

# Modernised a Legacy **Anaplan** Estate into a Strategic Planning Engine for a **Global IT Software GCC**



# The Business Pressure Behind This Engagement

## About Client

The client is a global IT observability and infrastructure management software company, serving 300,000+ customer sacross 190+ countries.

Following its 2024 private equity acquisition, the mandate was to maximise ROI from technology investments, reduce manual overhead, move contracts to multi-year terms, and enable leadership to focus more on acquiring new customers instead of managing renewal-heavy operations.

To support this shift, the GCC uses Anaplan as the core FP&A and planning platform.



### Anaplan - 10+ Years

The client is one of Anaplan's oldest customers. The model had barely changed in 6-7 years. A PE-driven push for efficiency finally created the mandate to modernise.



### Primary Users - FP&A

Finance Planning & Analysis team uses Anaplan as their core platform. Sales Ops team identified as the next expansion target — currently running on Excel + Tableau.



### Tech Stack

NetSuite (data hub) • **SAP Success Factors (HRIS)** • **Greenhouse** • **Coupa** • **Anaplan** • **Power BI**. Data currently uploaded manually — integration is Phase 2.



### Polestar Analytics Team

A 3-person pod - 1 Engagement Lead, 2 Model Builders - since August 2024.

Contribution #1

# Anaplan Model Optimisation: Unlocking 35+ GB in Record Time

## The Problem:

The client had hit their Anaplan workspace size limit. The model was slow, new implementations were blocked, and the 10-year-old architecture was riddled with inefficient builds and missing best practices.

### PHASE 1

#### Emergency Relief

When a new requirement hit with only 1-2 days to act, Polestar Analytics Team identified a temporary optimisation approach that freed 15 GB instantly — more than enough to unblock the urgent implementation.

**15 GB**

freed in 1-2 days  
Unblocked urgent  
implementation

### PHASE 2

#### Full Optimisation

Over 1-2 months, Polestar Analytics Team rebuilt the model architecture following Anaplan best practices — eliminating inefficiencies and creating headroom for years of new development.

**35-37 GB**

Storage freed

**3 Weeks**

Ahead of deadline

Client reaction: They sent a formal praise emails and cited this delivery in leadership meetings. The team was recognised for both speed and the quality of the long-term solution delivered.

## Contribution #2

# UX Modernisation: Moving to the New Anaplan Experience

10 years of legacy dashboards. One recommendation. A 3-month migration programme now underway.

### Old UX -

#### Status Quo

- Legacy dashboard framework — unchanged since implementation
- Limited interactivity; users cannot self-serve insights
- Inflexible layouts forcing workarounds in Excel and Python
- Cannot accommodate new data sources or expanded user groups
- Not aligned with what Anaplan can do today

### New UX -

#### Polestar analytics delivering

- Intuitive, modern interface that FP&A users want to use
- Replaces Python and Excel workarounds with native Anaplan capability
- 3-month phased delivery currently in progress



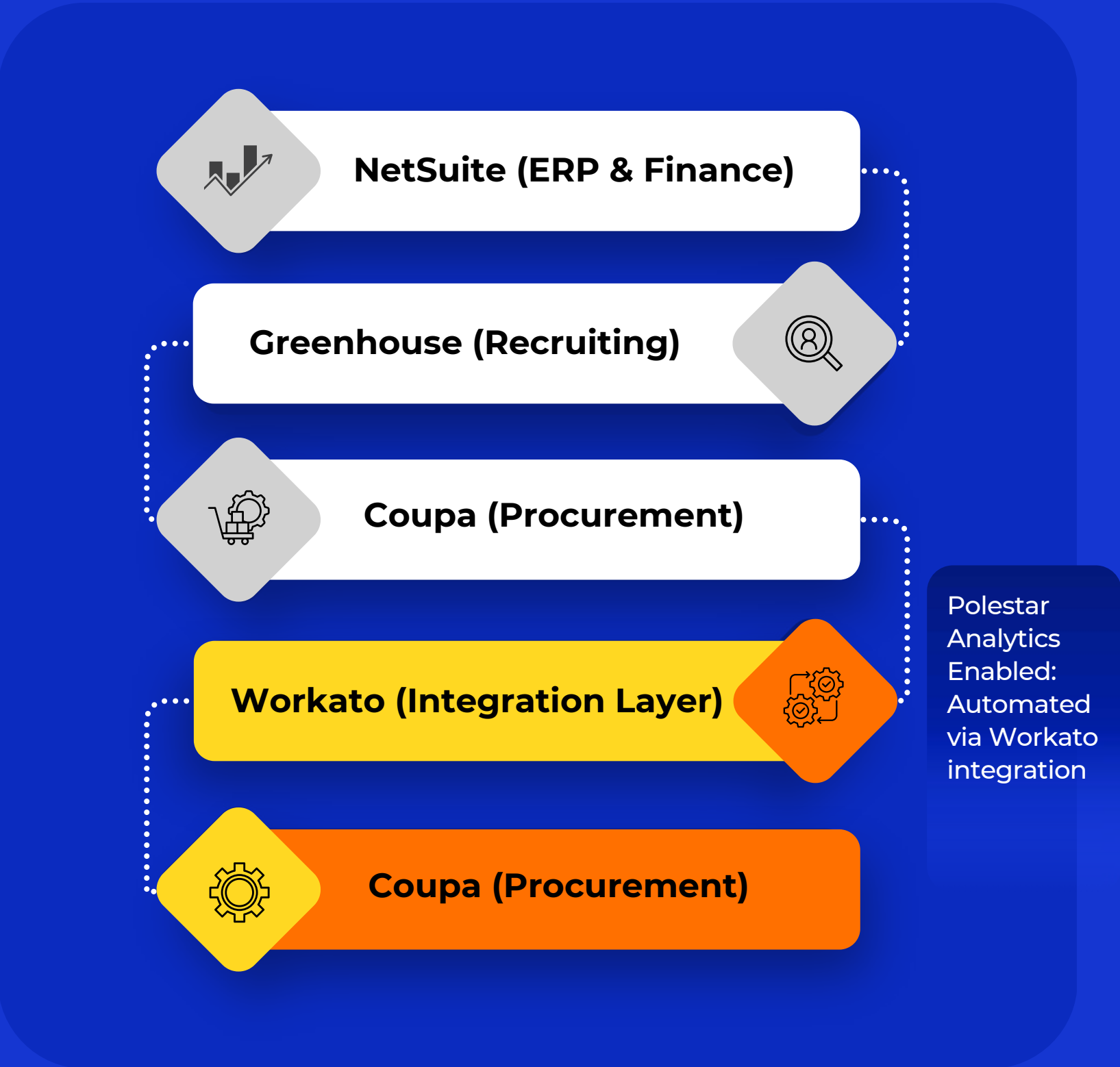
Business outcome: A single, intuitive Anaplan interface replacing fragmented tools — positioning FP&A to become client's single source of truth for financial planning and reporting.

Contribution #3

# Data Integration: From Manual Uploads to Real-Time Intelligence

## Today - Manual Data Chain

Data from NetSuite, Greenhouse, Coupa is downloaded manually, then manually uploaded into Anaplan — weekly or monthly. Error-prone, time-consuming, and stale by the time it arrives.



# Current: Manual download & upload

## ✔ Near Real-Time Data

Data updates move from weekly/monthly manual cycles to automated, near real-time feeds. FP&A acts on current data, not week-old snapshots.

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## 🗂️ Zero Manual Errors

Human error from manual uploads — wrong files, wrong periods, missed reconciliations— eliminated entirely through automated pipelines.

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## 🕒 Man-Hours Reclaimed

Hours spent downloading, reconciling, and uploading data each week are returned to the FP&A team for actual analysis and decision support.



What's Next

Expanding the Anaplan Ecosystem  
Across Organization

ACTIVE CONVERSATION

Financial Sales Operations Team

Currently running entirely on Excel and Tableau. Polestar Analytics team has initiated conversations to bring this team onto Anaplan. Leadership availability has been the primary blocker — now being resolved. This team has expressed strong interest after seeing Anaplan demos.

**Excel → Anaplan**  
Target migration

IN PLANNING

Full Data Integration

Connecting NetSuite, Coupa, and Greenhouse directly into Anaplan removes the weekly manual upload cycle. Conversations with Workato (the irNetSuite/Salesforce partner) have begun. This is Phase 2 of the technical roadmap.

**Real-time**  
Data availability

What's Next

## Expanding the Anaplan Ecosystem Across Organization

BACKLOG READY

### 6-7 Item Project Pipeline

Polestar Analytics and the client have jointly scoped 6-7 additional Anaplan projects beyond model optimisation and UX migration. The client is actively pushing for faster delivery — creating the case for expanding Polestar Analytics team capacity.

**6-7**

Projects scoped & ready

Anaplan



# What Client Gets From This Partnership



## Anaplan Depth, Not Generalism

Polestar Analytics brought genuine Anaplan SME capability — the exact thing client lacked for 6-7 years despite being a 10+ year Anaplan customer. Best practices applied from day one.



## Speed of Delivery

35-37 GB model optimisation delivered 3 weeks ahead of schedule. Emergency 15 GB relief done in 1-2 days.



## HQ Mandate Alignment

Polestar Analytics work helped the client align with its HQ mandate: maximise ROI from tech platforms, reduce manual overhead, and give leadership the data they need to run a leaner business.



## Partner, Not Just Resource

Polestar Analytics team proactively mapped expansion opportunities (Sales Ops), identified integration needs, and scoped a 6-7 project pipeline – showcasing strong strategic foresight aligned with the mission of the GCC.

# About Polestar Analytics

Polestar Analytics is a leader in Data, Analytics, AI, and Enterprise Planning helping organizations to unlock intelligent outcomes through our proprietary products like 1Platform, accelerators, and services. Our expertise spans data engineering, data science, agentic and generative AI, and advanced planning for CPG/Retail, Pharmaceuticals, Manufacturing, IT/ITeS, and Financial Services.

**Reach out to us today!**