Anaplan

Utilizing the U.S.E.R. Deployment Methodology to transition to the UX

Introduction

The Anaplan on Anaplan (AoA) team is responsible for connecting planning, strategy and execution to quantifiable metrics at Anaplan, increasing our business performance and outcomes.

In short, we are Anaplan's own Center of Excellence (COE), and our models demonstrate how our platform capabilities continually optimize our results by enabling best-in-class planning. As new features or enhancements to the platform are released, we act as "Customer 0," leveraging new features to both understand and promote their full potential – making sure we know how they will impact the way Anaplan is currently used.

With the release of Applications, Boards, Worksheets, and the whole suite of accompanying features, we were eager to transition our current portfolio of classic dashboards into the new and improved user experience (UX).

> Anaplan on Anaplan works to leverage new features to both understand and promote their full potential

Here are five major benefits we found by transitioning

1. **Dynamic Display Access**
   - Our users can now access key pages from desktop, tablet, or mobile devices
2. **New Visualization Capabilities**
   - New charting and data display capabilities such as KPI cards, forms, Gantt charts elevated our users' planning experience, particularly for our key executive reports
3. **Cleaner User Experience and Simpler Navigation**
   - "So fresh, so clean" – Our users have found it much easier to complete their planning processes with more intuitive navigation
4. **Page Customization Options**
   - Elements such as font style, colors, etc. have given us more flexibility to create "wow" moments for our users
5. **Ability to Reference Multiple Models Across Workspaces**
   - We now draw better, more powerful insights by accessing all of the information we need in a single app

Our Approach

Given the large number of models and classic dashboards utilized internally (we have over 100 unique models across 20+ functional areas!), we had to develop a transition plan that would allow us to enjoy the benefits of the UX without disrupting our many model owners. Luckily, our internal teams developed the U.S.E.R. deployment methodology, which we utilized throughout our transition:

Understand the value

- We identified our most visited dashboards by leveraging data from both our HyperCare Reporting Model and utilization reports available via Splunk. This helped us prioritize the most impactful place to start our transition.
- Once the dashboards and the models they belonged to were identified, we connected with the model owners to assess their availability and any in-progress UX transition plans.

Sketch the design

- Once model owners committed to the transition, we developed a timeline that would enable model owners to get trained, gather requirements, design, build, and gather feedback.
- We supported our model owners in designing the new UX pages, encouraging them to be unconstrained by how existing dashboards looked. Rather, they should focus on the requirements and think about what the planning process looks like for the end user.

Execute the plan

- Once model owners were comfortable with their design, they got started building in the UX.
- To ensure lessons learned could be shared across the various model owners, and to encourage standardization in terms of format and design, we held regular cross-functional checkpoints and documented lessons learned to be shared with the broader AoA community of model owners and end users.

Repeat the process

- After the first round of dashboards transitioned to the UX, we went through the same exercise above to identify the next group of most visited dashboards, following a similar planning, design, and build timeline and process.

Overall, the exercise of making the transition from classic to the UX encouraged model owners to re-evaluate what dashboards and dashboard components were most utilized and valued by end users. As a result, we not only created a cleaner, streamlined user experience, but we also were able to clean up many models overall.