Building Anaplan COE Readiness and Scaling FinOps for a **Global Alternative Asset Management GCC**

Data Operations · Team Performance · Health & Safety · Engineering Intelligence

2-3 Yrs	6	3
Our Relationship	Practice Areas Active	Anaplan Build-Out Underway

POLESTAR ANALYTICS

Client Overview

The client is a global alternative asset management company with US $1 trillion in AUM and ~250,000 employees globally, operating across real estate, infrastructure, renewable power, private equity, and credit.

Its GCC supports finance operations, IT, legal, and investor relations in a tightly governed environment where reporting accuracy, approval discipline, and data privacy are critical.

Polestar Analytics supports the GCC across FinOps and Anaplan model building, helping strengthen investor reporting, regulatory documentation, model optimisation, and the foundation for a future Anaplan Centre of Excellence.

Infrastructure Team

The client's Infrastructure division manages global assets in energy, transport & utilities. The Mumbai GCC runs Anaplan models and Finance Ops for this division.

Real Estate Team

Separate internal team within the firm. Polestar Analytics has been supporting their Anaplan needs for 2-3 years through a distinct engagement thread.

Polestar Analytics Team

Polestar Analytics FinOps Analyst + Anaplan Model Builder. The Anaplan Model Builder serves as the technical anchor for the Infrastructure team's COE ambitions.

Governance Context

High-regulation environment. All Anaplan model changes require rigorous testing and multi-level approval before deployment. Data privacy is non-negotiable.

CONTRIBUTION 01

Finance Operations: Specialist Capacity for a Global Asset Manager

Financial Statement Review

- Reviews financial statements prepared by the Toronto team.
- Ensures accuracy before submission to investors and regulators
- Applies US GAAP and UK GAAP standards consistently
- Reduces review cycle time by handling work offshore

Investor Reporting & Fees

- Prepares investor reporting confirmation documents
- Calculates management fees and carried interest
- Coordinates directly with the Toronto finance team on queries
- Supports capital call and distribution-related reporting

Regulatory Compliance

- Prepares regulatory requirement form sunder guidance from HQ
- Ensures documentation meets cross-border compliance standards
- Works as an integrated extension ofclient's India team
- Collaborates with offshore team members as needed

Why Polestar Analytics won over other competitors: Skill set match on continuous US GAAP experience with zero training lag. The client needed someone ready on Day 1.

POLESTAR ANALYTICS

CONTRIBUTION 02

Anaplan Centre of Excellence: Laying the Foundation

The client's Infrastructure team had one Anaplan resource globally — based in Canada — maintaining everything alone.

THE SITUATION

- Single Anaplan resource (Canada) = single point of failure
- Growing backlog of model change requests left unresolved
- Teams had stopped trying to use Anaplan because theycouldn't get support
- No India presence for Anaplan — no resilience, no scale
- High-regulation environment: every change needs approvalchains

POLESTARANALYTICS ROLE

- Polestar Analytics Team embedded as India's first Anaplanresource for Infrastructure
- Clearing long-standing model change backlog alongside theCanada resource
- Optimising existing models built without best practices
- Bridging knowledge gap: two-person team now maintains theentire system
- Positioned as the first hire in a planned multi-person AnaplanCOE in India

POLESTAR ANALYTICS

CONTRIBUTION 02

WHAT'S BEING BUILT IN ANAPLAN

Capital Call Automation

Automating notices for capital calls — replacing manual Excel-based processes for tracking cash receipts related to investor commitments.

Distribution Tracking

Automated distribution notices and cash tracking replacing Excel workbooks — giving the Finance team real-time visibility on investor distributions.

Model Optimisation

Clearing the backlog of model change requestsand applying Anaplan best practices —eliminating technical debt accumulated over years without a dedicated resource.

What Client Gets From This Partnership

Polestar Analytics is one of India's largest Anaplan practices

Deepest bench of certified Anaplan model builders in the country — givingclient a scalable partner as their COE ambitions grow.

Depth of Bench

When the client is ready to scale the COE, Polestar Analytics can supplysenior model builders, project managers, and COE leads — alreadytrained, already certified. No ramp-up lag.

Skill Set Match, First Time

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Finance-Grade Rigour

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Integrated, Not External

Polestar Analytics team attend clistandups, respond to ad hoc requests,and work as embedded members of the team — not vendor deliverablessitting outside the firewall.