



Forecasting the Future to Win

SOLVING THE PLANNING, REPORTING AND ANALYSIS CHALLENGES FOR BUSINESSES



Anaplan
Partner

Gold

LIONPOINT

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The technical challenges facing FP&A teams

FP&A teams are under constant pressure to provide high quality, real time information to enable decision making.

Business leaders depend on information provided by FP&A to make operational, strategic and tactical decisions and require accurate insights based on the analysis of data from multiple sources. Reliable and informed decision making is only possible when FP&A teams have visibility across departments and business functions in real time.

The ability for organizations to navigate uncertainty has been brought into sharp focus with recent global events. The need for FP&A teams to run multiple scenarios based on dynamic assumptions and keep pace within a rapidly changing business environment has never been greater.

Lionpoint partners with Anaplan to enable firms to integrate data, automate processes, drive dynamic real-time updates to calculations and streamline their planning and forecasting.



The technical challenges facing FP&A teams

OVER-RELIANCE ON SPREADSHEETS

FP&A teams often depend heavily on spreadsheets. This over-reliance poses a major risk to businesses, resulting in issues with data security, version control and reporting errors. Long planning cycles, data validation and consolidation of disparate spreadsheets also mean multiple versions of the plan need to be created, reviewed and approved. FP&A teams find themselves focused on lower value work, such as reconciling and aggregating data from multiple models, fixing spreadsheets and developing reporting workarounds, rather than generating analysis and management insights.



The technical challenges facing FP&A teams

LEGACY SYSTEMS AND SCALABILITY

The implementation time for technology in finance is often extremely lengthy. The legacy software available to FP&A teams tends to be inflexible and addresses only parts of the organization's requirements. Relying on IT to make any necessary changes hinders the ability to rapidly scale and adapt reporting as the business grows. Finance and FP&A teams struggle to adopt leading best-practices, such as driver-based planning, rolling and predictive forecasting, scenario modeling and variance analysis, making it difficult for organizations to anticipate and react quickly to changing market conditions.



The technical challenges facing FP&A teams

DATA MANAGEMENT

Having one source of truth is critical to producing a complete picture for the business. Combining and rapidly aggregating data from multiple source systems is often not feasible in Excel based models, leading to multiple sources of truth and the inability to accurately compare how the business has performed to the original plan. Combined with siloed departments and teams, it is difficult to see the impact of decisions made by one team on the entire business until all information is consolidated.





Anaplan:

Orchestrating planning with one platform

Successful and resilient planning is dependent on key capabilities including accuracy, speed, flexibility, visibility and collaboration.

Combining the flexibility of a spreadsheet, the scalability of a database and rapid calculation speed in a single cloud-based solution, Anaplan's multi-dimensional platform has a wide range of use cases for FP&A. This enables executives to view scenario analyses in real-time at any level in the organization, whether by geography, department, or cost center. Its ease of use and flexibility allows it to be tailored to the requirements of the business.

How does Anaplan help evolve your current operating model?

1

Anaplan works across your entire business

by connecting people, data and plans to create a line of sight for collaborative, agile and IT-independent modeling and decision making. From top-down target setting to bottom-up revenue and Opex planning, centralized drivers, assumptions and allocations can be managed in one central cloud-based App.



2

Anaplan can plug into any existing ecosystem

via its flexible data model and calculation engine, connecting and unifying your ERP and Workforce Planning solutions to empower the entire organization with a single data ecosystem.



How does Anaplan help evolve your current operating model?

3

Anaplan complements your existing technology options

as it integrates with your foundational systems and combines traditionally offline data sources, such as Excel. Anaplan de-risks modeling processes through applying a common framework across the organization and seamlessly updating actuals with source system data feeds, whilst ensuring high data security standards and configurable user access controls.



4

Anaplan is a cloud-based, scalable digital platform

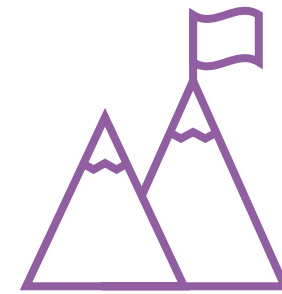
that sits across your core systems and provides a centrally connected source for all planning, forecasting and modeling. Anaplan provides a simple user interface with familiar Excel-like functionality. Internal and external teams can access the software collaboratively and make data-driven decisions in real time.



The client: Private Equity Firm

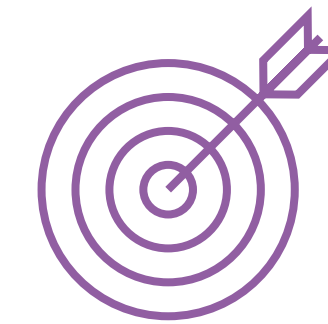
Budgeting and Forecasting for Private Equity

CASE STUDY



The Challenge

- › Basic Excel planning with limited ability to produce meaningful reporting and metrics.
- › No integration with source systems and so combining actuals and forecast views were manual and challenging.
- › Separate spreadsheets for workforce planning, Opex forecasting and fee forecasting.



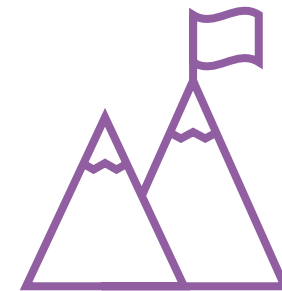
The Impact

- › Creation of a central planning tool for workforce planning, compensation management and FP&A.
- › Ability to compare planning scenarios combining actuals and forecasted views for Income Statement, Balance Sheet and Cashflow reporting.
- › Ability to plan and report in multiple currencies.
- › Time savings in planning cycles and the ability to report in real time to management team; enabling more informed decision making.

The client: Financial Services Firm

FP&A Budgeting, Forecasting and Reporting

CASE STUDY



The Challenge

- › Time-consuming budgeting and forecasting process combining planning inputs from multiple geographies and departments in multiple currencies.
- › Difficult to aggregate all cost center data from a legacy ERP and apply complex rules to map data into Management Reports and combine with forecasts.
- › Siloed reporting processes with FP&A and Operations teams using different KPIs to measure business performance and make operational decisions.



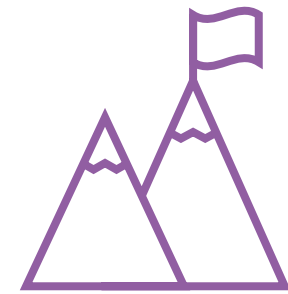
The Impact

- › Lionpoint implemented an Enterprise Anaplan solution for the client's FP&A process, with complete integration with source systems.
- › Reduced time spent for actuals reporting and planning cycles across the organization, allowing time for more strategic analysis of results and variance reports.
- › Real-time reporting for management and executive teams.

The client: Global Investment Management with over \$570 Billion in AUM

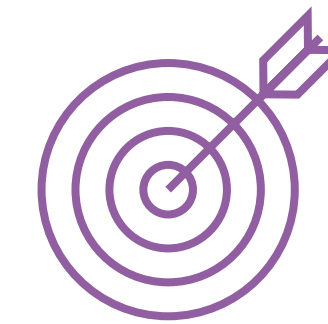
Cost Allocations

CASE STUDY



The Challenge

- › Very manual Excel based process with limited validation and data security.
- › Lack of visibility in understanding how allocations are derived.
- › Lengthy and time-consuming process, which required a lot of manipulation to load results back into client's finance system.



The Impact

- › Ability to store large amounts of data from disparate sources with a single process.
- › Anaplan user interface designed to allow for improved data validation, highlighting validation issues to allow for correction.
- › Full auditability with ability to drill down from given from output, through to calculation and base data.
- › Significantly reduced time required to run cost allocation process.
- › Anaplan assured security and data integrity providing auditability for the outputs.

Transform your operating model with Anaplan and Lionpoint

Lionpoint is a global consulting firm with market-leading expertise and experience to help alternative investments and financial services organizations gain operational and technology efficiency. We help our clients transform their operating models and successfully select, implement, enhance and integrate innovative technology solutions throughout the front, middle and back offices.

Lionpoint is a global Anaplan Gold Partner. Gold-tier status recognizes a partner's ability to drive high-value transformation and deliver exceptional customer success. Lionpoint's expertise with Anaplan includes its own IP in the implementation and integration of Anaplan's technology into existing technology systems of client organizations.

Anaplan models address company FP&A requirements, budgeting and forecasting, cost allocations and financial reporting.





START THE CONVERSATION WITH LIONPOINT

Get in touch for a conversation to discuss your organization's circumstances.

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The Anaplan solution is dependent on the organization's strategy and existing technology stack.
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