



## CUSTOMER STORY

# Connected planning in pursuit of “best- in-class”

With a 300-year heritage, RSA Group is one of the world's leading insurance groups. The company, which has over 20,000 employees in its core markets of the U.K., Scandinavia, and Canada, focuses on general insurance and has the capability to write business across the globe.



## Use cases

- Planning and budgeting
- Workforce planning
- Zero-based budgeting
- Activity-based costing
- Tax modeling

## Challenges

- Tedious nine-month planning cycle with a spreadsheet-based process
- Siloed, functional fragmentation across the company
- Product proliferation at a high cost
- Issues with data quality; e.g., spending significantly more time cleaning data rather than providing insight to key stakeholders throughout the business

## Solution

- Implemented connected planning on the Anaplan platform in just five weeks
- Rapidly replaced onerous spreadsheet-based processes for financial planning, expense planning, and workforce planning in contact centers

## Results

- Reduced complex planning process from nine to five months, with planned reduction to three months
- Workforce planning team experienced a 50 percent improvement in productivity
- Provided improved decision support to business users
- Better planning that improves both customer service and financial results
- Business ownership of connected plans, instead of just finance ownership

## Why Anaplan

- Only short-listed solution that could be rapidly implemented
- Users can own and develop the system themselves without specialist support
- The finance team can now add value by providing answers to executives' "so what?" questions

Late one night, after the team had already been planning nonstop for weeks, one of Andrew Dinwiddie's colleagues slammed his fists down on his desk and said, "Surely, this can be easier; surely, we can find a solution to make this a less intense process." It was that outburst of frustration that triggered Andrew and his team to look for different solutions to their financial planning needs and ultimately led them to the Anaplan platform.

As a former consultant, Andrew Dinwiddie quickly recognized that RSA Group would struggle to achieve its objective of being the best general insurer in its target regions if he persisted with the onerous spreadsheet-based processes that precluded his team from adding value. For RSA, being the best means providing an exceptional customer experience and delivering superior financial results—and if the company were to consistently achieve these goals, the FP&A team needed rapid answers to what Andrew calls their "so what?" questions. But that was never going to happen while spreadsheets were the main tool used for planning. "We spent 95 percent of our time just getting the answer together in a spreadsheet, so we weren't able to analysis the results or add value to the business decisions being made," said Andrew. "That was a key facet we wanted to address in a new platform."

## Andrew's three key questions for software selection

Regional CFOs, key business partners, and the financial analysts who deal with planning models and data sources as part of their daily routine were all involved in the selection process. "We asked potential suppliers three questions," said Andrew. "One was ease of use, the second was time to implement, and the third was whether my team could own the system going forward."

"We were able to implement the Anaplan platform within five weeks, which, when we looked at other products, was night-and-day different."

Speed of implementation was perhaps the main selection criteria at the time as the new platform needed to be ready for the rapidly approaching planning and budgeting cycle. However, since then, Andrew and his team have discovered that being able to make changes themselves and own the on-going development of the Anaplan platform has become increasingly valuable. “We’re able to develop the system ourselves and grow it as we move forward,” he explained. “So we looked at what benefits the platform could bring to our processes and, ultimately, the number of people involved in the planning process.”

Initially, his team used the Anaplan platform only for P&L and expense planning, with little or no change being made to the processes themselves, and that resulted in RSA’s complex planning process being reduced from nine months to five months. But since then, RSA has re-engineered its planning processes to take full advantage of the flexibility of the Anaplan platform and is aiming to compress the cycle down to just three months.

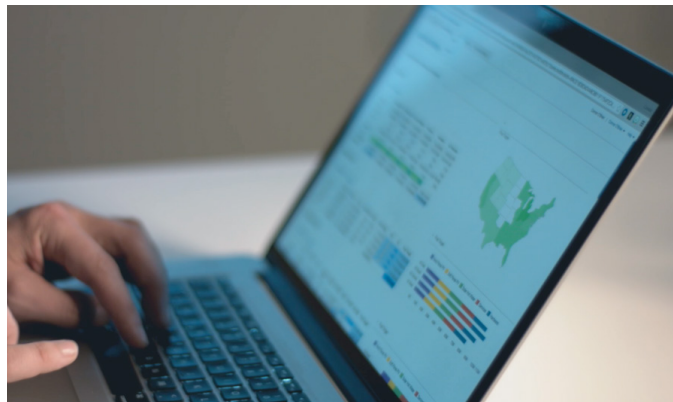
## Connected planning delivers value for RSA

Andrew estimates that half of those using the Anaplan platform today are traders, underwriters, and departmental managers who both contribute data and access their own self-service reports through the front-end portal. Familiarity with the Anaplan platform has led these non-finance users to appreciate how it can solve planning issues in their own areas and their enthusiasm has been well received by Andrew and his team.

“Previously, with my background in consulting, it was all about coming in and understanding the problems of your clients, but also looking for solutions and key levers for change. And that’s very much the approach we have taken with the Anaplan platform,” he explained.

A great example of how Anaplan has enabled connected planning in RSA is in workforce planning, where previously there was a team of 50 people doing mainly low value-add work. “They were spending far too much time in spreadsheets, and ultimately, when they went to the business with the answer, it was already out of date,” said Andrew.

Now with workforce planning modeled in the Anaplan platform, there are fewer people in the planning process and HR is able to spend more time working with the business to provide real time answers to their questions. For instance, if there is adverse weather and homes are damaged, managers need to know whether they have the right number of people to handle the anticipated increase in claims. Being able to respond to such situations faster helps RSA provide better service to their customers while improving their own operational efficiency.



“That’s the real value of the platform. We’re able to move people away from consolidating spreadsheets to being out delivering the best service for our customers.”

Delighting customers and driving efficiency are critical factors in being the best in the industry—and the Anaplan platform is helping RSA Group drive forward on both counts. But there are plenty of other benefits, too: The finance team is better equipped to provide decision support and enthuses about having business meetings where, thanks to the Anaplan data hub, everyone shares the same trustworthy data. Andrew also shared that there are plenty of other users and use cases to connect with Anaplan, and looks forward to the benefits that they will continue to see with this transformation.

“I think the possibilities are endless,” said Andrew. “Our next endeavors include implementing zero-based budgeting, activity-based costing, and tax modeling, which will provide the company with continuous year-on-year productivity improvements without big restructuring programs.”

# About Anaplan

Anaplan is driving a new age of connected planning. Large and fast-growing organizations use Anaplan's cloud platform in every business function to make better-informed plans and decisions to drive faster, more effective planning processes. Anaplan also provides support, training, and planning advisory services.

To learn more, visit [anaplan.com](https://anaplan.com)