Anaplan Models for Financial Planning - Stakeholder Presentation Deck Excerpt

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1. Introduction

As the Product Owner, I presented this 12-slide deck during the final stakeholder review (Jul 2025) for the Anaplan Models project (Jan 2025 - Jul 2025). This 2-3 page excerpt summarizes key slides, shared with the client's finance team, highlighting a 20% reduction in planning cycle time and 15% data accuracy improvement.

2. Slide Summaries

Slide 1: Project Overview

- Objective: Automate financial planning with 5 Anaplan models.

- Context: 7-month project, 10-person Agile team.

- Goals: Reduce cycle time by 20%, improve accuracy by 15%.

- Stakeholders: Finance team, Deloitte engineers, SAP admins.

Slide 2: Key Features

- Budgeting Model: Variance calculations, SAP integration.

- Forecasting Model: 12-month projections, <5% error.

- Revenue/Expense Models: Real-time tracking, anomaly alerts.

- Workforce Model: Headcount planning, HR sync.

- Integration: IICS for data sync, Control-M for scheduling.

- Dashboards: Power BI for KPIs, designed via Figma.

Slide 3: User Stories

- Analyst: "I want automated budgets to save time."

- Manager: "I want accurate forecasts for reporting."

- Admin: "I want reliable data syncs."

- Acceptance Criteria: Models functional, SOC 2 compliant.

Slide 4: Project Timeline

- Jan-Feb 2025: Requirements, Figma prototypes.

- Mar-Apr 2025: Model development, IICS integration.

- May-Jun 2025: Control-M setup, Power BI dashboards.

- Jul 2025: UAT, deployment.

Slide 5: Key Metrics

- Cycle Time: 20% reduction (500 hours saved/year).

- Data Accuracy: 15% improvement (verified via SQL).

- Adoption: 90% across 10 teams in first month.

- Sync Reliability: 100% uptime for IICS/Control-M.

Slide 6: Challenges and Solutions

- Challenge: IICS latency in sprint 4.

- Solution: Optimized mappings, resolved by sprint 5.

- Challenge: Forecast model errors.

- Solution: Validated with mock data in UAT.

Slide 7: Next Steps

- Q3 2025: Scale to 20 teams.

- Q4 2025: Add custom KPI filters.

- Q1 2026: Explore AI modeling.

3. Presentation Details

- Audience: Client finance leadership, IT team.

- Format: Microsoft Teams, PowerPoint slides.

- Feedback: Positive, requested advanced forecasting.

- Outcome: Client approved MVP, extended contract.