



## CASE STUDY



# ANAPLAN TRANSFORMS VITAL FARM'S FP&A PROCESS FOR ACCURATE AND STRATEGIC PLANNING

Founded in 2007 and headquartered in Austin, Texas, Vital Farms is the leading U.S. brand of pasture-raised eggs. The company also specializes in the ethical production of ghee and butter. Vital Farms began as one farm, but has grown into a network of over 200 family farms that are used to source their products.

They distribute and sell their products to a network of over 13,000 partners across North America.

As pasture-raising pioneers, Vital Farms' purpose is rooted in a commitment to Conscious Capitalism, which prioritizes ethics over profits.



### INDUSTRY

CPG, Fast Moving CPG, Ethical Food



### USE CASE

FP&A



### TECHNOLOGY

Anaplan

## CHALLENGES

Vital Farms was planning in MS Excel for their FP&A processes with no ability to guide operational planning. With limited data and poor accuracy, the financial planning was directly impacting all areas of the business.

Business processes lacked accurate forecast generation or any qualitative statistical modeling. They had an inefficient enrichments management process to capture the necessary levels of market intelligence into the forecast. Also, with zero data automation, timely and accurate data validation created numerous tracking challenges.

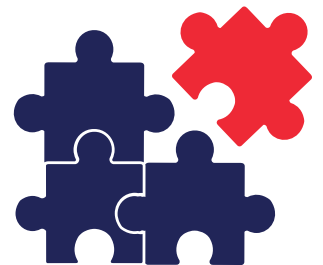
With Vital Farms moving from a privately owned company to being publicly traded, they needed a best in class budgeting solution to improve their planning cycles and financial reports.

## SOLUTION

With the desire for Vital Farms to accomplish all of their forecasting and budgeting needs under one platform, Anaplan was the selected technology solution to execute their FP&A processes and Demand Planning.

The FP&A solution leveraged the demand plan and statistical forecast in real-time to drive Revenue and COGS planning. Vital Farms can now generate a full FP&A budget that allows planners to manage their P&L, Balance Sheet, Cash Flows, Workforce, Capex, and OPEX through various methods, such as Zero Based Budgeting, Inputs, Allocations, etc.

Scenario planning and What- If capabilities are incorporated to understand the business/market impacts as they arise in a real time environment. KPI and Plan reconciliation guide the planning process by aligning budget to actuals and measuring forecast accuracy.



## RESULT

A connected plan between orders demand and FP&A models for Revenue & COGS purposes allows forecast orders to stay in sync and all be managed in one workspace. A simple but detailed allocation process allows planners to easily manage their P&L. Reporting and KPIs to reconcile budget to actuals provides detailed (and automated) reports not previously had by the organization. What- If and scenario planning easily allow the CFO to layer on high-level adjustments and see the downstream impacts to their financial statements.

The FP&A and Demand Planning models were built to scale and can easily grow, in which the organization has already started to expand into additional use cases within the Anaplan models.



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Accelytics leverages its Accelerated Approach methodology to help clients establish industry focused sustainable processes while using technology as a true enabler to the process.

Our experienced team delivers a broad range of services to help clients throughout their entire transnational journey. We provide solutions that include business process optimization, technology enablement and support services.

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