AUTODESK

Autodesk designs and makes a visionary Connected Planning and forecasting environment

With a mantra to connect, optimize, and automate, leading software company leverages agile, powerful finance and sales planning on the Anaplan platform

Watch video: **Autodesk plans with Anaplan**

SOLUTIONS: Finance, Sales, Workforce

INDUSTRY: Technology

With the vision to become the most insightful, digital, and admired finance team in the technology industry, Autodesk built an Anaplan environment that powers go-to-market finance planning, financial and sales forecasting, sales compensation, portfolio optimization, workforce and spend forecasting, license compliance, and many other complex processes. Anaplan's cloud-based platform addresses the limitations of traditional planning techniques and supports Autodesk's "Future of Finance" initiatives that establish engaging new finance career paths and build a finance team that is the best in the industry.

80%	**RAPID**	**30**
faster revenue forecast roll-up, even with change from perpetual to subscription pricing	recalibration of plans and forecasts, with models that are well-organized and intelligently architected	Anaplan models supporting various business functions on one cloud platform

Anaplan

Use cases

Thirty Anaplan models in go-to-market finance, financial planning and analysis (FP&A), treasury, and global revenue operations, including sales and financial forecasting, planning, spending, compensation, deal desk, workforce planning, license compliance and portfolio optimization models. Shared models include Data Hubs, allocations, and pricing.

Challenges

- Continuous change, and the need for agile, intelligent decision-making, require frequent adaptation and maintenance of the financial processes.
- Corporate "Future of Finance" initiative challenges finance to adopt Connected Planning and forecasting
- Attracting and retaining Anaplan talent as the company grows

Solutions

- Finance
- Sales
- Marketing
- Workforce

Results at a glance

- Changing revenue forecast from perpetual to subscription pricing resulted in 80% faster forecast roll-up, even with greater complexity
- Compensation strategy change enacted quickly using workforce planning model
- Rapid, streamlined response to changing COVID-19 conditions accomplished by changing assumptions to existing plans

Why Anaplan

- Single platform supports diverse planning and forecasting uses
- Cloud-native software supports flexible workplace including in-office, hybrid, and remote employees
- Improved modeling experience is fast, flexible, and organized

Company

Autodesk's mission is to empower innovators with design and make technology so they can achieve the new possible. Autodesk technology spans architecture, engineering and construction, product design and manufacturing, and media and entertainment, empowering innovators everywhere to solve challenges big and small.

"We don't believe in waiting for progress, we believe in making it." That bold proclamation from Autodesk is reflected in its design and make software applications that are used to transform how things are made in countless industries, empowering innovators everywhere. That same pioneering philosophy extends to Autodesk's internal finance functions. "Our vision is to be the most insightful, innovative, digital, and admired finance team in the technology industry," says Hayli Hay, Director of Connected Forecasting & Planning at Autodesk.
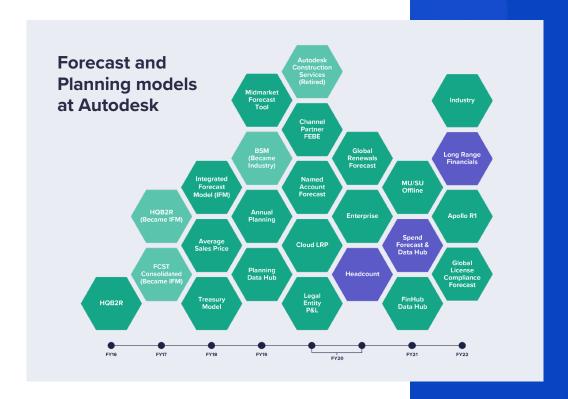
With leadership direction to "connect, optimize, and automate," the team at Autodesk that works on Anaplan is driving the future of finance as a partner to the business while creating financial career paths that embrace new technologies to provide real-time insights and financial reporting. Since 2015, the company has used Anaplan within several internal functions; go-to-market finance, financial planning and analysis (FP&A), treasury, and global revenue operations lead its Connected Planning and forecasting environment, which is continuously evolving and improving, building success upon success.

For example, one early sales planning use case was leveraged to enable Autodesk's changeover from perpetual to subscription licensing. It's no small feat to move a multi-billion-dollar company from a revenue-based plan to one built on multiple metrics such as annual recurring revenue (ARR) and annual contract value (ACV). The need to forecast sales along multiple lines—including license type, local currency, geography, and product—added further complexity. The result was dramatic: The Anaplan-based process cut forecast roll-up time by 80%, even though the process itself was much more complicated.

That's just one success story from Autodesk's years of innovation and transformation. As a result of the investments Autodesk is making with Anaplan, and the hard work across the finance teams, the Anaplan footprint is increasing – and that means progress toward the "Future of Finance." In August 2021, Autodesk migrated the entire resource planning process into Anaplan with the launch of the Spend Forecast Model. The result of cross-functional effort across multiple teams, Spend Forecast is Autodesk's largest and most impactful Anaplan model to date, built completely using Anaplan's new UX and leveraging cutting-edge HyperModel functionality. It builds on Autodesk's workforce planning model to automate monthly spend forecasting and approvals for over 70 end users in FP&A, eliminating outdated legacy tools and minimizing exposure to workflows built on spreadsheets and email.

Hayli Hay, Director of Connected Forecasting & Planning, Autodesk

Forecast and Planning models at Autodesk

Hexagon map of Forecast and Planning models, arranged across fiscal years FY16–FY22:

- Autodesk Construction Services (Retired)
- Midmarket Forecast Tool
- Industry
- Channel Partner FEBE
- BSM (Became Industry)
- Global Renewals Forecast
- Long Range Financials
- Integrated Forecast Model (IFM)
- Named Account Forecast
- MU/SU Offline
- HQB2R (Became IFM)
- Annual Planning
- Enterprise
- Apollo R1
- Average Sales Price
- Cloud LRP
- Spend Forecast & Data Hub
- FCST Consolidated (Became IFM)
- Planning Data Hub
- Headcount
- Global License Compliance Forecast
- HQB2R
- Treasury Model
- Legal Entity P&L
- FinHub Data Hub

Timeline: FY16 — FY17 — FY18 — FY19 — FY20 — FY21 — FY22

The environment today—but don't blink

The Anaplan Forecast and Planning team at Autodesk consists of individuals Hay calls "finance engineers" who have a deep understanding of both finance and the technology that supports financial processes. They built and operate 18 Anaplan models and three Data Hubs in four categories across go-to-market finance, FP&A, and treasury:

- **Forecasting models** focus on revenue-related activities in the current fiscal year. These solutions pull sales opportunity data from Salesforce, and their output flows into systems in Tax and Treasury and other departments. The forecasting models are not monolithic; because Autodesk has multiple product offerings and a variety of sales motions, the team maintains several revenue-forecasting tools in Anaplan that are fine-tuned for individual business units.

- **Planning models** are used to set company-wide top-line metrics on a two- to five-year timeframe. Like the forecasting models, the planning models employ specific logic and methodologies for different areas of the business, and yet they bring that data together into a harmonious single view for corporate-level planning.

- A growing collection of **workforce and spend forecasting models** capture the company's entire spend in Anaplan, allowing Autodesk to retire SAP BPC and minimize spreadsheet and email workflows for a large user base.

- **Support models** provide data and logic that is shared across the Anaplan environment. They include an allocations tool, a centralized pricing tool, and three Data Hubs, one of which automates 40+ routine data integrations between Anaplan and upstream and downstream financial systems including SAP S4 HANA.

Forging the future of finance

Autodesk's company-wide desire to be an industry leader and an appealing place to work is reflected in the company's Future of Finance initiative, championed by CFO Debbie Clifford. The initiative has seven pillars:

- Touchless transactions
- Self-service platform
- Real-time financial reporting
- Real-time insights
- Connected planning and forecasting processes
- Workforce of the future
- Single source of truth

Although Autodesk's Anaplan implementation resides within the connected planning and forecasting processes pillar, it touches or supports at least four additional pillars: real-time financial reporting, real-time insights, workforce of the future, and single source of truth.

"We talk about every new Anaplan project by asking, 'How does it advance the Future of Finance goals?'" Hay says. "The guidance from leadership is to rally together to build bridges among these pillars, ensuring that teams are working collaboratively, not disparately."

"Our plan is to extend the Anaplan ecosystem to become truly end-to-end across the planning and forecasting spectrum," says Matt Chapman, Senior Director, Finance. "We know that by consolidating our finance-wide planning and forecasting efforts onto a single, cloud-based platform, we benefit from unified, connected workflows that increase our ability to make better decisions faster."

And although that vision brings immediate benefits, there is also a powerful long-term impact. "Autodesk is focused on creating career paths for people in finance," Hay explains. "It's part culture and part technical innovation."
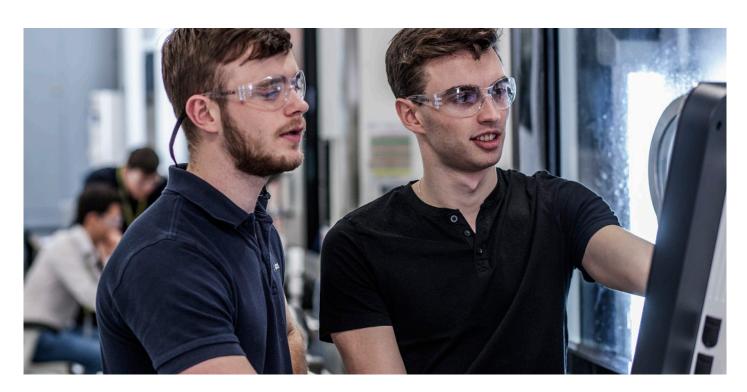
In Autodesk's Global Revenue Operations, eight Anaplan models enable teams worldwide to set sales quotas, build portfolios, evaluate deals, generate forecasting models, and more. "With Anaplan, we are delivering on the promise of turning data into insights," says Damian O'Farrill, Director of Data Science and Revenue Analytics. "We've leveraged the native capabilities of Anaplan and augmented them with machine learning, allowing us deliver a better customer experience using data science."

Highlights of those models include:

- The **Enterprise Modeling Tool** (EMT), a deal desk model that establishes pricing and terms for enterprise license agreements (ELAs). Originally launched in 2018, EMT incorporates price, discounts, revenue recognition rules, and other dimensions to generate deals that are positive for Autodesk and attractive to its customers.
- **Compensation models** help sales leaders carve out and consolidate sales quotas for teams worldwide. This is done in partnership with finance based on historical billing data.
- **Sales Portfolio Optimizer** uses Anaplan Optimizer to ensure that tens of thousands of Autodesk customers who are not under ELAs—typically midmarket and territory accounts— receive excellent service from Autodesk's sales teams. Although relatively new, this model already delivers a substantial productivity improvement: The portfolio-balancing process was manual and time consuming because it was custom-built using Python. "With Anaplan Optimizer, yearly changes to the go-to-market strategy can be implemented easily," O'Farrill says. "The model allows for integration of several data science inputs, resulting in augmented intelligence that makes the process faster and more scalable." Now that Anaplan is connected to Autodesk's data lake, the process is even more powerful and real-time than ever before, allowing millions of accounts to be processed in a week.

Global Revenue Operations models at Autodesk

- Enterprise Modeling Tool (EMT)
- Sales Portfolio Optimizer
- Next Generation Partner Incentive
- Partner Incentive Master Data Mgmt.
- Allocation & Quota Model
- Quota Setting—Named Accounts
- Sales Data Hub
- Mustang Master Data Mgmt.

The use case list and honeycombs above represent a snapshot in time because the Anaplan environment at Autodesk is constantly evolving and growing. (See "Staying on track through change," at right.) This continuous improvement is supported by an Anaplan Center of Excellence and several Master Anaplanners who provide governance, ensure that all models share a similar user experience, and that the overall environment drives business process alignment, workplace efficiency, and informed decision-making.

As a result of this smart, strategic operation, Autodesk's Anaplan experts have become industry leaders. They're active presenters at Anaplan webinars and events, and valued participants in early access programs for new Anaplan features.

Amazing agility replaces urgency

The teams' vision and focus have produced an Anaplan environment that is agile and powerful without being burdened by complexity. The thoughtfully crafted architecture enables the company to make large-scale changes in finance and sales processes easily. "With Anaplan, we were able to implement an entirely new company compensation strategy in the workforce model with simple changes to the master data in various lists and a source system integration query change," Hay recalls.

Another example of this agility—one that many companies can relate to—arose when Autodesk needed to make substantial pandemic-driven strategy shifts just weeks after annual planning was completed in early 2020. As it became clear that COVID 19's effects on the business would be felt for an extended time, scenario planners using Anaplan were able to adjust the assumptions underlying the completed annual plan. "As we began navigating the new COVID environment, we were able to treat it like another forecast, as opposed to a massive, disruptive fire drill," recalls Matt Chapman, Senior Director in Finance at Autodesk. "With Anaplan, we rebuilt the financial plan without significantly disrupting the business. It was pretty amazing."

Hay agrees that Anaplan has enabled the finance team to adapt to change in an agile way, even to the point of anticipating and addressing challenges before they arise. "Our goal is to reduce pain, uncertainty, and doubt for employees because we already have a solution," Hay says. "We're able to do that with Anaplan."

Improved agility is just part of the story. Multi-dimensional models in Anaplan accommodate the growing scale and complexity of Autodesk's business, and Anaplan's modern, secure architecture satisfies the needs of both business users and their IT colleagues. The ability to apply statistical algorithms to historical data and external datasets, along with support for artificial intelligence (AI) and machine learning (ML) initiatives, results in timely, accurate, and reliable forecasts. It also means that the data that underlies

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>
> **Matt Chapman**
> Senior Director, Finance

Staying on track through change

"There's one thing that is a constant at Autodesk, and that is change," says Hayli Hay, Director of Connected Forecasting & Planning at the company. "Having Anaplan has been very helpful in staying ahead of and responding to change." Constant business change requires the Autodesk team to be flexible and intentional in how they build and maintain their Anaplan environment. The team uses these methods and tools to stay on track as business conditions evolve:

Alignment. Autodesk's success with Anaplan relies on several types of alignment between and among many groups. Clear **lines of communication** empower business teams to raise issues and improvements to the right people who can address them; **business process** alignment requires engagement with the business to ensure that business methods are understood and built into model designs; a **human-centered approach** to model design involves the end users of a model in its creation; and **knowledge sharing** and use of best practices within Autodesk's internal Anaplan team ensure that any additions support a "connect, optimize, automate" mantra.

Backlog grooming. With a rolling queue of about a dozen new model-build requests, the Autodesk team carefully considers integrating new functionality so it doesn't add unnecessary complexity to the Anaplan ecosystem. Discussing and prioritizing the desired projects ensures that the most strategically important projects get the team's time. Backlog grooming is done in collaboration with the business, and with attention to the entire Anaplan ecosystem and the team's future vision, not just the task in hand. "As your ecosystem grows, you need to continue maintaining what you already built," Hay points out. "It's not just the upfront build time, but also the love and care the Anaplan models require on the back-end that you need to consider before committing to a new build."

Agile frameworks. The Autodesk team swears by the Anaplan Way, but they also must remind themselves that agile methods—while typical in software development—are new for many business teams. Taking the time to educate them on agile methods and benefits has been a good investment and is leading to faster cycle times.

The right team. Everyone at Autodesk who builds the Anaplan environment has subject matter expertise and must earn Anaplan certification. Outside consultants can help, but having "people on the team who are ingrained in the Autodesk experience every day" is supremely important given the substantial environment complexity the team must manage and maintain, Hay says.
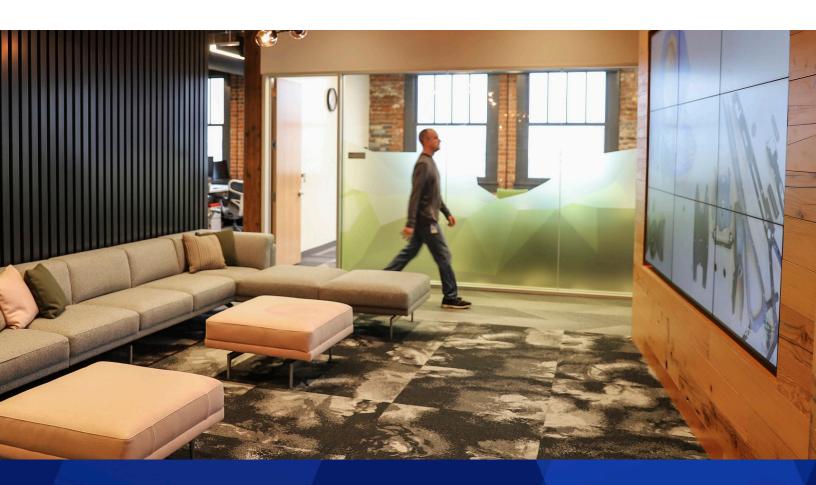
Autodesk's plans is more detailed and granular. The result is less noise, greater trust in data, and an enhanced ability for decision-makers to focus on meaningful work. "Anaplan enables people to have insightful conversations around the business and customer needs, as opposed to debating the numbers," Chapman says.

This creates an environment that generates greater satisfaction for Autodesk employees and customers—and supports business growth. As Hay states, "There's a lot moving around in the world, and having the ability to model different financial scenarios and make fast decisions is really important for our company's leadership."

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Hayli Hay
Director of Connected Forecasting & Planning, Autodesk

About Anaplan

Anaplan, Inc. is a cloud-native enterprise SaaS company helping global enterprises orchestrate business performance. Leaders across industries rely on our platform—powered by our proprietary Hyperblock® technology—to connect teams, systems, and insights from across their organizations to continuously adapt to change, transform how they operate, and reinvent value creation. Based in San Francisco, Anaplan has over 20 offices globally, 200 partners and approximately 2,200 customers worldwide.

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