

# Center of Excellence Learning App

## Summary

The ZS Center of Excellence Learning app is the model we use to train our internal Anaplan model building resources. This training is not intended to replace Anaplan's on-demand training, but act as a supplement by expanding upon key modeling concepts. The key features of the ZS training are:

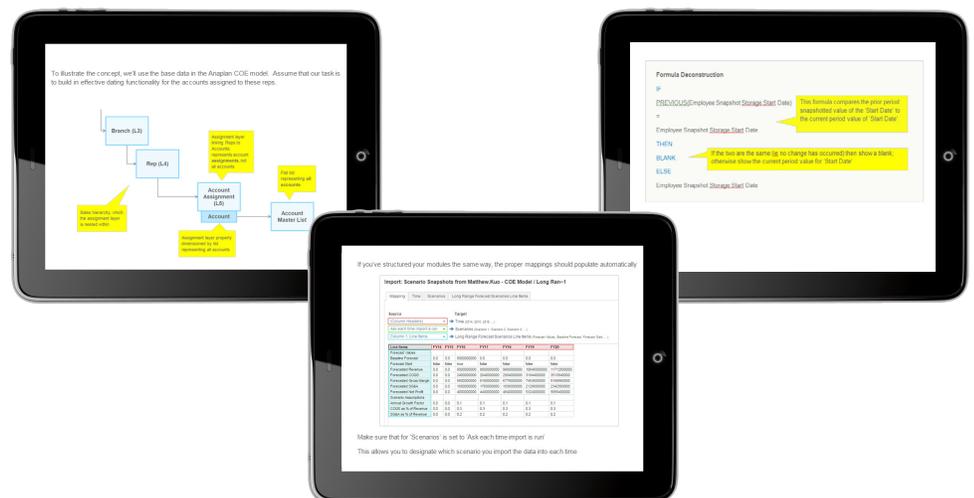
- + Topic focused
- + Limited dependency between exercises
- + Clear objectives and real world context for each exercise
- + Frequent accuracy checks
- + Overview slides to explain different techniques
- + Process considerations at the end of each exercise

Please note that the app itself is for the most part blank with a minimal set of foundational components – you will need to contact ZS to get the training materials and upload files required to complete the actual exercises.

## Topics Covered

### General Formatting Guidelines

Model building can easily become a cumbersome process without formal naming conventions and formatting guidelines. The guidelines we provide are unofficial, but are used by our firm's model builders to help maintain the consistency and accuracy of our models. Using formal naming conventions also makes it significantly easier for new users to ramp up to another person's model.



## ZS at a Glance

- + The world's largest firm focused exclusively on helping companies improve overall performance and grow revenue and market share through end-to-end sales and marketing solutions—from customer insights and strategy to analytics, operations and technology
- + More than 4,500 professionals in 22 offices worldwide
- + Partnered with more than 1,200 clients in over 70 countries
- + Over 30 years of experience

## Effective Dating

Effective dating is a key feature used in several Anaplan use cases and multiple approaches exist to achieve this functionality. Our training walks through an exercise for each of the most common approaches as well as the pros, cons, and process considerations for each method.

## Snapshotting

Snapshotting is a common technique used to store data in an Anaplan model while avoiding the use of the Versions feature. Our training covers multiple snapshotting approaches as well as documentation guidelines to make the process more transparent and repeatable.

## Key Formulas Review

LOOKUP, SUM, and SELECT are extremely useful and prevalent formulas used in Anaplan models. However, the syntax and conditions for writing these specific formulas can be difficult for Excel users to initially grasp. We'll cover the syntax of these formulas in detail and review several formula writing scenarios to make the functionality completely transparent.

## Dashboarding & Charting

While the foundational dashboarding capability of Anaplan has consistently improved upon subsequent releases, a number of hidden tips and tricks exist to improve the visual design of your dashboard. This includes the creation of histograms and custom interfaces.

## Complex Hierarchies

Non-normal hierarchies are one of the most difficult things to deal with and manage in an Anaplan model. Our training will cover the definition of a normal hierarchy for Anaplan and ways to deal with various non-normal characteristics in your hierarchy structure.

**For more information,  
please contact:**

ZS Associates  
+1 855.972.4769  
zs.anaplan@zsassociates.com