



CASE STUDY

CHALLENGES

Penumbra, a global medical device company, was not new to Anaplan. Penubra had a previous implementation of Anaplan that was built by another partner. That implementation was not successful for Penumbra's needs. After struggling with their current implementation for 3 years, Penumbra was not sure if they would continue to renew their contract with Anaplan. Anaplan reached out to Allitix to salvage this contract.

Employees at Penumbra could not work with the current implementation; It was too complex, and it was not manageable. The implementation was not tailored to Penumbra and when Allitix began the project, it had to be completely rebuilt.

Penumbra is growing quickly, so they desired a solution that was scalable with their growth. They also needed to change how data was pooling and dispersing. Data was being pulled differently for similar functions and creating multiple versions of the truth. This means that strategic finance, demand planning, and marketing were all pulling reports that had different revenue information. Each department was pulling their pertinent data, but it was not accurate as a whole. Data needed to be defined for accurate and consistent reporting.

Penumbra's planning process was timely and needed structure. To start the planning process, data would need to be updated in Excel first, time was spent compiling information rather than analyzing and planning around it. There was an insufficient governance on source system data architecture. Critical reporting could not be completed on time or accurately.

 **Failed initial implementation**

 **Spreadsheet/ manual processes**

 **Time wasted gathering data**

 **Could not grow in current process**



SOLUTION

Penumbra still believed that Anaplan could be successful with their planning and forecasting needs, if implemented correctly. They trusted Allitix to completely rebuild and create a new model.

Allitix created a very complex aggregation and allocation system. This model would create a single unified truth, rather than different departments coming to different conclusions. The new model enabled levels of interaction and input at different levels of product and geographical structure based on group demands. The implementation made it possible to pull reports in real time, rather than manually extract and allocate information. Penumbra could also uplift their dimensionality for enhanced planning and reporting purposes, finding data that did not exist before. Real time reporting allowed Penumbra to reduce bottlenecks and brought attention to issues in real time. Issues can be tracked and solved before they grow into larger problems.

Allitix enabled Penumbra to have a structure that would grow with their high growth company. The flexibility and accuracy Penumbra needed to continue their rapid growth was achieved in this model.

✓ **Single unified truth**

✓ **Reporting in real time**

✓ **Ability to grow and change business processes**

✓ **Problems tracked and solved immediately**

RESULTS

Allitix' implementation gave Penumbra the opportunity to completely reinvent their planning process. Penumbra has access to real time information, rather than waiting for data to be collected and allocated. Time that was spent extracting data from various sources, can now be spent analyzing data and constructing a plan. There is now data visibility that did not exist before. Penumbra can track where numbers came from and why they were being pulled differently, rather than having multiple versions of the truth. Data is being leveraged by the COGS group to accurately forecast for costs and demand. Pulling data in real time also gave Penumbra the opportunity to become aware of issues as soon as they arise. With the ability to stop and solve issues before they grow, they are getting better data and more accurate reporting.

This implementation was so helpful to Penumbra, that it has prompted other use cases related to territory and quota, cost center planning, and headcount. Allitix will continue to work with Penumbra and help with their planning and forecasting needs.



ABOUT ALLITIX

We are a people-driven consulting firm which prioritizes the goals and vision of our clients but also invests to empower its individuals. Our guided approach enables our clients to deliver immediate project results while providing them the knowledge and skills to maximize and drive future success.

- We are focused on people.
- We help you stay one step ahead.
- We are in this together.

WHAT WE DO

1. STRATEGY & OPERATIONS

We help our clients see the bigger picture through planning and analytics.

2. TECHNOLOGY ENABLEMENT

We give your users and model builders the tools and resources needed to build a true connected planning process across your organization.

3. BUSINESS PERFORMANCE MANAGEMENT

People, process, technology, & data are the pillars of performance management. We help you lay the foundation which scales for success.