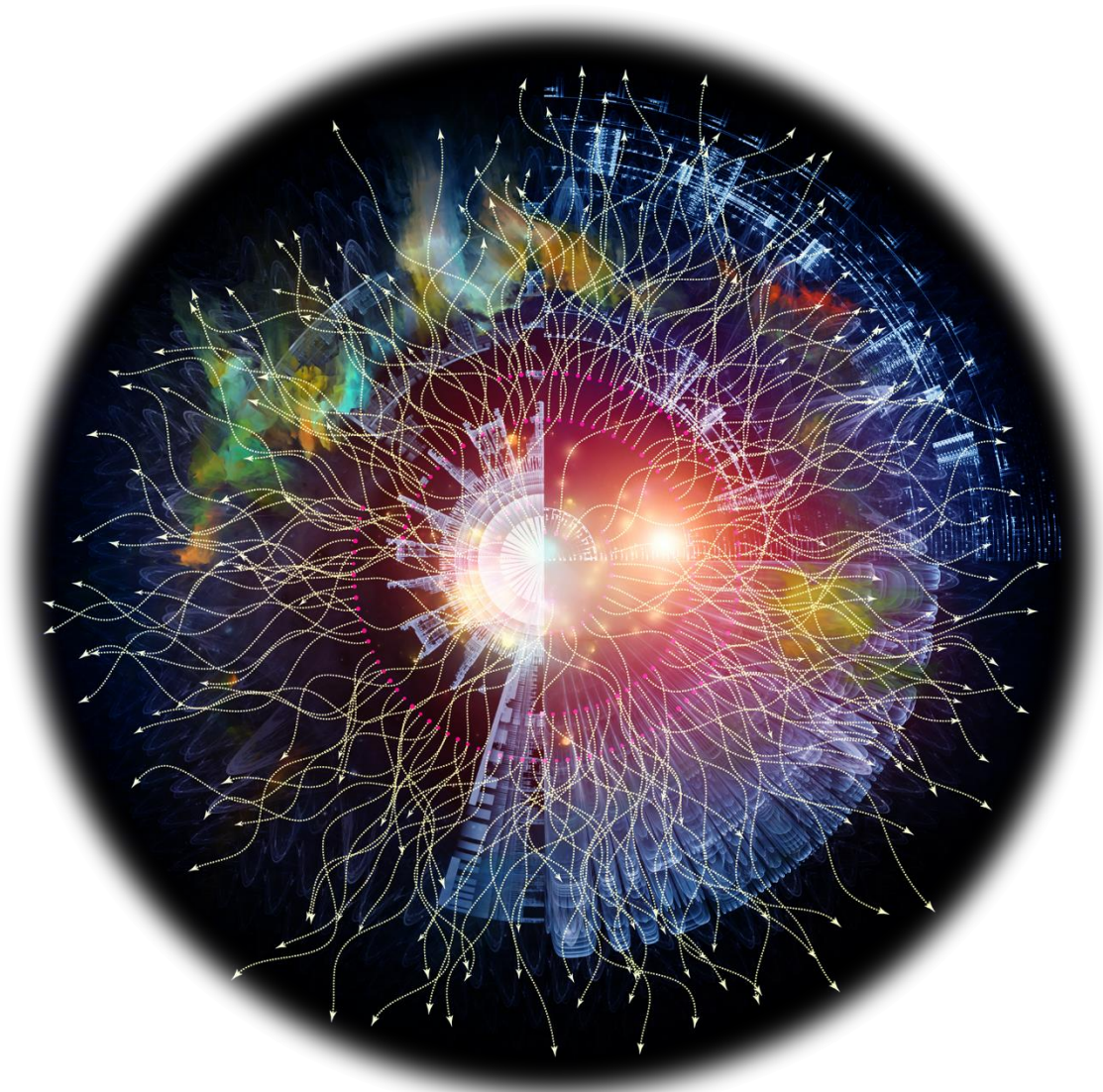




Anaplan Planning Implementation Services

G-Cloud 15 Service Definition Document

January 2026

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1 Deloitte Overview

As a leader in professional services, Deloitte LLP is committed to making an impact to our clients, our people and for society. We have over 27,000 staff based across the UK providing audit, risk advisory, tax, consulting, financial advisory and legal services to public and private clients across multiple industries. We work together to build trust, support inclusive growth, and build capability, enabled by our **breadth and depth of expertise across advisory, delivery, engineering and managed services.**

Our **public sector practice** serves Central Government, Government Agencies, Local & Regional Government, Defence, Security and Justice, Health and Social Care, Transport, Education and Housing. We also provide services to the Northern Ireland Office, Scottish Government, Welsh Government and Crown Dependencies.

Our Cloud Capability

At Deloitte, we help our clients **Imagine, Deliver and Run** the businesses of the future through the power of **Cloud**. We have deep Cloud architecture, engineering, operational, commercial, and business transformation expertise delivered by a team of more than 26,000 Cloud Practitioners globally. We have delivered over 2,000 cloud implementations over the past 5 years and have 60+ cloud centres of excellence supporting the delivery of cloud services to our clients.

In the UK, we have a team of over 100 Cloud managed service specialists plus the following certifications across AWS, Microsoft Azure, Google Cloud and Oracle Cloud Infrastructure (OCI):



We help our clients with all aspects of their journey-to-cloud and optimisation of their cloud and cloud-services investments. Our Cloud practice can support you to optimise your client investments, and to navigate your organisations cloud journey, providing specialist cloud architecture, engineering, and operational skills at all stages, with a large proportion of our team holding the clearances required to meet your specific security requirements.

Our AI Capability

Deloitte stands at the forefront of AI transformation and was recognised as a Leader in the 2025 IDC MarketScape for Artificial Intelligence (AI) services for the fourth consecutive time. Supported by a £3 billion investment in AI, Data, Automation, Cloud, and Cyber, we seamlessly integrate our deep AI expertise with our extensive cloud capabilities. Our UK team is part of 339K AI-fluent practitioners globally, and includes over 1,300 AI specialists and engineers, many of whom hold the necessary security clearances for public sector delivery.

Through the Deloitte AI Institute, our hub for cutting-edge research and innovation, and strategic alliances with leading hyperscalers, we empower public sector clients to optimise costs, streamline processes, and navigate their AI journey. We achieve this by leveraging our ReadyAI™ models, which provide end-to-end support for AI solution implementation, and our Trustworthy AI™ framework, ensuring responsible and ethical deployment.

Our alliances & ecosystems

To bring full value to our clients, Deloitte is a premier consulting partner with all the leading hyper-scale cloud vendors in the market including AWS, Google, Microsoft¹ and SAP. A selection of our partners and alliances are presented below:



What the analysts say

Don't just take our word for it. Deloitte is recognised by the analyst community as being **leaders in cloud transformation services**. This reflects the wealth of experience we have in delivering cloud services across the public sector and wider private sector combined with our out-of-the-box templates, tools and assets.

Gartner

Originating in 2021, Deloitte has been recognised as a Leader in this category for four years in a row. Deloitte was also positioned as a Leader in the **Gartner Magic Quadrant for Public Cloud Infrastructure Professional and Managed Services, Worldwide** in 2021, 2020 and 2019, the previous form of this category.

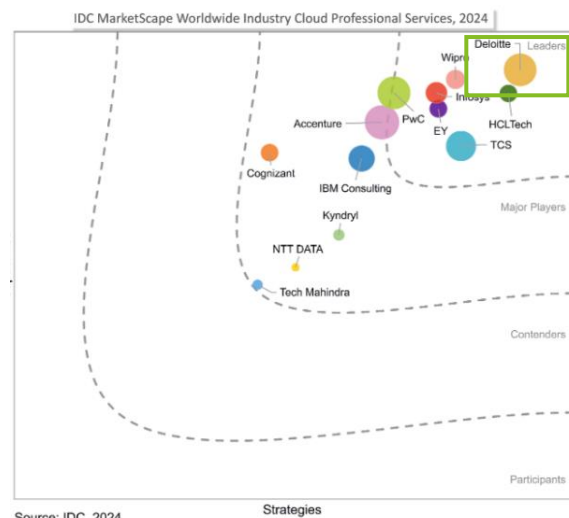


Gartner

Gartner: Magic Quadrant for Public Cloud IT Transformation Services. © Gartner inc. 2025

IDC

Deloitte has been awarded Leader status in the **IDC MarketScape: Worldwide Industry Cloud Professional Services 2024** Vendor Assessment. We have also been recognised as Leaders in **Hybrid IT Consulting & Integration Services** and **Software Engineering Services**.



IDC MarketScape: Worldwide Industry Cloud Professional Services Vendor Assessment © IDC inc. 2024

Cloud Transformation

Transform Faster, Transform Smarter

Deloitte's Cloud Transformation can fast-forward your journey to the Cloud, unlocking innovation, efficiency, and growth.

[Find out more here](#)



¹ As Microsoft's Independent Auditor, Deloitte cannot have a direct or material indirect business relationship with Microsoft, such as having an alliance or being a registered partner. Nonetheless, Deloitte can provide Microsoft-related technology services and invests heavily across its global business building technical skills and capabilities to develop world-class consulting and solution delivery capabilities.

2 Service Overview

Overview

Deloitte brings thorough knowledge of successfully delivering finance transformation solutions at multiple public sector organisations. One of the key aspects of finance transformation is Enterprise Performance Management (EPM) which enables organisations in performing detailed financial analysis. Through these services, organisations can benefit from our expertise irrespective of where they are in their finance transformation journey. It can be standalone EPM implementation; as a part of overall ERP and EPM transformation; implementation support; optimisation of existing solutions; or any bespoke or ongoing requirements to enhance existing EPM capabilities.

We cover the full range of Anaplan Planning solutions through our offering –

Financial Planning & Analysis

Workforce Planning

Management Reporting

Dashboarding

Scenario Analysis

Modelling

Planning, Budgeting, Forecasting

Key features

We offer a complete end to end solution covering all the processes of Anaplan implementation. Our Planning and Budgeting solution is robust and enables self-serviced budgeting and forecasting process for budget holder. At the same time, it empowers finance team in ensuring the quality and timeliness of the overall process is up to high standards. Our solution is scalable and futureproof which makes it easier for the system administration team in maintaining and expanding the reach of the solution in future. Covering Budgeting, Forecasting, MTFS, Savings, Workforce Planning & Forecasting, Budget Transfers etc. our solution covers all the aspects related to Planning & Budgeting comprehensively.

Our reporting solution uses Anaplan dashboards and worksheets to enable public sector organisations in increasing the efficiency, usage and comprehensiveness of their reports. From creating budget books, to MTFS reports, our reporting solution will address all your requirements of reporting.

Benefits

The benefits from Deloitte Enterprise Performance Management solution are significant and long term. We work collaboratively with you to understand your business issues; we are experienced at delivering best practise solutions that generate tangible, measurable benefits that have a major impact on your budgeting process. Key benefits of using Anaplan planning Solution –

- Automated and self-serviced budgeting and forecasting process
- Scalable and future proof solutions to ensure long term benefits and return on investment
- Intuitive visualisation of dashboards, reports and KPIs to enable better decision making
- Integrated and automated data load process
- Automated calculations to enable FP&A with minimal data input of high volume
- Easy to use solution to enhance user experience

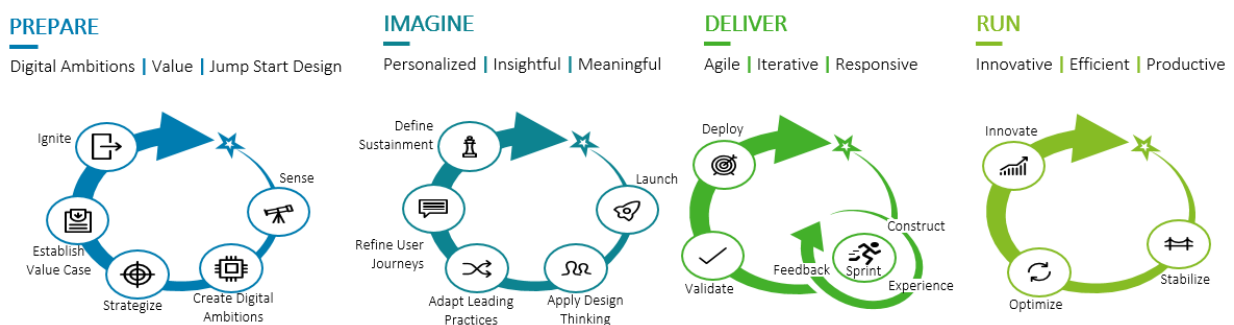
3 Detailed Service Description

Our Approach

Our approach is designed to be flexible to meet client's unique requirements while following best practice implementation approach in combination with Deloitte prepare, imagine, deliver, run framework.

Please see below for our general approach. Depending on the context and the nature of the existing architecture not all activities may be necessary:

- **Prepare:** Interactive sessions with stakeholders to mobilise the project, collect the requirements (functional, non-functional, technical/system), agree on data strategy principles.
- **Imagine:** Deep-dive sessions with key stakeholders to get the insight into the current state of the process, required solution, pain-points and assess the maturity. The output of this session is visualising the final Planning & Budgeting or other EPM process solution, roadmap, expected benefits, approach and plan with design decision.
- **Deliver:** We follow Agile or hybrid methodology as per client's preference and suitability to overall goals of the project. Core solution is based on the design decisions taken, user journeys, process flows.
- **Run:** Releasing into production environment with comprehensive training and communication for the solution to stabilise successfully and ensure business value is realised. Deloitte can also provide managed analytics support.



Solution Offering

Whilst Deloitte offers implementation and support services for all the EPM processes, for this document, we will be talking in detail about our Anaplan Financial Planning & Analytics solution. We are also open for further discussions on other processes based on requirements.

Our Planning and Budgeting solution is configured on Anaplan Planning, leveraging the best in market features which enable smooth and accurate preparation of budgets and forecasts. Key solution aspects of our Anaplan Planning solution are listed below:



Budget Setting

Our solution enables creation of both Workforce and Income & Expenditure budgets. Users can choose to do an incremental or driver-based budgeting process based on their requirements. The budgets can also be calculated automatically or entered manually. Users can also choose to use system calculated budgets and then modify them as per their needs. Finally, the budgets prepared can be profiled as per choice and the approved budgets can be written back to your ERP application.



Budget Forecasting

The Deloitte Budget Forecasting solution is automated and ensures to generate accurate results with minimal data input. Our solution offers users to select from a list of calculation drivers which automatically generate the overall forecast. The profiles can be setup at Cost Centre level or more granular level as well. We completely understand that not all departments can benefit from same calculation drivers and that one size may not fit all. Therefore, our solution also offers the capability to setup exceptions for calculation drivers to address more custom requirements of divisions



Capital Budgeting

For capital budgets, our solution offers a comprehensive way of budgeting for projects by program and for future years. With capability to track funding and have details on usage of funding, users can have a comprehensive budgeting experience combined with using features such as entering comments or adding attachments



Capital Forecasting

Capital Forecasting enables users in tracking their expenditure against the budget and also to be able to define how funding will be utilised for the remainder of the year and project. Project managers can also use our calculation drivers for the system to generate a forecast and then to modify it as per need



Savings

Our savings solution model enables public sector organisations in arriving at a saving target for the next three years by looking at various current and future initiatives. The savings model runs for 3 years on a rolling basis and organisations can create plans and forecasting on savings to identify an overall savings in expenditure



MTFS

The MTFS forms part of the core of our solution and will enable our public sector customers in preparing long and medium terms financial strategies by factoring in multiple aspects of the organisation. Our MTFS solution can allow you to go for 10 years planning or even 5-year planning.

Our solution offers many other processes within the Anaplan Planning solution and would be happy to discuss our solution in detail.

Inputs

We have assumed that you will be able to provide certain inputs to the service, which we have listed here. If you are not able to provide all these inputs then we can discuss options and alternatives, as it is likely we can reach agreement to alter our approach to accommodate your situation.

- Provide details on current process, timelines, people involved, pain areas and key calculations
- Stable and established Chart of Accounts structure
- Share current process documents, templates used, and calculations performed
- Share the data required for performing budgeting and forecasts
- Share list of currently used reports along with their format, usage and dummy data to assess the reporting requirements.

Your Contribution

Our services are designed to be delivered with you rather than to you. We have assumed that you will be able to make the following contribution to the work. If you are not able to take on these responsibilities then please get in touch to discuss options, as it is likely we can reach agreement to alter our approach to accommodate your situation.

Your contribution and guidance is vital to the success of this project. We will strongly encourage that you:

- Ensure sufficient time is given with business representatives and decision makers for any input, review and sign-off
- Ensure the project team is provided with the best available information
- Ensure the project will have access to business users and/or system administrators for the as-is assessment
- Provide the appropriate level of resources to support the project throughout its lifecycle, and ensure that staff participates in project related activities such as workshops and meetings
- Ensure review and sign-off are completed in a timely manner
- Accept that processes and decisions which do not directly relate to the project will be considered out of scope for this piece of work
- Provide effective working space for the duration of the project to optimise collaboration with the business.

Outputs

What will you get in terms of deliverables, outputs and outcomes from this service?

As required and agreed at Order stage and could include:

- Tailored functional and non-functional requirements catalogue
- Robust Budgeting and Forecasting solution
- Reduced timeline for preparation and finalisation of budgets & forecasts
- An end-to-end financial analysis solution
- Business requirements catalogue
- Functional design
- Technical design
- Test scripts
- User guide
- Admin guide
- Data migration approach (where necessary)
- Cutover plan (where necessary)
- Change management strategy and plan.

Business Context

What situations is this service designed to be used in?

This service is designed for public sector organisations that want to:

- Implement standardised and leading practice processes for Budgeting & Forecasting and Reporting
- Accelerate delivery by using pre-configured, template end-to-end solutions
- Reduce cost and improve efficiency in back office and support processes
- Improve and increase self-service through web enabled and mobile technologies
- Have a timely and well managed budgeting and forecasting process

- Improve the quality of data and management information reports.

Exclusions

Our service description above defines the scope of what we will deliver. For the avoidance of doubt, we have listed below any activities that (in our experience) are sometimes expected to be in our scope, but which are not included within this service:

- Provision of and payment for any software subscriptions or licenses
- Data / master data validation or cleansing
- Reconciliation and sign-off of historic data
- Purchasing any technology infrastructure and systems
- Extraction of data from source applications.

4 Contact Details

Please send your requirement to publicsectorbidteam@deloitte.co.uk. Alternatively, if you wish to discuss your requirements in more detail, please send us the following information and we will be happy to contact you:

- Your organisation name
- The name of this service
- Your name and contact details
- A brief description of your business situation
- Your preferred timescales for starting the work.



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