge-style care.
- ✓ Provides various usage KPI for models of client companies.
- ✓ Performance, Activity, concurrency, security related information with weekly updates.

Q
A

How to Reach Success Central

SUCCESS CENTRAL

SuccessCentral@anaplan.com

ReplyToSuccesscentral@anaplan.com

Join and network with peers:

SC Community page

Thank you!

Anaplan