Amplifying the power of your Anaplan Investment

OCTOBER 2022
Many global organizations that Deloitte works with have made a significant investment in the Anaplan platform to provide end-to-end decision-making capabilities across business functions (e.g., Operations, Commercial, Finance). These organizations view Anaplan as a key enabler to understanding changing market conditions through the real-time modeling of multiple scenarios that that require many functions to provide critical inputs. Moreover, these organizations are continuously looking for opportunities to introduce new capabilities and insights for the business to achieve strategic objectives and build a competitive advantage.

To support these goals, organizations are shifting the way they roll out new Anaplan capabilities – pivoting from implementing siloed capabilities via “projects” to operating more cohesively across functions with a more coordinated “product” mindset. As organizations expand their usage of Anaplan - from more tactical/block and tackle use cases to truly connected planning - their internal support models must evolve to ensure adequate scalability and agility.

The objective of this paper is to demonstrate how, if structured correctly, an Anaplan Center of Excellence (CoE) can be a key enabler of helping organizations unlock the power of the Anaplan platform.

How Anaplan COEs are evolving to unlock greater value for organizations
Anaplan is a key enabler of broader connected planning

Organizations are investing in Anaplan to provide end-to-end decision making and connect functionally-siloed planning to enable more real-time modeling against strategic growth imperatives.

As the capabilities being delivered and scope of business impact expands, organizations need to ensure the way they support Anaplan also matures, in terms of three key areas:

1. The Remit of the CoE
2. The Structure of the CoE
3. The Roles of the CoE and Talent Strategy

FUNCTIONAL PLANNING MODELS

X-FUNCTIONAL PLANNING CLUSTERS

ENTERPRISE BUSINESS PLANNING

MORE CONTEMPORARY AND INTEGRATED ANAPLAN FOOTPRINTS
To be effective, Anaplan CoE’s must drive coordination across tactical support, implementation of new use cases, and helping steer and scale the organization’s connected planning capabilities.

Historically, Anaplan CoE’s have focused on providing KBR or BAU services for specific Anaplan applications, and potentially leading or co-leading the implementation of small bolt-on use cases.

However, as Anaplan is used more broadly, across a broader set of stakeholders, in a more connected manner, the remit of the CoE is maturing up the value to chain, to include supporting broad scale process improvement as well as helping the organization utilize Anaplan in a more strategic, scalable way.
As the CoE’s remit and focus expands, we are seeing organizations leverage both central and federated CoE teams together

At organizations that have more focused use of Anaplan, it is not uncommon for their CoEs/support models to be more federated, and reside within the individual business(es) that are utilizing Anaplan for planning. At some clients, where a specific functional CoE is more mature but the use of Anaplan is expanding, that more mature CoE may de-facto operate as the central CoE, supporting smaller/less mature federated teams.

However, as organizations utilize Anaplan in more strategic ways, we are seeing our clients set up Central and Federated CoE teams more proactively and thoughtfully, with transparency on roles, responsibilities, governance and operating model.

### COE Structure – Central Team and Federated Team Collaboration Model

#### CENTRAL TEAM
Enterprise Product and Capability Ownership

- Connected Planning Vision and Roadmap & related business case support
- Integrated Ecosystem (Data Hubs, data & meta data definitions, integration approach)
- Model Build Standards (design, user experience, best practices)
- Federated COE Support (Solution Architecture, Agile/PMO best practices, testing best practices, change management best practices)
- Platform Management (release scheduling, communication on platform updates, vendor relationship management, tenant management, centralized technical capability (SSO, BYOK, etc.)
- In some cases, model build and/or KBR/BAU may be centralized under the Central CoE

#### FEDERATED TEAM
Integrated Product and Project Management

- End to end project management integrated with other function/enterprise projects
- Integrated project delivery, aligned to central CoE standards and governance
- Business process transformation
- Solution design, build and test, aligned to enterprise-wide best practices, data hub(s) and integration standards (as relevant leveraging central CoE technical resources)
- Organizational Readiness & Adoption for new applications
- Product ownership for capabilities (backlog management, L1 end user support, communications with end users on releases, downtime, etc.)
- May also have dedicated KBR/BAU model builders

Close coordination between federated and centralized CoEs provide both the tactical control a project needs and the strategic reach an entire organization requires.
As organizations seek to leverage Anaplan more strategically, and the CoE’s remit expands, the roles and skill sets needed with the CoE are also evolving. What used to be a smaller team of mostly technologists supporting end users “Keep the Business Running” (KBR) and “Business as Usual” (BAU) to defect triage, develop small enhancements, or implement function-specific “projects” is no longer adequate. Specifically, more strategic Anaplan CoEs require a blend of Business, Technical, Product, Project, and Change Management team members to support a product approach to Anaplan.

### The Roles of the CoE and Talent Strategy

As organizations seek to leverage Anaplan more strategically, and the CoE’s remit expands, the roles and skill sets needed with the CoE are also evolving. What used to be a smaller team of mostly technologists supporting end users “Keep the Business Running” (KBR) and “Business as Usual” (BAU) to defect triage, develop small enhancements, or implement function-specific “projects” is no longer adequate. Specifically, more strategic Anaplan CoEs require a blend of Business, Technical, Product, Project, and Change Management team members to support a product approach to Anaplan.

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<tr>
<th>TYPES OF ROLES</th>
<th>ESTABLISHED COE ROLES</th>
<th>EMERGING COE ROLES</th>
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<td>Data Scientists</td>
<td>or collaboration with central analytics teams</td>
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This list of roles, and the number of resources needed within the CoE should be tailored depending on the number of use cases an organization has, the complexity of the overall environment, and the organization’s connected planning aspirations. However, regardless of your planning scope and scale, it is important to recognize that some aspects/activities of all these roles are critical to drive successful planning. Deloitte’s recommendation to ensure a CoE’s agility and scalability is to start with a more holistic set of roles/responsibilities and from there, determine which people/roles will own these activities and what the trigger points would be required to continue to add unique positions to the CoE.
Organizations are increasingly adopting hybrid internal/external CoE talent strategies, to help keep pace with the demand, de-risk their programs, and drive accelerated value.

There is no one-size fits all approach to a CoE

As an organization’s vision for and usage of Anaplan evolves, the construct of the CoE should evolve as well. However, planning for the CoE should be a forethought, not an afterthought.

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*Anaplan technical roles indicated in bold

Illustrative CoE Plan

Phase 1: Foundational Structure

- Establish COE as the first use case goes live and when a roadmap of opportunities are available

  Establish Governance Structure
  - Designate COE Executive Sponsor
  - Designate COE Lead
  - Identify Functional Product Owner
  - Establish Model Builders and Data Architects
  - Identify IT Data Architect who will support data integration feeds for Anaplan

  Establish Governance Cadence
  - Monthly COE Update to Executive Sponsor
  - Quarterly Strategy Update to leadership team

  Establish Release Schedule
  - 2 to 3 week sprint cycles
  - Sprint review, Regression testing, UAT and Deployment

Phase 2: Centralized COE to support multiple use cases

- Establish Phase 2 when a couple of use cases are live and additional use cases are in-flight with a need to be transitioned to the COE

  Establish Data Governance
  - Work closely with IT Data Architect and Enterprise Architect, as we expand data sources outside of one use case

  Establish Business Process Owners
  - Identify business process owners who will provide functional support for multiple use cases

  Centralize User Provisioning
  - Manage security controls and centrally manage provisioning of the application
  - Manage admin licenses

  Centralized Solution Architect
  - Provide design standards and guidance across use cases
  - Model sizing/workspace requirements for additional use cases

Phase 3: Scale COE for Enterprise-Wide Planning

- Establish Phase 3 when Anaplan expands to an enterprise-wide planning platform with 5+ use cases

  Communicate to broader Organization
  - Anaplan established as the enterprise-wide planning platform for any planning use case
  - 5+ use cases in Anaplan

  Expand COE team
  - Expand technical and functional team to handle 5+ use cases in Anaplan

  Advanced Vendor Relationship with Anaplan
  - Stay current on new functionality through early adopter program
  - Refresh team’s knowledge through regularly updated Anaplan Enablement courses
Benefits of Using External Resources

Leveraging external resources to catalyze an internal CoE, ongoing co-sourcing or fully outsourcing a CoE helps organizations improve the outcomes of and de-risk their Anaplan investment.

Flexibility
Ability to meet shifting resource demands around the clock

Technical & Functional Expertise
Technical accelerators and experienced teams wielding leading practices help build and grow capabilities.

Risk Mitigation
Resource continuity and management without handoffs eliminating gaps and opportunity risks

Scalability
Access to ad-hoc support that could be needed to supplement internal resources and provide ongoing external points of view

Market Awareness
Insight on how other companies are utilizing the platform to improve planning and technical advances in the platform

Advocation
Deloitte collaborates with Anaplan on high-impact platform updates addressing client feedback

Case Studies & How Deloitte Can Help

We can partner with you in a variety of ways throughout your CoE journey.

Utilize External Support for Internal CoE Enablement/Set up
At a large multi-national retailer with a single use case, a Deloitte project team completed a multi-phase implementation, and during a 6-month transition, set up the operating model, intake processes and tools and enabled internal client resources to run the function-specific CoE. The roles enabled within the CoE included Product Management, Change Management, Project Management, and model building capabilities. While the CoE is driven by the customer, the project team connects monthly to support CoE questions on more complex builds and retain understanding of the application to support broader capability deployment.

Client-Owned Central CoE enabled with outside support and Externally Supported Federated CoE
A fast-growing software company recognized that they had small independent and unconnected use cases and CoEs across the organization which could benefit from an overall strategy. Deloitte supported the organization to articulate the overall organizational connected planning vision and roadmap and set up the operating model for the central and federated CoEs. Deloitte supported capability building within the central CoE, to support an internally owned CoE, more fully supports one of the functional CoEs to build net new capabilities and provides functional advisory support to the other functional CoE, while helping ensure alignment across the organization to the vision and roadmap.

Deep-Dive Solution Architecture Review and Specific Remediation and KBR Support
A technology company had built their Anaplan application with little outside support and was concerned about the scalability of the platform to meet its ongoing aspirations. Deloitte supported the client to do a deep dive architectural review, identify the technical debt and design updates needed to drive extensibility aligned to their vision, and provide scaled back KBR/BAU support to address these updates so their internal CoE team could continue to build net new capabilities.

Fully Co-Sourced CoE Capabilities
A global publisher, developer and distributor of interactive entertainment software, hardware, and accessories worked with Deloitte to deploy Anaplan globally across multiple use cases spanning multiple functions – Commercial, Finance and Marketing teams. From the onset, the client saw Anaplan as a key business enabler and contracted a long-term support structure from Deloitte to drive a shared/co-sourced COE within IT. This collective team supports end-users, enhances and maintains the existing application, and provides “surge up” capacity as needed to support project teams in a cohesive manner.
2022 marks the eighth consecutive year that Anaplan has named Deloitte its Global Partner of the Year. We have driven Anaplan-Enabled connected planning across hundreds of companies, and provide ongoing support to many of these clients.

For companies looking to transform planning, improve agility, and drive greater end to end collaboration, visibility and accuracy, it is helpful to take pause and assess how you can garner greater ROI from your the investment in Anaplan. And regardless of if your organization has a clear vision for connected planning, or are trying to get there, its important to consider how the structure your CoE will need to evolve to support that vision.

Please reach out to learn more about how Anaplan CoEs, when structured correctly, can help you unlock greater value:

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Deloitte is the #1 global Anaplan partner

Deloitte became Anaplan’s first alliance. We’ve been awarded Anaplan’s “Global Partner of the Year” - for the past eight years - in recognition of our truly global Anaplan practice.

500+ Successful Anaplan implementations

100+ Powered by Anaplan Solutions

750+ Anaplan Consultants

28 Countries with dedicated Anaplan practices

Awarded Anaplan’s Global Partner of the Year

THE VALUE THAT WE DELIVER TO OUR CLIENTS

Global leadership
While we have Anaplan practices in over 28 countries, we have operate as a global practice and share the combined experience to deliver exceptional solutions for our clients

Local expertise
We have in-market Anaplan capabilities in the majority of the countries that our clients do business, which allows for us to provide the full spectrum of development and deployment services

Functional Expertise
We provide functional experts across all industries and use cases (e.g., Finance, Commercial, Supply Chain) that allow us to deliver a complete functional and technical solution for our clients

Ongoing Support and Enhancements
For many of our clients, we provide ongoing support of their Anaplan systems and support ongoing enhancements for a very competitive price

2015 TO 2022 GLOBAL ANAPLAN PARTNER OF THE YEAR
Partnering with you across your Anaplan Journey

Deloitte partners with our clients through every phase of an Anaplan journey

1. Demonstrating Value
   - Stakeholder Alignment
     including functional and cross functional connected planning labs, strategic vision alignment and road mapping, and governance model design
   - Business Case Development
     including metrics, baselines, and anticipated timing of returns
   - Proof of Concept Development

2. Improving Speed to Value
   - Organizational Readiness
     • COE Best Practices and Set Up
     • COE Model Builder Enablement
     • Business Super User Enablement
   - Anaplan Implementation
     • Future state process design, MVP definition and release plan, System solution architecture
     • Leveraging Deloitte Accelerators/Solutions
     • Plan & Build: User stories, agile development, QA and Unit testing
     • Test: Testing prep, offshore testing COE
     • End-User Readiness & Adoption

3. Operating at Scale
   - Management Services
     Owning and driving business processes via Anaplan Applications or owning full COE resources
   - Application Co-Sourcing
     • Dedicated project resources to address roadmap of projects across project management, solution architecture, model build, integration, testing and/or change management