

Client: Emerging Services Conglomerate

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# Workforce Planning redesigned with Anaplan



# Client Overview

Our client is a leading service conglomerate with a strong presence in both the United States and India. They specialize in delivering high-quality technological solutions across various industries in 14 countries, focusing on enhancing operational efficiency and driving innovation.

The client serves diverse sectors, including retail, consumer packaged goods (CPG), pharma, senior housing, and BFSI, demonstrating their versatility and commitment to meeting the unique needs of each industry.

# Problem Statement

They faced significant challenges in people management due to manual and decentralized practices that relied heavily on individual knowledge. Employee information was fragmented across emails and spreadsheets, leading to inefficiencies, increased errors, and difficulties in timely decision-making. As the company expanded, these cumbersome processes hindered effective resource allocation and limited visibility into critical workforce metrics such as performance and skill gaps.

# Key Challenges

## Fragmented Demand Management Data

The information was collected through various sources (CRM, HRMS, Finance, Accounting, Excel) made it difficult to maintain accurate and up-to-date records.

## Spreadsheet based requirement planning

Heavy dependence on spreadsheets for resource planning introduced the risk of errors, duplication, and inefficient processes.

## Lack of recruitment and skill gap guidance

Without a comprehensive system, the company struggled to identify and address skill gaps, hindering effective recruitment and talent management.

## Absence of reporting

Without a comprehensive system, the company struggled to identify and address skill gaps, hindering effective recruitment and talent management.

# Solution overview

We first gathered insights through multiple discovery workshops and architectural envisioning. After assessing the various databases involved - including HRMS, CRM, spreadsheets, timesheet data, and purchase order/invoice information (please refer to the diagram below) we identified specific areas where we can assist our client. Following a series of discovery workshops, we evaluated the company's current processes and determined that Anaplan is the most suitable solution for their needs.



Pre Anaplan Implementation Process

# Solution Details

The solution addresses the identified challenges with the following key components:

## ● **Resource Utilization Visibility**

Providing clear visibility into resource utilization for the current fortnight (CN), next fortnight (NF), and the following fortnight (NNF), essentially covering a 42-day outlook.

## ● **Unified Environments**

Creating separate yet integrated environments for Demand Management and Resource Management to streamline processes.

## ● **Integration of sales pipeline and demand tracker**

Connecting the sales pipeline to the demand tracker to provide real-time insights for the delivery and resource management teams.

## ● **Data Automation**

Automating the flow of data from multiple sources like CRM, HRMS, Accounting, and financing systems into a centralized location to enhance efficiency and reduce manual errors.

### Role-Based Access Control

Implementing restricted role-based access for resource planning, demand generation, and employee management to ensure data security and integrity.

### Project Creation in ERP

Initiating new projects in the ERP system automatically upon reaching the 'Win' stage in the CRM.

### Financial Tracking

Calculating booked and invoiced amounts based on employee-level timesheets and comparing them against purchase order values to give project managers and team leads visibility into remaining budgets.

Create Demand

Delete Demand

Move to Pipeline

Move to Pre Sales

Demand Management							
Project Name	Industry	Requestor	Project Status	Type of project	Start Week	End Week	Demand Status
Insurane_Project A	Insurance	Harry	Sold	Staff	12-Nov	26-Jan	Closed
Insurane_Project B	Insurance	Harry	Final Stage	Resource	14-Feb	30-Apr	Closed
Insurane_Project C	Insurance	Harry	Sold	Fixed Fee	12-Jan	28-Mar	Closed
Power BI_Project A	Retail	Harry	Sold	Staff	28-Mar	11-Jun	Closed
Power BI_Project B	Retail	Hermoine	Sold	Staff	16-Jul	29-Sep	Open
Power BI_Project C	Retail	Hermoine	Final Stage	Staff	01-Jan	17-Mar	Closed
Power BI_Project D	Retail	Hermoine	Sold	Staff	02-Feb	18-Apr	Closed
ClientA_Australia	Retail	Hermoine	Sold	Staff	15-Mar	29-May	Closed
ClientB_Australia	FMCG	Hagrid	Pipeline	Staff	05-Jun	19-Aug	Closed
ClientC_Australia	FMCG	Hagrid	Sold	Resource	04-Apr	18-Jun	Closed
ClientA_Canada	FMCG	Hagrid	Sold	Resource	02-Jun	16-Aug	Closed

*Sample dashboard: Showcasing the ability to create and edit demands, move pipelines, pre-sales, etc., making the system seamless*

# Business Impact

## 100%

### Visibility

Through consolidated workforce dashboards to allot requirements & map employees

## 20+

### Excel reports automated

20+ Excel reports automated within anaplan which resulted in streamlining reporting processes

## 80%

### Reduction in lost opportunities

Through better demand forecasting and resource allocation like( Delivery Dashboards to allot requirements & map employees and HR Dashboards for employee status & data management)HR Dashboards for employee status & data management

# Client Feedback

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“We have seen a tremendous improvement in resource utilization, and we can minimize bench periods for resources. More importantly, due to timely fulfillment of demands, the lost opportunities have been reduced significantly”

**Sales Head**

**AMER & EMEA, IT Services Company**

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