



CONNECTED PLANNING WITH ANAPLAN FOR INSURANCE ORGANIZATIONS

TOP SIGNATURE ISSUES ANAPLAN ADDRESSES FOR INSURANCE



Connected Planning

It is critical for FSI organizations to connect planning functions across the “value chain” from originating products based on observed demand and changing customer preferences, to pricing, underwriting, and distributing those products via in-house and / or third-party channels, to servicing loans and managing claims. All throughout, integrated treasury and asset / liability management capabilities must be connected to optimize capital and manage risk.



Advanced Scenario Modeling

In addition to connecting operational and financial results, organizations are looking to better understand impacts of external drivers on performance in a time of rising inflation, economic uncertainty, and changing consumer behavior. AI / ML capability can help identify and quantify the most meaningful driver relationships to enable predictive forecasting, help define scenarios, and potential strategies to respond.



Capital Management

Leading FSI organizations are using changing regulatory requirements (e.g., LDTI / IFRS 17 for insurers) as an opportunity to more closely connect disparate arms of finance and risk management to establish integrated financial, economic, and regulatory capital frameworks so that proactive decisions can be made to drive the business forward rather than reacting to requirements of regulators and industry overseers.



Better Business Partnering

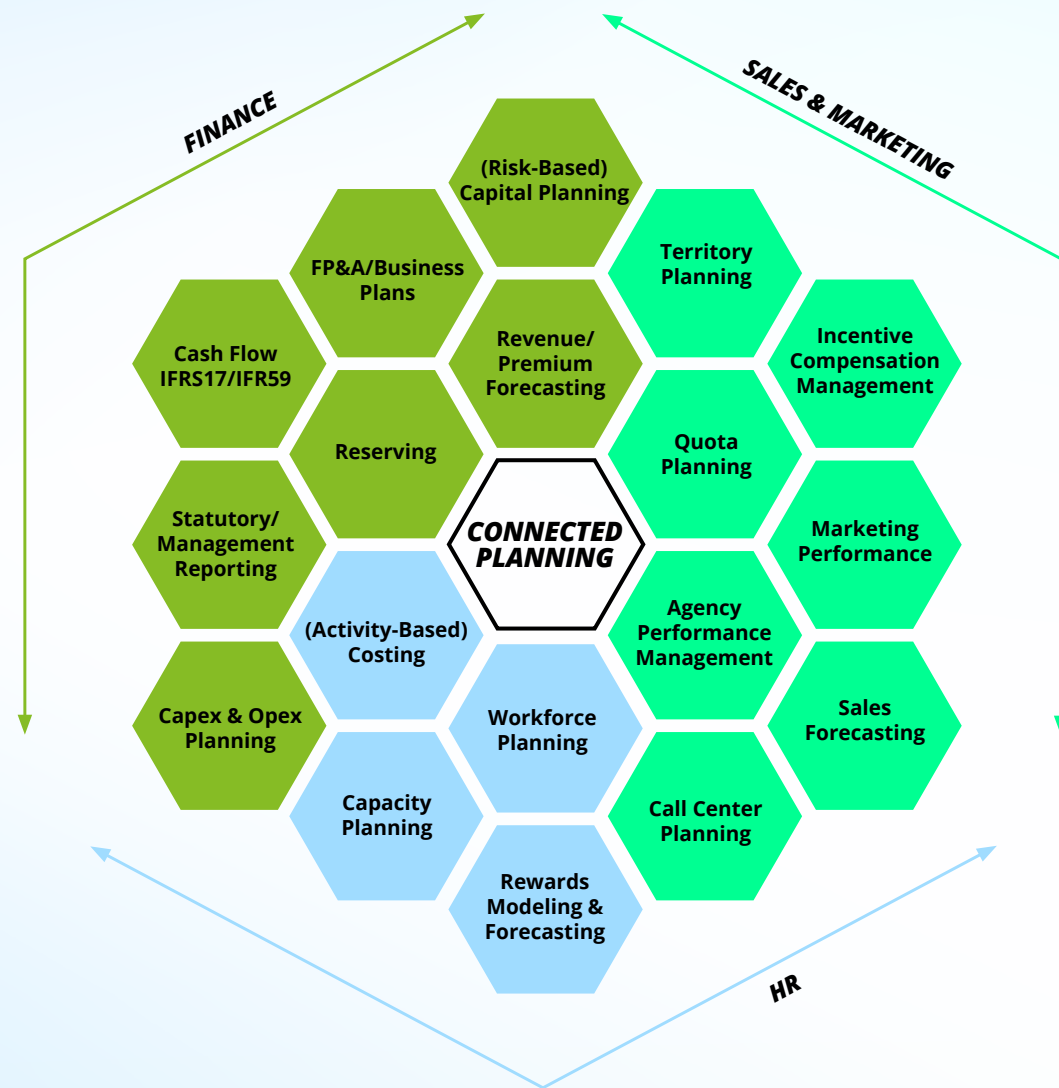
FSI organizations are continually looking to build and cultivate Business Finance talent with the ability to not only manage technical tasks and produce analysis, but also to translate the impact of that analysis to key business objectives, understand chains of cause and effect as they cascade across functions, and engage with stakeholders and customers in a way that informs and steers decision making.

Deloitte’s mission is to Deliver connected planning solutions to address our client’s most **complex business challenges**.

We’re here to **successfully implement** our **industry-leading solutions that leverage Anaplan**, enabling our clients to **drive revenue, accelerate profitability, and make informed decisions**.

With the power of **connected planning** combined with cognitive capabilities and predictive analytics, **increase visibility** across your organization, **connect siloed data**, and take your **real-time planning and forecasting** to an entirely new level.

Unlock the exponential value of connected planning with Deloitte and Anaplan.



DELOITTE'S INDUSTRY LEADING SOLUTIONS

PrecisionView™, Deloitte's proprietary advanced forecasting solution powered by Anaplan and Google Cloud, AWS or Azure, leverages data aggregation technologies with predictive analytics, cognitive, and machine learning capabilities to allow businesses to generate improved forecasting accuracy and predictive modeling. The solution also helps generate high-impact insights that relate to the total enterprise, business units, geographies, and products.

	Digital Cost Management	Integrated P&L Planning for Insurers	Closed Loop Marketing	iCost (Cost Allocations)
CAPABILITIES	Strategic tool that evaluates and analyzes costs to see where to invest to drive growth and performance.	The P&F model secures a single source of truth throughout the entire organization allowing greater collaboration, faster alignment and deeper insights for decision making.	Seamless integration of planning, budgeting, spending, campaign orchestration, and performance to achieve more cost-efficient marketing.	Solutions to drive business strategy through to execution enabled by statistical modeling, cross-functional collaboration scenario analysis, & performance mgmt.
VALUE AND BENEFITS	<p>Global workforce planning to address employee salary bands, employee costs and new roles.</p> <p>Bottom-up planning with capabilities for all expenses, forecasting, and plans by vendor.</p> <p>CAPEX planning for projects, with automatically-calculated depreciation.</p>	<p>Industry and maturity agnostic solution which enables strategy and/or execution by offering flexibility in model structure.</p> <p>Enables alignment of investment portfolio innovation with value creation across sectors.</p> <p>Promotes integration with upstream enterprise process (e.g., workforce planning, capacity management, external spend, portfolio management).</p>	<p>Leading practices around decision-making by connecting your planning, budgeting, and campaign strategy to performance and corporate objectives.</p> <p>Enhances decision making power through visibility into marketing data and results; enables real-time adjustments and reduces likelihood of missed opportunities.</p> <p>Rapid deployment and ready access Quick implementation breaks down operational silos with an integrated platform to increase agility and speed to market for campaign planning and execution.</p>	<p>Supports tactical and strategic decision making processes through insights.</p> <p>Enhances the level of transparency and cross-country collaboration through the use of unified models.</p> <p>Identifies potential risks and upsides to facilitate discussions around them.</p>

WHY DELOITTE?

Deloitte has been Anaplan's **global partner of the year for the last 10 years** and is their **only global partner of the year in 2024**.

Deloitte has **1000 + Anaplan trained resources globally**, and has completed **450+ successful implementations**, which is **~3x the size of our nearest competitors**.

OUR INDUSTRY LEADING SOLUTIONS WILL HELP YOU GET THERE FASTER

DELOITTE AND ANAPLAN ENABLE THE
CONNECTED ENTERPRISE

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Accelerated Time To Insight
Anaplan's integrated platform institutes a single source of truth for our data streaming critical analyses
- 

Reduced Risk
Process are assessed in real-time increasing visibility organization wide
- 

Faster ROI
Deloitte-built accelerators and solutions, powered by Anaplan, act as a launchpad to delivery
- 

Increased Productivity
Deloitte's functional expertise will enable the integration of strategy and technology to make processes more collaborative
- 

Expansion Into Multiple Use Cases
With Deloitte, gain a direct line to industry thought leaders across all of your company domains

CONNECTED PLANNING—RECENT SUCCESS
IN INSURANCE

- Allocations**

Allowed transparency into the cost allocation model and trace back from cost objects to the resources
- Workforce Planning**

Workload was reduced thanks to new functionalities (dynamic positioning, sourcing committee dashboard)
- Budgets & Forecasting**

Solution to increase consistency in data collection, drivers used, and assumptions
- Finance & Ops**

Highly efficient engine for master data management, transformation and validation

INSURANCE RECOGNIZES THE
IMPORTANCE OF PLANNING...
YET FACE MAJOR OBSTACLES

Deloitte's industry-leading solutions, powered by Anaplan, can help connect your people to your data, enabling you to navigate an ever-changing market so you can make more informed decisions, drive revenue, and accelerate profitability.

84%

of industry professionals say planning is critically important to enhancing revenues

82%

use spreadsheets for planning

95%

believe better technology would bring better business outcome for their company



FINANCIAL PLANNING
& ANALYSIS

- Target Setting
- IT Planning
- Strategic Project Tracking

STRATEGIC
VIEWS

- Marketing
- Actuarial
- Claims

OPERATIONAL
PLANNING

- Budgeting & Forecasting
- Decision Support
- Management Reporting

START THE CONVERSATION

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