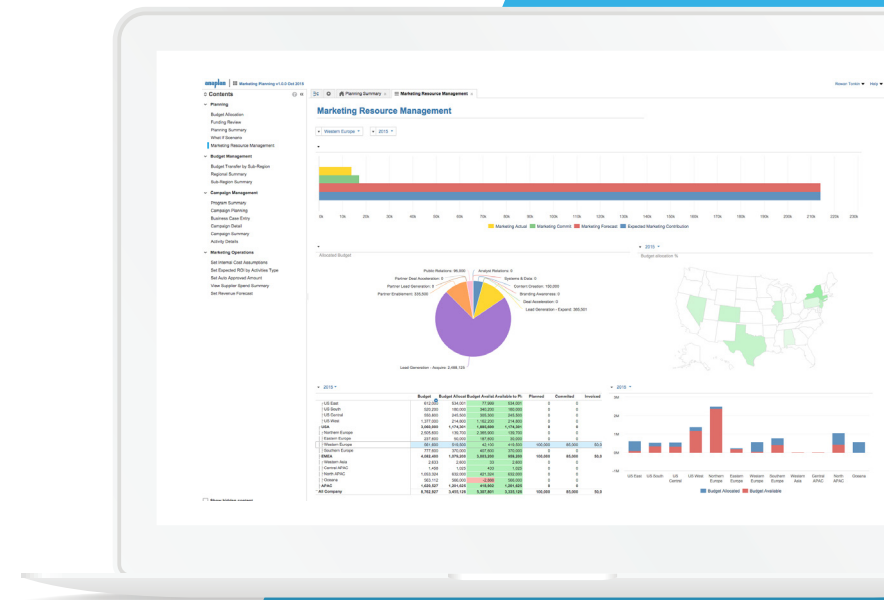




Marketing Resource Management

Plan and optimize marketing spend using sales and service insight to create higher ROI from marketing activity. Define and track campaigns and budgets with instant visibility into predicted revenue generation based on historical campaign performance metrics. Control spend easily with access to budget, planned, committed, and actuals across your departments, territories, and products.



Centralize budget management and spend tracking.

Gain control of your budget process with top-down planning and bottom-up spend and forecast tracking. Understand your budget position in real time and easily reconcile with Finance.

Optimize plans, resources, and budget.

Build your marketing plan, then optimize the plan across key drivers to ensure maximum impact for your spend.

Forecast marketing revenue generation for immediate revenue alignment.

Focus your marketing plans on revenue generation by leveraging historical sales data to forecast revenue in real time. Deliver fast and accurate revenue projections to align to corporate objectives.

KEY BENEFITS

- Reduce administrative overhead on marketing by centralizing planning, forecasting, and optimization capabilities
- Allocate and focus marketing investment on high-return activities
- Provide insight to align corporate objectives and sales strategy
- Demonstrate the value of marketing to the business by showing the impact each and every marketing activity has on revenue generation
- Understand the impact of changes to marketing performance metrics on the revenue forecast

Aberdeen Group

“89% of companies are still using spreadsheets in planning, budgeting, and forecasting processes.”

SiriusDecisions

“86% of B2B marketers don’t have an integrated marketing and sales planning process.”

Key Features

Top-down budget allocation

- Set top-level marketing budget and allocate across geographies, products, channels, and other hierarchies with direct insight into corporate revenue targets
- Connect planning across Finance, Sales, Operations, and HR

Tiered bottom-up campaign planning hierarchy

- Plan, budget, and report across the real marketing activities within the business by utilizing a comprehensive campaign hierarchy with roll-up capability for resources, budget, spend, and results
- Define Program, Campaign, and Activity types to monitor your marketing strategy Define spend at each level with monitoring of each budget position and allocations through the campaign hierarchy

Budget approvals & delegation of authority models

- Enable pre-approved spend thresholds to improve budget compliance
- Create thresholds based on various drivers, including activity type, calculated ROI, or percent of budget available

Spend Tracking

- Understand your marketing budget position in real time

- Spend against campaigns by utilizing your finance codes to allow for simple periodic reconciliation
- Record commitments and actuals directly into the application or integrate with finance systems
- Visualize burn down charts of how commitments are being fulfilled over time
- Support for plans in different currencies
- Break-back entry shortcut (historical, seasonal, 4-4-5) for fast, accurate plan calculation and updates

Revenue calculation drivers

- High-level planning drivers during annual planning predict a forecasted revenue contribution
- Create detailed campaign plans, then calculate a granular contribution based on channel, objective, and product

Salesforce integration

- Import Salesforce accounts and opportunities, and create revenue forecasts quickly and easily based on historical campaign and opportunity data

Modeling, analysis, and “what-if”

- Quickly create, share, and compare scenarios and “what-if” analysis on key marketing and sales performance metrics
- Unlimited “what-if” scenarios for proactive insight and better choices for immediate and longer-term impact

- Periodic or rolling forecasts using “copy version” that quickly automate combining data from previous plans, budgets, and actuals
- Marketing revenue contribution forecasting to model and see revenue impact of potential decisions before they are made

Reporting and dashboards

- Pivot reports by any dimension (time, geography, product) for custom, no code, views on-the-fly
- Visualizations add relevance and at-a-glance understanding of data with maps, charts, graphs, waterfall, alerts, and more

Data integration with other systems

- Flexible options to match customer needs: Anaplan Connect, APIs, MuleSoft, Dell Boomi, or SnapLogic
- Fast and easy import/export via spreadsheet

Microsoft Office™

- Microsoft Office add-ins for seamless plan and report export to Excel® workbooks, PowerPoint® presentations, and Word® report books
- Enter budget offline via Excel add-in, accurately and automatically pushing back into Anaplan with a click

Audit trail

- Track and review history of versions, scenarios, and user activity

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 1,500 customers worldwide.

