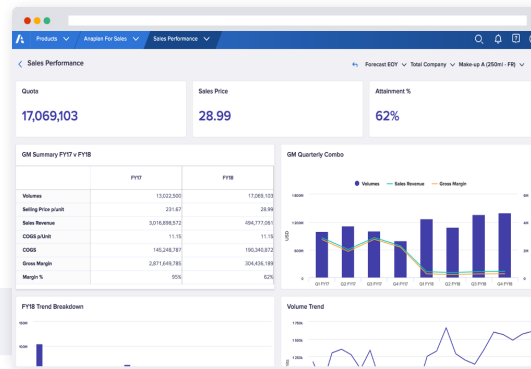




Retail Bank Omnichannel Planning

BANKING

Anaplan's Retail Bank Omnichannel planning solution provides a comprehensive set of functionalities to operationalize retail banks' digital transformations, plan for the future of the branch network and workforce and model out branch repurposing scenarios across all channels to measure impacts on customers, employees, revenues and costs. The solution addresses a large set of use cases : retail branch planning and repurposing, channel optimization, contact centre planning and workforce planning.



There's a better way to plan

Leverage the combined power of technology and people to make the most of the natural connections that exist within your organization.

Connected Planning helps sales leaders use the best available data to make better- informed decisions.

Dynamic: Change plans at the speed of the customer.

Collaborative: Get the right people involved in decision-making.

Intelligent: Leverage internal and external data to unlock predictive insights.

Key benefits

- The solution enhances transparency on branch-level profitability and costs and helps improve cost-to-income ratios
- It drives higher NPS and improved customer retention, increases sales conversion and customer satisfaction
- Finally, the solution informs retail banking leaders as to open, close or repurpose branches and optimize capacity to match customer demands across channels

Customer story



Leading UK bank offering consumer, commercial and private banking services to 19 million customers

Struggling to run intra-day, short and longer term contact center forecasts, the bank needed statistical forecasting and scenario planning capabilities to better understand root causes of issues, mitigate risk and ensure continuity.

Benefits

- Optimized scenario planning and analysis of historical events.
- Improved forecasting speed and efficiency.
- Optimized capacity by faster root-cause problem solving.
- Improved webchat and secure messaging forecasts

“With Anaplan, we anticipate and proactively respond to market changes so we can look forward with confidence”

– Head of Workforce Optimization

Key features and capabilities

Retail Branch Planning & Repurposing

- Strategic Modeling of the future of the branch network - openings, closures and repurposing – aligned with the Bank's location strategy
- P&L forecasting across the branch network
- Consolidation of branch P&L plans

Contact Center Planning

- Contact center resourcing and planning , based on branch strategy, network traffic and service level agreements.
- Statistical forecasting to optimize supply and demand planning
- Planning at an intra-day level, SLA and NPS monitoring through skills and capacity rightsizing

Channel Optimization

- Aligning FTE capacity across distribution channels
- Forecasting of FTE and financial impacts of a transfer of branch channel resources to digital or contact center channels

Workforce and Talent Planning

- Allocation of strategic workforce targets through the branch network
- Strategic initiatives published to branch managers, linking strategy with operational execution
- Planning for the future of the workforce and talent acquisition

Scenario Modeling and Analysis

- Profitability, workforce and contact center impacts of branch openings, closures or repurposing
- Scenario modeling of FTE demand based on branch activity analysis
- What-if scenarios based on market or organizational changes
- FTE and financial impacts of the launch of a new product (for instance remote mortgages)

Key features of the Anaplan platform

Planning at Scale, Enterprise-grade scale with a cloud native platform and patented in-memory Hyperblock engine.

Voice to Your Data, One location for all of your planning data that is trusted, connected, and the latest.

Runs Your Business, Unmatched flexibility to model any scenario for the business and by the business.

A Team Sport, Engaging, collaborative, and actionable user experience.

Safeguarding Your Present and Future Robust protection through: user access, identity management, and data encryption.

Your Competitive Advantage Embedded intelligence and optimization to drive insights that matter.

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 1,600 customers worldwide.

To learn more, visit [Anaplan.com](https://anaplan.com)



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