

Driving Financial Agility



Automating the Annual
Operating Plan (AOP)
through Anaplan for a Global
Tech Leader



Client Overview

The client is a Fortune 500 technology enterprise with billions in annual revenue, operating across multiple geographies with a complex organizational structure spanning multiple business units and product lines.

Despite their market leadership, the finance organization struggled with a highly manual, fragmented Annual Operating Plan (AOP) process that relied on disconnected templates across geographies and business functions. This created significant challenges in consolidation, accuracy, and decision velocity. It directly impacted their ability to respond to market dynamics and allocate capital efficiently.

To address these challenges they engaged with **Polestar Analytics** as their transformation partner to design and implement an **Anaplan-based AOP solution aligned to leading FP&A.**



Key Bottlenecks

The diagnostic phase identified several structural and operational bottlenecks commonly observed in large-scale technology organizations:

Decentralized and manual AOP processes

The AOP was managed across 24 disparate financial templates, resulting in inconsistent assumptions, limited auditability, and significant effort during aggregation and review cycles.

Complex multi-entity P&L consolidation

Consolidation of revenue, delivery costs, and OPEX across business units required extensive manual intervention, increasing cycle times and elevating operational risk.

Extended planning timelines due to manual validation:

Finance teams spent significant effort on data validation, issue resolution, and version reconciliation, delaying executive reviews and limiting time available for value-added analysis.

Absence of standardized inter-entity cost allocation mechanisms

Shared service and cross-entity costs lacked consistent allocation logic, impacting margin transparency and comparability across business units.

Limited cost-centre level visibility

The existing process did not show granular cost planning or driver-based analysis, constraining leadership's ability to identify efficiency opportunities or model downside scenarios.

Solutions Implemented



To resolve these challenges, Polestar Analytics designed and implemented a controlled, scalable **AOP planning framework on Anaplan**, leveraging industry-standard FP&A design principles and governance models.

1

Standardized Financial Input Architecture

Implemented 24 harmonized Anaplan input templates for revenue and cost planning, ensuring consistent dimensionality, standardized assumptions, and improved governance across the enterprise.

2

Automated P&L Consolidation Engine

Developed automated consolidation logic for P&L line items with real-time roll-ups, significantly reducing manual reconciliation effort and enabling faster iteration during planning cycles.

3

Embedded Data Validation and Workflow Controls

Configured cell-level validations, approval workflows, and stakeholder tagging to strengthen data quality, accountability, and audit readiness.

4

Reusable Planning Frameworks

Enabled template cloning and version management to support efficient reuse across business units while maintaining central control—balancing standardization with operational flexibility.

Solutions Implemented



To resolve these challenges, Polestar Analytics designed and implemented a controlled, scalable **AOP planning framework on Anaplan**, leveraging industry-standard FP&A design principles and governance models.

5

Inter-Entity Cost Allocation Capability

Designed and implemented standardized allocation models to distribute shared and cross-entity costs using defined business drivers, aligned with leading EPM practices.

6

Time-Phased Planning and Apportionment

Enabled flexible annual, quarterly, and monthly phasing of financial plans to support downstream forecasting, performance tracking, and variance analysis.

7

Executive AOP Governance Dashboard

Curated real-time dashboards to track submission status, consolidation progress, and exception management, improving transparency and enabling proactive issue resolution.

The Overall Business Impact



Accelerated AOP cycles
through automation,
reducing manual effort

Eliminated reporting
margins by standardizing
inputs and automating
validations

Improved **cost
transparency and
governance** across
entities and cost centers

Higher **stakeholder
productivity**, shifting
focus to analysis and
decision support

**Stronger controls and
audit readiness**
supporting internal and
external reporting

Rapid adoption, **with
HyperCare** transition
completed within
4 weeks