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The Center of Excellence Health Check: taking a pulse on the impact of Connected Planning

Organizations using **Anaplan's Connected Planning platform** understand the value of bringing together people, data, and plans to help accelerate business performance. But for Connected Planning to succeed, organizations must commit to building stronger connections from within.





Establishing a **Center of Excellence (CoE)** helps solidify an organization's investment in Connected Planning and hold itself accountable, while also forming and maintaining a support system that can help maximize return on investment (ROI) and unlock the full potential and power of Anaplan's platform.

But implementing a new CoE or improving an existing one can be challenging. That's why Deloitte created the **Center of Excellence Health Check**, which provides a guided offering for organizations aspiring to or currently using Connected Planning. The CoE Health Check is designed to accurately and quickly measure CoE performance, effectiveness, and value, ultimately helping determine improvement opportunities that support business requirements and long-term success.

Maximizing Connected Planning

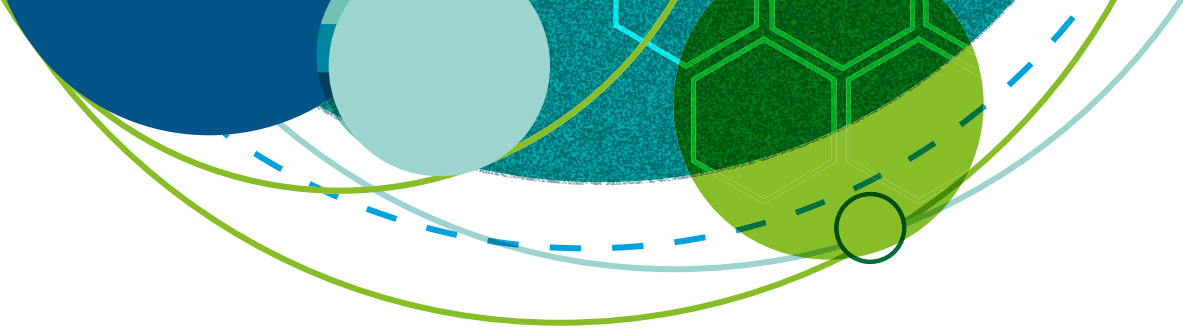
According to a recent Total Economic Impact™ report by Forrester, organizations that adopted Connected Planning's best practice principles and processes yielded a **303% return on investment (ROI)** over a three-year period.¹

Conversely, when Connected Planning is not implemented correctly, organizations may experience:

-  Poor license utilization
-  Stagnating platform performance and adoption
-  Shrinking return on investment/value realization
-  Static business plans that can't respond to dynamic market conditions

In many instances, sub-optimal deployment occurs when organizations have multiple use cases but fail to easily share insights and data, can't optimize for coverage, or simply lack the skill sets needed in their internal CoE(s) to operate effectively. Considering nearly half of companies who invest in supporting their Anaplan capabilities with CoE(s) have multiple Anaplan use cases deployed,² the opportunity to improve ROI is immense.





Recognizing the most effective CoEs





The most effective CoE's are those that start small, act fast, and scale over time. They're comprised of individuals from across the organization that excel in their area of expertise, and bring their talents to the larger table. They hold each other accountable, make time to measure progress, and commit to changing what doesn't work while maximizing what does.

Likewise, effective CoEs must be devised with intent, handled with care, and consistently evaluated to ensure a lasting impact. A CoE that operates without oversight can hinder the organization's goals and mission, defeating its purpose before real work even begins.

The value of prescribing a CoE Health Check

Deloitte's Center of Excellence Health Check helps teams develop an optimized, end-to-end roadmap for their CoE systems and strategy. It also allows for an open and honest assessment of an organization's current CoE process and operating model, while also considering the organization's unique Anaplan architecture, governance, and engagement.

Because a CoE Health Check is tailored to identify and diagnose lingering issues, it's also able to help teams build a customized treatment plan for the future. As a result, organizations that have embraced Anaplan's Connected Planning and undergo a CoE Health Check can achieve value by:

-  Improving time to deliver business requirements
-  Understanding technical data gaps and performance issues
-  Increasing overall Anaplan platform value
-  Proactively discovering new value for an existing platform

Deloitte's expansive industry knowledge, deep experience with enterprise clients, and proprietary Anaplan CoE structure market data, means that a CoE Health Check can also help organizations establish a results-oriented baseline to benchmark performance against best-in-class competitors. This helps the organization gauge relative performance and identify functional and technical opportunities to improve connectivity and eliminate silos.

The Health Check allows an organization to envision the future of its CoE, relative to its ability to adopt existing licenses and scale effectively. Is the organization truly ready to scale? Is it capable in its current state? In these scenarios, the hardest questions can reveal the most useful feedback and answers.

By deeply evaluating how a CoE is governed, its vision and strategy, the policies in place to execute its mission, model building and design, and integrations and architecture—the Health Check can help generate a comprehensive scorecard of findings and recommendations.



The phased approach to a CoE Health Check

It takes just a few weeks to tabulate this scorecard. Through a phased approach, the CoE Health Check can yield an actionable roadmap with short-, mid-, and long-term recommendations.

Phase 1 – Project Setup

Before the CoE Health Check begins, Deloitte works with the client to collect pre-requisite materials, develop and schedule assessment sessions with stakeholders, and enable system access and connections as needed.

Phases 2 and 3 – Project Kick-Off, Health Check Assessment, and Benchmark Analysis

Once the pre-work is complete, Deloitte works with the client to initiate Health Check assessment sessions via interviews, demos, prepare and schedule workshops if needed, analyze materials collected, assess current CoE components, and benchmark the CoE against competitors/best-in-class companies. The graphic below illustrates what the Health Check assesses in more detail.

CoE Health Check Framework

	1	2	3	4	5	6
	Vision & Strategy	Organization & Governance	Processes	Implementations & Enablement	Model Building & Design	Integrations & Architecture
KEY QUESTIONS	How well is the enterprise using the full capabilities of Anaplan connected planning? What areas can be developed to better service stakeholders?	How is your team constructed, organized and governed?	What policies, procedures, and tools are in place?	How well is the enterprise implementing templates for standardizing to improve efficiencies? How well are they delivering the “right” experience to stakeholders?	What capabilities and performance is the Anaplan solution providing the enterprise? How well are models designed for scale and flexibility? (e.g., future proofed)?	How is the ecosystem enabling Anaplan solutions to run effectively, securely, and efficiently?
DIMENSIONS	Vision 1A: CoE Charter Strategy Strategy 1B: Connected Planning Strategy 1C: Insource v. Outsource Structure 1F: Connected Planning Roadmap 1G: Governing Body 1H: Training and Development of staff	Operating Model 2A: Operating Model 2B: CoE Charter 2C: CoE Structure 2D: Process Documentations 2E: Internal Communications Stakeholders 2E: CoE Roles 2F: Business Unit Members	Processes 3A: Evaluation of Use Cases 3B: Criteria of Prioritization 3C: Use Case Onboarding	4A: User Persona Definition 4B: User Story Creation Sprint Cycle 4C: Sprint Planning 4D: Build 4E: Definition of Done 4F: Sprint Review 4E: End of Sprint Testing Deployment 4F: User Acceptance and Training 4G: Deployment 4H: Hypercare	Model and Module Design 5A: Technical Model Design Standards 5B: UX Design Standards 5C: PLANS Standards 5D: Disco Standards 5E: Model Optimization Report User Enablement 5F: Use Case Specific Enablement Plan for Model Builders 5G: Use Case Specific Documents for non Model Builders 5H: User Access and License Review	6A: Data Hub and Spoke Integration 6B: Single Data Integration into Hub 6C: Integration Methods 6D: Integration Security 6E: Model Rollover Documentation 6F: Key BAU Documentation
	7 Data Security (can span across all pillars)	How is data being managed for quality, accuracy and global compliance?		6A: Quality and maintenance 6B: Data mode and warehousing	6C: Archival 6E: Privacy and security	

Phase 4 – Recommendation Finalization and Roadmap

After intaking data and feedback, Deloitte’s team works to identify functional and technical opportunities to improve connectivity within existing Anaplan models, draft initial recommendations, and conduct a mid-point review.

Following initial recommendations, Deloitte works with clients to finalize benchmarking, optimization points, and recommendations, categorize and prioritize initiatives and develop a high-level roadmap, then review that roadmap with stakeholders.

Phase 5 – Roadmap Socialization and Activation

With alignment secured, the Health Check concludes as Deloitte works with the client to incorporate roadmap feedback, conduct program final readout, and lastly socialize and activate the roadmap.

A complete CoE Health Check provides all the necessary findings and discovery, plus practical plans to address uncovered or expected challenges, so that the organization can optimize its CoE and its overall model for Connected Planning.

A case study

A global consumer goods company using Anaplan models was under immense pressure to balance its incident management while working on enhancements. They turned to Deloitte to help them evaluate and build an expanded Center of Excellence to tackle the issues.

The company determined that a CoE would achieve better governance and measurable results, build trust among its business users by providing consistent service, and ensure timely, monthly submission for markets while deadlines overlapped.

The company then underwent Deloitte's CoE Health Check. It helped the company define a clear governance around incident management and enhancement process, and eliminate business-as-usual (BAU) risk by replacing the project's dependencies with stable, shared ownership by its CoE team.

The CoE Health Check also helped uncover ways to better manage monthly scheduled activities for planning cycles, model administration, and BAU support involving queries, issues, and training. As a result, the company was able to enhance its CoE to deliver an 80% increase in support requests due to a more people-centric CoE model, and zero escalations due to pre-defined processes and clarifying requirements and expectations with business users.

What will you achieve?

The diversity of organizations using Anaplan's Connected Planning ensures that there is no one-size-fits-all approach to a CoE Health Check. With so many variables, organizations need an experienced team assessing and prescribing the actions that will align planning and maximize the Connected Planning platform's benefits.

For organizations ready to assess with what's working, what needs work, and what real work looks like to achieve their goals, the CoE Health Check is just what the doctor ordered.

Reach out to learn more:

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1. The Total Economic Impact™ of Anaplan. Cost Savings and Business Benefits Enabled By Anaplan. April 2022. Forrester.
 2. Deloitte's Anaplan Center of Excellence Benchmarking Study. December, 2023.

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