



DocuSign Integration



Whether you are negotiating a contract, growing your workforce, or managing logistics, you need an iterative workflow that works within, across, and outside of your organization. You need to work with partners, candidates, and suppliers and complete transactions with speed, security, and precision.

Anaplan's DocuSign Integration lets you manage reviews and approvals electronically while you update plans in real time. Anaplan's secure and efficient workflow capabilities close the gap between planning and execution—and let you complete cycles faster—by connecting data, people, and plans. Gain a competitive advantage by hiring candidates and closing deals faster, thanks to the combination of Anaplan's intuitive planning platform and DocuSign's electronic signing capabilities— and do so without additional training, logging, or IT involvement. Connect entities inside and outside of your organization and execute tasks in real time.



Plan and complete tasks with greater speed, security, and precision. Complete an end-to-end planning process using an iterative workflow designed for flexible collaboration and solid integration, using Anaplan's scalable platform that supports transactions inside and outside of the system. Close the gap between planning and execution to seize opportunities and gain a competitive advantage as you hire top talent, close deals faster, and sign contracts well ahead of your competition.

Build stronger collaboration within, across, and outside your organization so your business leaders can act with trust and confidence. Use the power of DocuSign to collaborate with multiple entities using role-based access and security, managed through single sign-on (SSO). Enable only designated individuals to review, sign, and approve documents. The Anaplan cloud platform conforms to industry security protocols for maximum interoperability with other SaaS applications.

Leverage easy-to-use, self-service capabilities. Business users enjoy an intuitive user experience and seamless integration between DocuSign and Anaplan. It enables them to act quickly and complete tasks in a timely manner.

Key benefits

- Gain a competitive advantage and increase time to value as you track your document workflow in real time with seamless integration between DocuSign and Anaplan.
- Streamline collaboration between functions within, across, and outside of your organization.
- Increase efficiency by connecting people across different geographies; remove physical barriers to review, approval, and distribution of documents.
- Act quickly and complete tasks in a timely manner with trust and confidence while adhering to industry-standard security and compliance.
- Deliver a consistent end-to-end experience that empowers business users to leverage connected planning.

CUSTOMER STORY

Benefits

- Shorter cycles to review, sign, and approve documents and update plans.
- Better collaboration within, across, and outside of your organization.
- Strong integration between DocuSign and Anaplan, with easy-to-use self-service capabilities, helps you distribute the right documents to the right people at the right time.

“Anaplan has had a huge impact on our team’s efficiency and ability to quickly pull and present data.”

A tech company
Financial Planning and Analysis Manager



Key features of the platform

One platform to drive connected planning where you need it most—across all lines of business

Anaplan's cloud planning platform enables an organization to run virtually any planning process by connecting data, people, and plans across every part of a business. Anaplan's platform is the most flexible, scalable, and collaborative cloud planning system in the world today.

Strengthen trust in data by integrating and gathering all planning information in one place

Anaplan's platform enables you to bring in any data of any volume from any source so business users can make the right decisions. Though analytics enable you to react to events in real time, you look to trusted, high quality data for an accurate picture of the business. It is through this data discovery journey that you can make confident business decisions based on accurate visualizations and insights.

Smart analytics with deeper insights at enterprise scale

Access trusted, clean, and relevant data to make the right business decisions through smart analytics. Scale up or drill down into the data while modeling and planning. Identify key trends and patterns to gather insights using the visualization environment on the platform. Build a strong analytics culture to drive user success with data discovery.

Lifecycle management

Provide precision and control while streamlining the design, development, testing, and delivery of planning models and forecasting scenarios.

Open data integration options to centralize data

The Anaplan platform promotes an open integration approach. Anaplan HyperConnect leverages the technology of Informatica Cloud, which enables business users to easily connect to hundreds of data sources and bring data into planning models with just a few clicks. Anaplan also supports data integration services provided by MuleSoft, Dell Boomi, and SnapLogic through its connectors. Businesses can also leverage Anaplan API services to build their own connections.

Real-time reporting and dashboards for visual insight

Quickly assess the health of your business with rolebased, built-in dashboards and analytics for at-a-glance insight (e.g., charts, graphs, maps, waterfall, and more). Complete financial reporting (P&L, balance sheet, cash flow) across plans, actuals, and forecast for real-time, integrated reporting. Pivot reports by any dimension (time, geography, product) for custom views on-the-fly.

Scalability provides granularity of insight

Only Anaplan offers scalable in-memory technology able to handle tens of billions of cells in one model and recalculate a billion numbers in less than a second.

Data and metadata management

Data and metadata management uses Business Map, which visually captures the relationships and interconnectedness between data and plans to help business users and IT administrators manage their planning landscape.

Application integration

Get easy access between Anaplan and third-party applications. For example, Tableau visualization and analytics, driven by Anaplan data, enables informed decision-making. DocuSign integration enables users to send, track, and sign documents securely and efficiently.

Self-service UI for modeling, analysis, and “what-if”

Enable end users to easily create and modify complex models and “what-if” scenarios on-the-fly that answer complicated quantitative questions and span multiple areas of the business. Create simple, real-language formulas—no coding required. Drag-and-drop hierarchy changes with immediate effect, with no dependence or burden on IT.

Security and compliance

The Anaplan platform is built on a single, highly available, continuously monitored, secure cloud platform and infrastructure. It features user role-based access control and user management, and single signon support with SAML 2.0 compliance. Get best-in-class security and compliance with ISO 27k certified and/ or SOC audited facility data centers, disaster recovery, and full data encryption. Businesses can plan with confidence, knowing that Anaplan follows industry best practices for testing and auditing of security and confidentiality, with annual third-party penetration tests and ongoing vulnerability scans.

About Anaplan

Anaplan, Inc. (NYSE: PLAN) 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, 175 partners and approximately 1,500 customers worldwide.

To learn more, visit anaplan.com

