



## Case Study:

Online Retailer achieves  
Connected Planning across  
Finance & Supply Chain



## Achieving connected planning

The following case study shares the story of a British e-commerce company operating over 100 international websites and selling fast-moving consumer goods direct to consumer through its proprietary e-commerce platform.

The journey with Anaplan started within the heart of the Finance team. The online retailer's Finance Director saw an immediate need for a platform that was able to support the ongoing increase of data volume and its sparsity. They saw the need to move from time-consuming Access databases and Excel reporting, to be able to retrieve the information needed every month or every day without asking the team to run time consuming queries, perform calculations in Excel and expect the result they were looking for in a matter of days, even given the agility of the highly skilled team. The IT infrastructure within the Finance department was not evolved enough to support the nature of the business and stay competitive at the same time.

### Use Cases:

- ✓ FP&A: Actual Reporting and Consolidation, Management Accounting Reporting, BI reporting, Detailed Cost Calculation (cost per unit)
- ✓ S&OP: Demand Planning, Supply Chain Management, Production Management
- ✓ Planning, Budgeting and Forecasting

One of the starting points with Anaplan and where benefits were immediately seen, was analysing the transactional data, interrogating and validating this data and ensuring the business trusted Anaplan's repository of data from the Data Hub. This exercise was completed early in the project phase where the customer then had the benefit of central data repository in Anaplan. This early quick win was fundamental in getting product buy-in as the customer immediately saw the benefit of one true source, removal of data maintenance and collection overheads and utilising the Data Hub as the feed to the "spoke" models that would be built as part of the engagement. The Data Hub became the beginning of the data journey in Anaplan and allowed the customer to feed sanitised and trustworthy aggregated data by SKU, Website, Warehouses and any other dimensionalities needed to the receiving applications. From the first time the Leadership Team saw Anaplan, they were impressed with the ability to pivot and filter when working with thousands of SKU's. This was one of the determining factors when making the decision to embark into the journey of achieving a connected planning platform across the company's dispersed divisions.

The retailer had never seen such ease of use before in any other competing tool, the way Anaplan could adapt and support the multiple entities was an exciting concept. The finance team, who were used to working in a fast-paced environment, quickly adopted the tool and made a start with a few use cases at a time, covering Actual Reporting & Consolidation, Management Account Reporting, BI Insights and Data Load as well as a complex CPU calculation model. They all started without prior knowledge of Anaplan but with the help of Bedford's consulting team, they now own the entire Anaplan ecosystem.

The Supply Team are also seeing the benefits of Anaplan and the ease of accessing the transactional data needed for their processes. The team have started developing a Supply model containing the Demand Planning and Supply Chain management processes which will also connect back to the Finance Department for one version of the truth.

The project was implemented using the Anaplan Way methodology, gathering user stories and having daily stand-up meetings, as well as sprint review meetings every three weeks ensuring timely feedback and utilising the flexibility of the tool to its full potential. In a nutshell, the retailer has embarked on achieving the connected planning dream, working hand in hand from the early stages of development with the Bedford team. In the future the team will be looking at creating a new Data Hub for the seamless flow of data as well as utilising the UX for enhanced dashboards and the mobile app to make immediate changes on the move.

## Challenges

There were 4 divisions of the company with different stakeholders and different models for FP&A and S&OP processes.

Rapidly expanding global business and the need of a centralised reporting tool.

Access Databases and Excel were not able to support the millions of transactions and aggregate them in a timely manner.

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Implementing Anaplan across our business has saved us days in manipulating data and allowed us to make informed business decisions



## Solution

Anaplan helped by connecting different functions, people and business data ranging from financial consolidation and management reporting to detailed calculations of cost per unit. The implementation of a central repository of data for all use cases and the ability to access detailed transactional information, as well as real-time data feeds including adhoc reporting were all achieved during the implementation.

Expand the best practices and methods utilised by the central team in UK to the rest of the teams globally.

One single source of truth and standardised reports across all divisions and countries.

## Results at a glance

6 models deployed in less than 6 months (Data Hub, Finance, IFRS16, CPU, Supply, Inventory Model) and an ongoing process to improve developed models or create new ones

The time spent in preparing the monthly and weekly reports was used to analyse the data in more detail, find outliers and identify opportunities.

Data sources were challenged and organised in a better way to support the Anaplan platform and the rapidly increasing volume of data

Quicker reports, flexible and easy to use, in-house model builders

## Key Benefits

Access to the transactional data, analysis of more than one month of transactions at once, identifying data quality issues and correcting those directly in the source. Finding new ways of organising the current data warehouse

Connected Planning between models like FX calculation into the Finance model and distributed in time to all models in need

High involvement of SMEs, internal model builders and support of project sponsor from the beginning along with Bedford development team, a relationship which motivated them to train more end users and put a future Centre of Excellence in place

In-house development of true Connected Planning linking up databases and Data Hubs, less and less support needed from the consulting team but always in contact to review best practices

Implementation of The Anaplan Way during development allowed for early feedback, capturing new requirements as development was in progress and ongoing contact between the Project Team and the business

Collaboration between different parts of the business (divisions and departments)



## About Bedford Consulting

Bedford Consulting is an **Anaplan** reseller and **2020 Anaplan Partner of the year for EMEA**, specialising in project implementation, software sales and connected planning.

We believe passionately that the software we use should empower organisations to plan in a truly connected way, reducing time spent on data collation and preparation and enabling faster, connected decisions across the organisation.

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