Implementing **Anaplan Data Orchestrator** to **Eliminate Data Integration Bottlenecks** for a Leading Private Equity Firm

Client Success Story

Client Overview

The client is a well-known Private Equity firm that specializes in managing a diversified portfolio in various industrysegments. To expand its business, consolidating financial data from Snowflake into Anaplan, in a bid to streamline itsoperations, is proving to be a complicated task.

To facilitate rapid decision-making processes and operational efficiencies, the organization collaborated with PolestarAnalytics to deploy **Anaplan Data Orchestrator** to create a governed and automated data movement solution for real-time portfolio insights with minimal reliance on IT support.

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Key Bottlenecks

The infrastructure was strong, but there were data integration gaps that caused significant challenges.

Data Structure Gaps Creating Integration Complexity

1. Missing unique keys across portfolio company datasets made cross-source mapping extremely difficult
2. Structural inconsistencies resulted in frequent mismatches and duplicate records during consolidation
3. Extensive manual cleanup efforts delayed reporting cycles and reduced data reliability

Heavy IT Dependence Slowing Business Agilit

1. API-based integrations required dedicated engineering resources for schema changes or process modifications
2. Extended lead times for even minor adjustments prevented quick responses to evolving business requirements
3. Technical dependency created bottlenecks in planning cycles

Low Transparency in Data Transformations

1. Critical transformation logic-mapping, reconciliation, and version control happened outside Anaplan with limited visibility
2. The finance team couldn't validate data processing steps, slowing validation and reducing trust in consolidated metrics
3. Lack of audit trails raised concerns during compliance reviews

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Solutions Implemented

Polestar Analytics designed an all-encompassing data orchestration system, which implements an entire, end-to-end automatic network through their Anaplan Data Orchestrator (ADO).

Automated End-to-End Data Pipelines from Snowflake
- Implemented ADO to establish fully automated data pipelines.
- Configured scheduled flows that run autonomously, ensuring consistent and timely data availability for planning and reporting.

Deterministic Key Generation & Advanced Mapping Logic
- Designed intelligent key-generation algorithms within ADO to create consistent, unique identifiers across disparate datasets.
- Built flexible transformation logic to reconcile entities even when source systems lack natural keys, eliminating data mismatches.

ransparent Data Transformations within Anaplan
- Shifted all critical data transformations into dedicated Anaplan modules governed by ADO workflows.
- Provided the finance team full visibility into transformation logic, accelerating validation and establishing clear audit trails.

Consolidated Data Preparation under a Governable Framework
- Established a unified data preparation layer within ADO+ Anaplan to include cleansing, standardization, and enrichment.
- Ensure that the logic used in the centralized preparation is consistent across all portfolio companies with the use of reusable modules.

Structured Approval & Validation Workflows
- Implemented Anaplan workflow mechanisms in conjunction with ADO for controlling data movement approvals.
- Implemented validation checks to monitor inconsistencies before the information reaches the planning models.

Reusable Templates & Modular Architecture
- Created a library of usable templates for both an ADO connection and scheduling configurations that may be adapted for new data sources.
- Reduced setup times for new integrations, making it easier to onboard companies within its portfolio quickly.

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The Overall Business Impact

1

97% reduction in manual integration efforts,

allowing financial teams to focus on analysis rather than data manipulation.

2

Enhanced level of transparency

with relation to increased openness of changes in their transformation logic contained in Anaplan.

3

85% reduction in the dependency on the use of IT,

enabling the business users to run the schedules and transformation rules on their own.

4

Increased availability of data

through automation of the scheduling process to improve the timely generation of reports critical for making timely investment decisions.

5

Seamless automation of 10+ data integrations without unique IDs,

saving weeks of manual data mapping. Rapid onboarding of new portfolio companies via reusable ADO templates.

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