

Welcome and Purpose of Our Sessions

Presenter :
Alison Tonge



Reimagining planning for the NHS



Working Agenda for 12 th October 2022 (Virtual or in person at Anaplan UK, Regents Place, Floor 15, 338 Euston Rd, London NW1 3BT)		
Agenda item	Content	Time
Welcome and purpose of our session		11.15 to 11.30
Old world v new world planning	How do other complex industries do this- exemplars ? Why do we need a new approach ? What are the potential range of models ?	11:30 to 11:50
Ambulance service real world example South Central Ambulance Service	The Challenge The solution Work in progress/next steps	11:50 to 12:10
NHS real word example from Manchester University Hospital Trust	The Challenge The solution Work in progress/next steps	12:10 to 12:30
Bringing to life future NHS use cases	Demo Carousel <ul style="list-style-type: none"> • Workforce • Finance • Demand and Capacity • Facilitated Question and Answer session 	12:30 to 13:15
Collaboration for planning and engaging you	Centre for planning support Early adopter club	13:15 to 13:30

Speaker Introductions



Alison Tonge

Director of Integrated
Service Development
Arden & GEM



Neil Callow

SME Integrated
Planning Arden &
GEM



Tristan Colgate

Managing
Director, Fidenda



Steve West

Director of Planning and
Performance, South
Central Ambulance
Service NHS Trust



Edd Berry

Programme
Finance Director at
Manchester
University NHS FT



**Wouter van
Leeuwen**

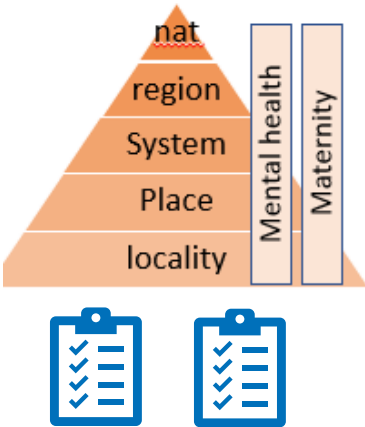
Principal consultant
and Regional
Director, Fidenda



Julian Di Tomaso

Enterprise Account
Manager Anaplan

Agile interdependency

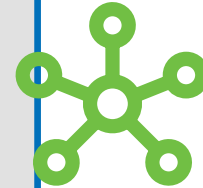


System delivery of transformation

- Decision making on priorities
- Transformation programs, initiatives and impact
- Accountability matrix
- Quality, value, capacity, performance and outcomes realisation management
- Social value delivery
- Connected leading and lagging measures

Organisation Resource Planning and Management

- NHS Trusts
- Mental health
- Community
- Primary care
- Independent sector
- Collaboratives/ion
- Workforce
- Finance
- Capacity and Demand
- Procurement and inventory
- Accountability measures, results and change programs



House keeping

- Please use the chat function to ask any questions or provide in put during the event
- Any colleagues joining the event that have not registered, please could you put your name and email address into the chat
- We will be hosting a Q&A session after our case study presentations during which we will answer key questions posted in the chat
- Colleagues will have received a link to a short survey. We ask that any colleagues who have not yet completed this survey please do so after the event. We will put a copy in the chat for you- **we would really value your input**
- Following the event, we will collate and respond to any questions not answered during the Q&A as well as report on the findings of our survey

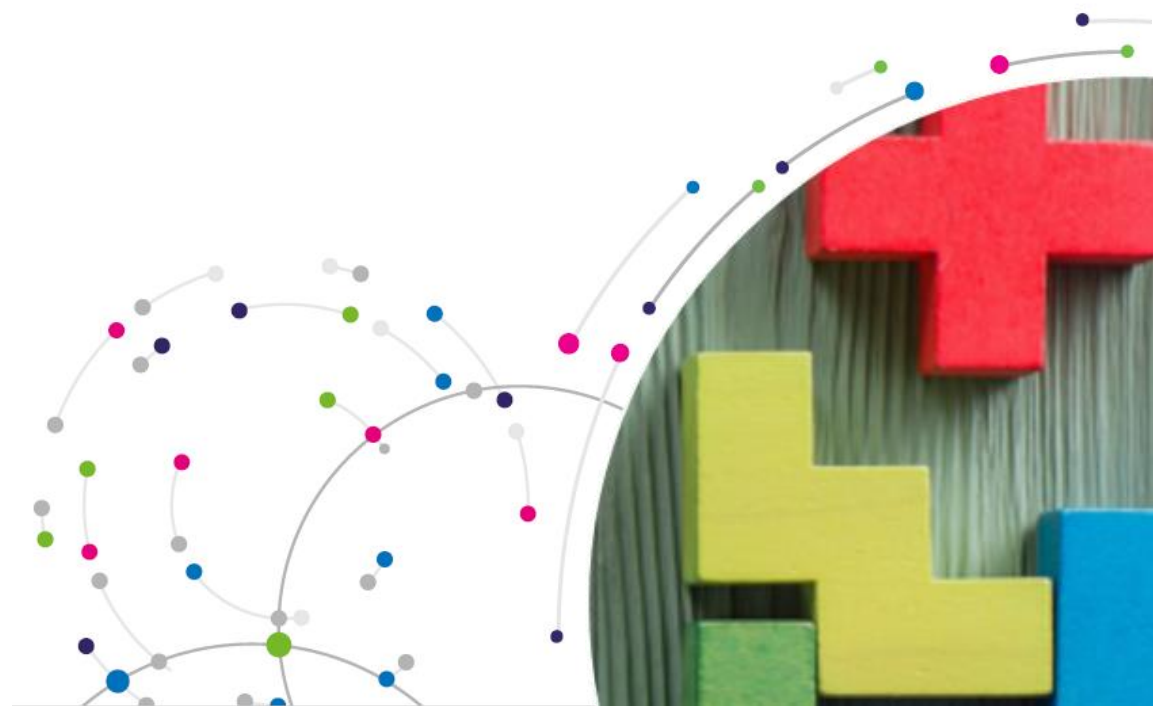


Old World V New World Planning

Presenters :

Neil Callow

Julian Di Tomaso



What is planning?



For something so important, do we really know:

- Why we're doing it?
- How we do it?
- Who needs to be involved?
- Are we using the right technology?
- How good are we at doing it?
- Is there a better way?



Old World vs New World



Old world



For the few

Siloed

Target driven

Subjective

Excel by default

Plan only

Static

Negative

New world



Collaborative

Connected

Decision driven

Optimised

Purpose built planning technology

Executable

Agile

Positive

Is there a better way?

Market trends

Gartner[®]

Real world success stories

Coca-Cola



NHS pioneers



NHS
South Central
Ambulance Service
NHS Foundation Trust

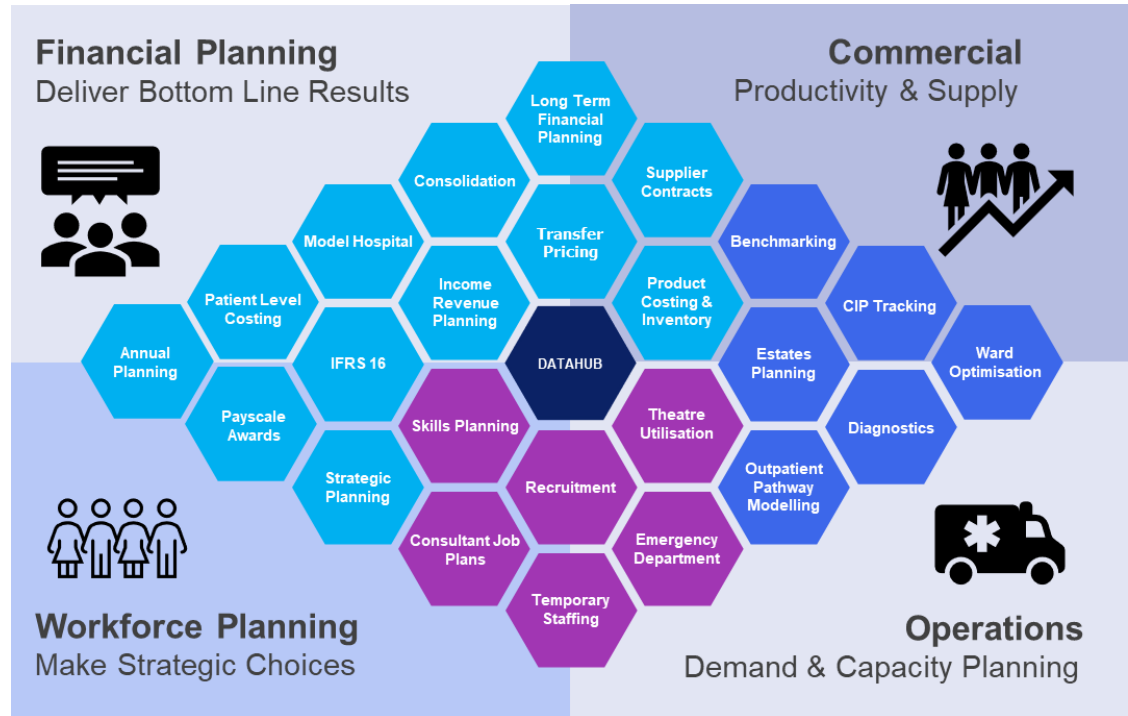
NHS
Manchester University
NHS Foundation Trust

NHS
Supply Chain

Customised solutions for the whole NHS

ICS	Provider Collaboratives	Acute Providers
Mental Health Providers	Community Providers	Ambulance Providers
Pathology Networks	Radiology Networks	Cancer Networks
Screening Services	Community Diagnostic Centres	Procurement Collaboratives
Collaborative Staff Banks		

Connected planning example for an acute provider



One Connected Planning Platform

Legacy planning systems



One planning platform



- Unified modeling, planning, analysis & reporting
- Breadth of financial and operational planning use cases
- Business self-service modeling
- Real-time responsiveness

“Anaplan has helped reduce our enterprise planning infrastructure costs by 50%” –VP of FP&A, \$11B company



Some of Our Clients



- Telecom
- Technology
- Banking
- Life Sciences
- Healthcare & Public Sector
- Insurance
- Retail

2000+ customers	57 countries with customers	175 partners	25% FY22 YOY total revenue growth
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Recognized as the Connected Planning / xP&A / DOP&A Pioneer *



<p>Gartner</p> <p>2021 CUSTOMER CHOICE</p> <p>Cloud Financial Planning and Analysis Solutions</p>	<p>Gartner</p> <p>2021 MARKET GUIDE</p> <p>Sales Performance Management</p>	<p>Gartner</p> <p>2021 NICHE</p> <p>Supply Chain Planning Solutions Magic Quadrant</p>	<p>Gartner</p> <p>LEADER 2020 2019 2018 2017</p> <p>Sales Performance Management Magic Quadrant</p>	<p>Gartner</p> <p>LEADER 2020 2019 2018 2017</p> <p>Cloud Financial Planning and Analysis Solutions Magic Quadrant</p>	<p>Gartner</p> <p>2020 CUSTOMER CHOICE</p> <p>Sales Performance Management</p>	<p>Gartner</p> <p>2019 LEADER</p> <p>Sales and Operations Planning Magic Quadrant</p>
<p>FORRESTER</p> <p>2021 NOW TECH REPORT</p> <p>Digital Operations Planning and Analytics</p>	<p>FORRESTER</p> <p>2020 NOW TECH REPORT</p> <p>Integrated Business Planning</p>	<p>FORRESTER</p> <p>2020 NOW TECH REPORT</p> <p>Account-based Marketing Solutions</p>	<p>FORRESTER</p> <p>2019 STRONG PERFORMER</p> <p>Forrester Wave: Sales Performance Management</p>	<p>IDC</p> <p>2020 LEADER</p> <p>MarketScape: Enterprise Performance Management</p>	<p>IDC</p> <p>2020 MAJOR PLAYER</p> <p>MarketScape: Worldwide Overall Supply Chain Planning</p>	<p>IDC</p> <p>2020 MAJOR PLAYER</p> <p>MarketScape: Worldwide Supply Chain Supply Planning</p>
<p>IDC</p> <p>2019 MAJOR PLAYER</p> <p>MarketScape: Worldwide Supply Chain Sales & Operations Planning</p>	<p>IDC</p> <p>2019 MAJOR PLAYER</p> <p>MarketScape: Worldwide Supply Chain Inventory Optimization</p>	<p>IDC</p> <p>2019 MAJOR PLAYER</p> <p>MarketScape: Worldwide Supply Chain Demand Planning</p>	<p>NUCLEUS RESEARCH</p> <p>2021 FACILITATOR</p> <p>SCP Technology Value Matrix</p>	<p>NUCLEUS RESEARCH</p> <p>2021 EXPERT</p> <p>CPM Technology Value Matrix</p>	<p>constellation RESEARCH</p> <p>2021 SHORTLIST™</p> <p>Cloud-Based Planning Platforms</p>	<p>VENTANA RESEARCH</p> <p>2020 VALUE INDEX LEADER</p> <p>Sales Performance Management</p>



Power of Anaplan Platform: Benchmarks



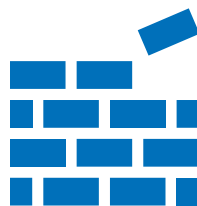
Anaplan platform has the computing power capable of processing over

321
trillion

operations per second

Patented Hyperblock®

Optimized to process blocks rather than cells, allowing large scale changes to happen very fast



On a specific day in last 6 months, more than

161
trillion cells

were updated; the platform frequently sees transactions that update more than

01111000001
01010101011
10100001100
01010000010
10001000010

20
billion cells

each time



Zero

Downtime Releases (CI/CD)



DevOps Culture



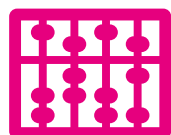
511

releases



244

new or improved feature



The largest single model on the platform has

104
billion cells

**22,239,589,977,
129,368**

Cells recalculated in the last 6 months (22 quadrillion)



Ambulance Service Real World Example – South Central Ambulance Service

Presenter :
Steve West



South Central Ambulance
Service Foundation Trust

Resource Optimisation Project

Integrated Demand & Capacity Planning

Steve West, Director of Planning & Performance Forecasting, SCAS





NHS

South Central
Ambulance Service

NHS Foundation Trust

The Start of our Journey



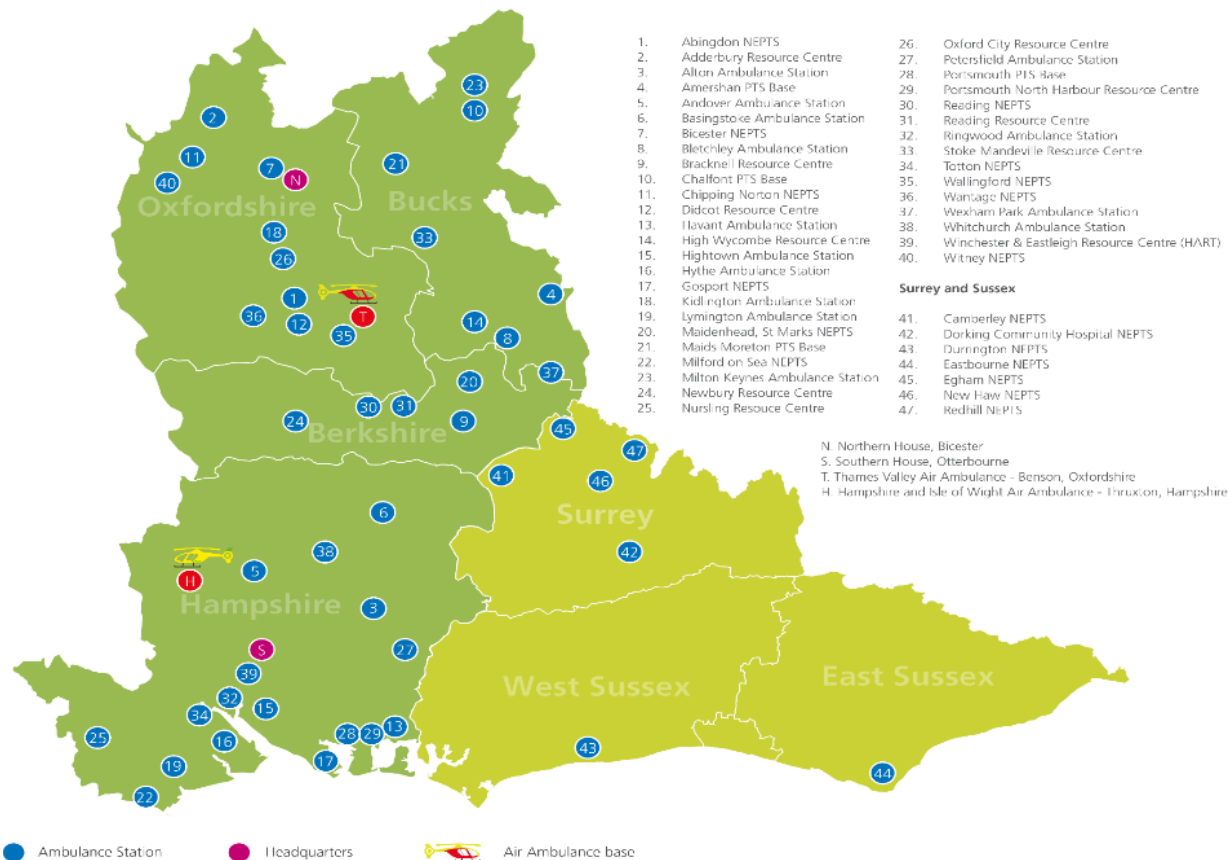


NHS

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Ambulance Service

NHS Foundation Trust

About Us





NHS

**South Central
Ambulance Service**

NHS Foundation Trust

South Central Ambulance Service (SCAS)

999 111 PTS

24/7

24

Ambulance Response Programme



Integrated Urgent Care



567,217
emergency
999 incidents
attended



873,922
PTS journeys



1,200,000+
calls to NHS 111



3,300 staff



1,000 volunteers



25
governors



868
vehicles



13,957
public members



100+ sites



CQC rated 'Good'



15.26% cardiac
arrest survival to
discharge from hospital



'Best in England'

£215.6m
income





NHS

**South Central
Ambulance Service**

NHS Foundation Trust

Our Challenge

What does the patient need?

The right vehicle



The right skill

The right time, within time , every time



3500 square miles



500,000 incidents



24/7



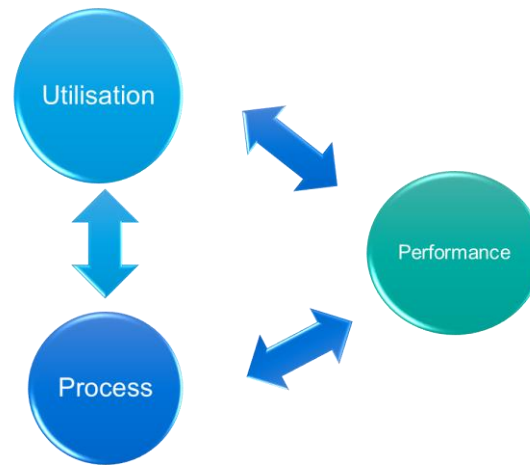
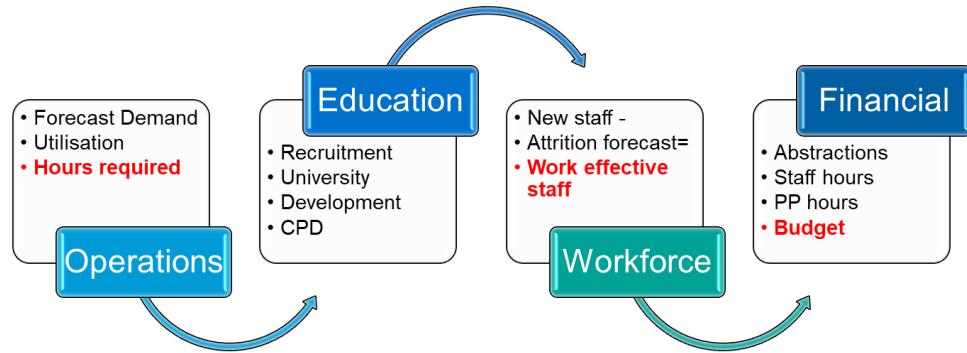
7 minutes from call
to on scene



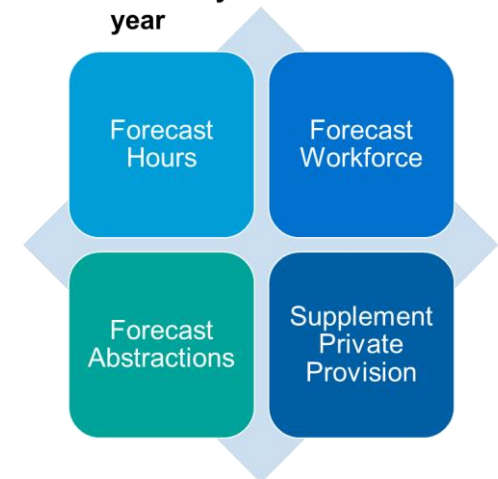
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Integrated Planning Approach



For every week of the year





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The Problem



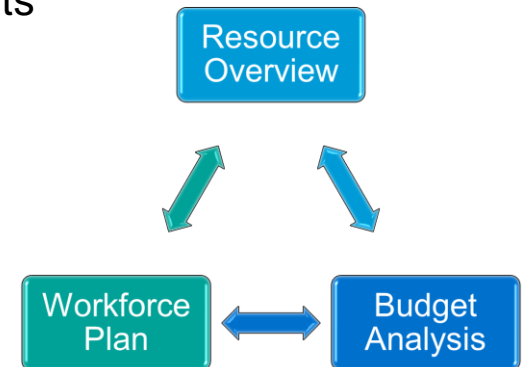
Current process is Exemplar



Reliant on numerous spreadsheets



Reliant on legacy databases





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NHS Foundation Trust

The Idea



Implement a Single Resource Optimisation Solution



Integrate Resource – 999, CCC and PTS



Improve efficiency & effectiveness of planning processes



Connect our Data, our People and our Plans



Optimise our current processes



Build Resilience





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The Involvement

The Programme, Stakeholders,

Consultants & Project Team



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NHS
England



FIDeNDa

Anaplan



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Ambulance Service

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The Methodology





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SCAS Data

CAD

*job & incident
details*

GRS

SCAS Rostering

Skillstream

*Private
Provider,
Agency & Bank
Rostering*

ESR

*Staff Personnel
records*

**Dynamics
Ledger**

*Payroll &
Expenditure*

DATA WAREHOUSE

API Connector

OPS
Frontline
Budget
Forecast

CCC
Budget
Forecast

Workforce
Plan

DATA
HUB

Financial
Resource
Analysis

Plan IQ

Statistical
Model

Anaplan Model



NHS

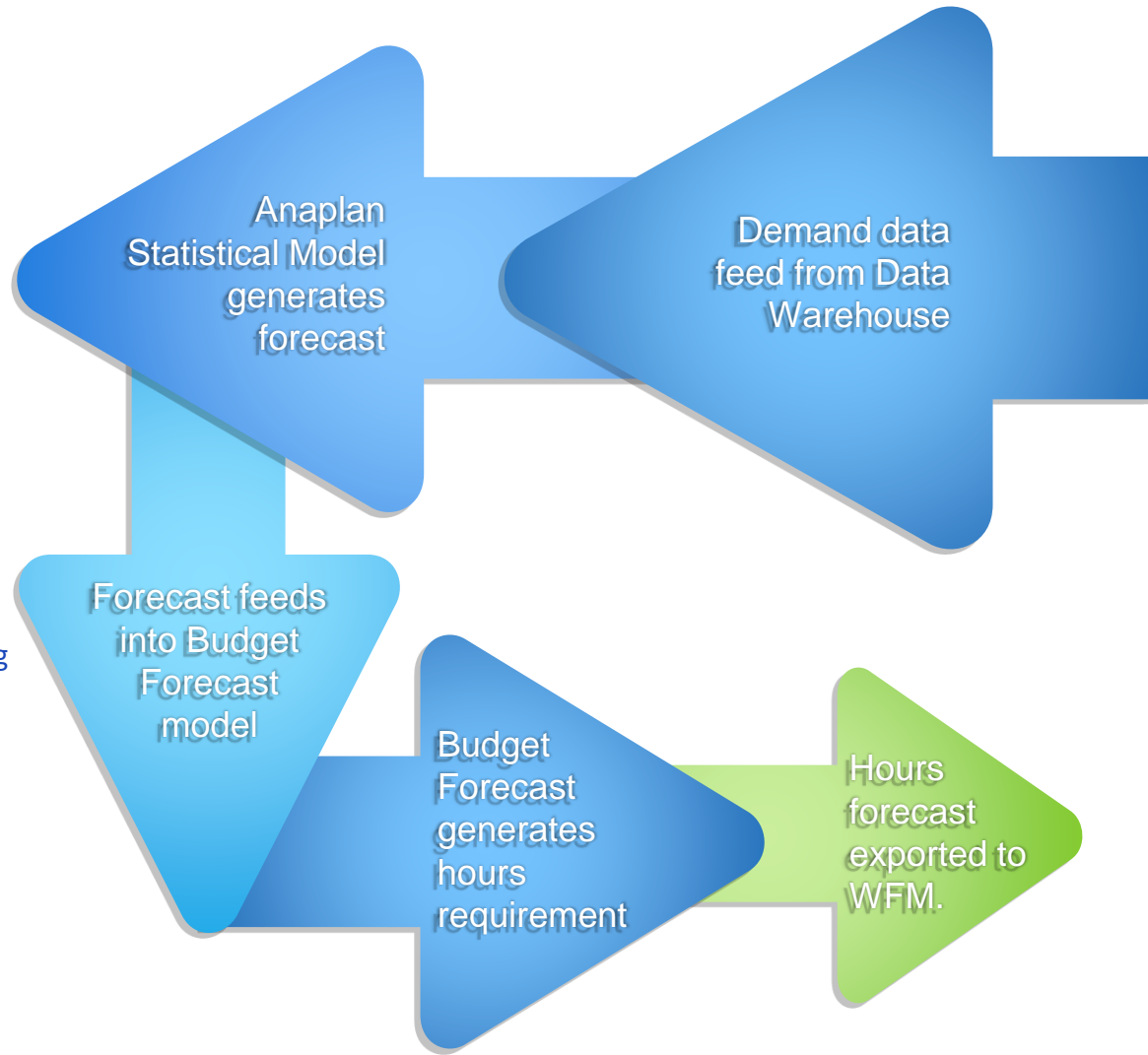
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The Forecasting Process SO WHAT

Automated Patient Led Demand & Capacity Planning
Process

Generates Staffing Requirement

Exports to Workforce Management System





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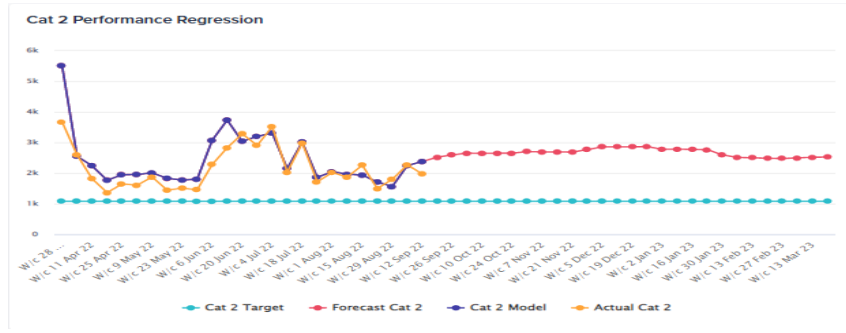
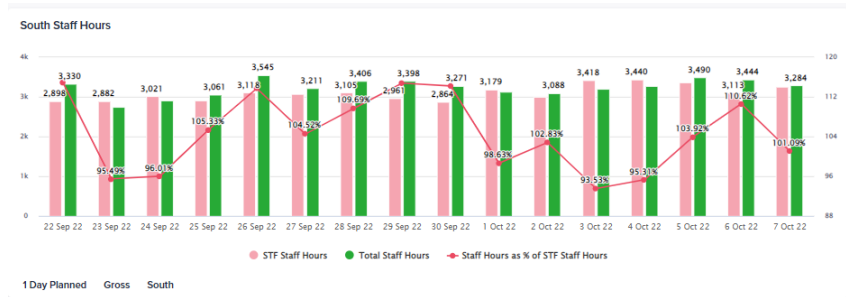
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Performance Prediction



Multivariate regression model enable future performance risks to be identified and actions taken to mitigate





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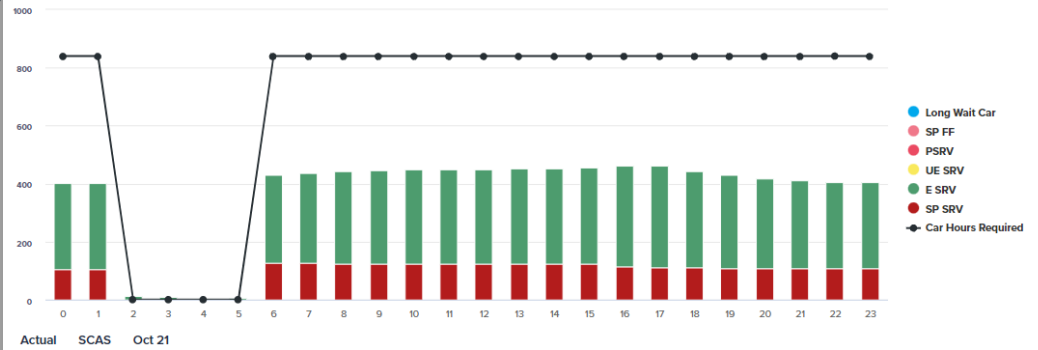
NHS Foundation Trust

Daily Resource & Vehicle Models

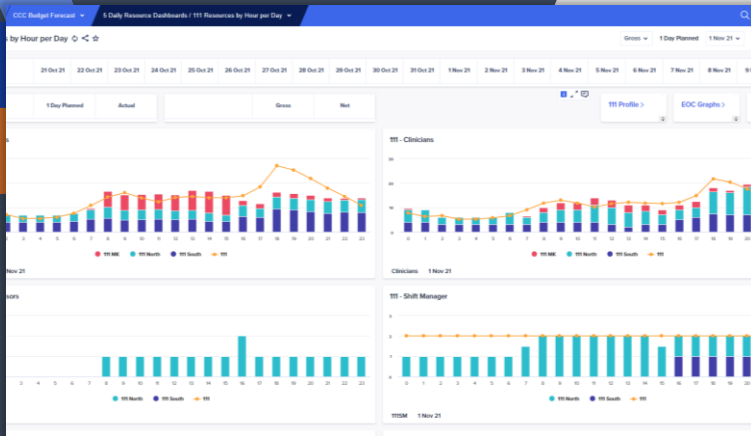
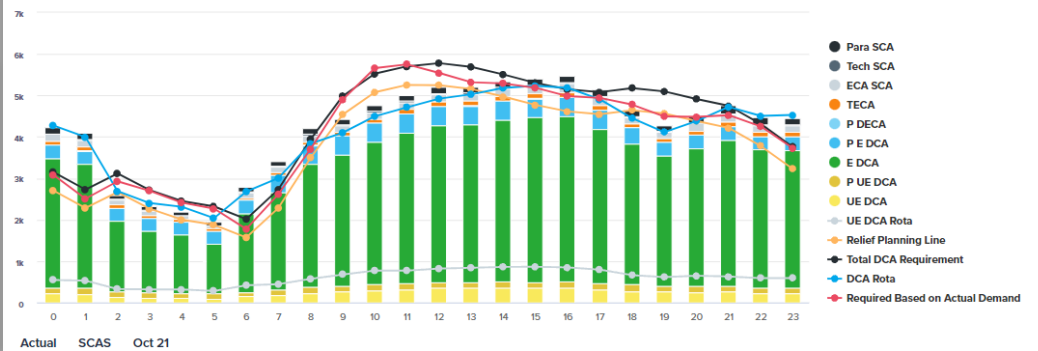
Ops Frontline & Clinical Call Centre



Daily Response Car Resourcing



Daily Transport Vehicle Resourcing



Refreshing at 15-minute intervals



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The Success of our Journey





Automated Integrated Planning of 999, 111 & EOC

Improved forecasting accuracy and timeliness of reporting

Improved planning processes reducing need for private ambulance providers saving £1m+

Aligns current & future workforce plans with patient demand, operational plans & strategic goals

Reduce risk associated with talent shortages and sourcing of highly skilled and technical personnel

Benefits





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Machine Learning Models

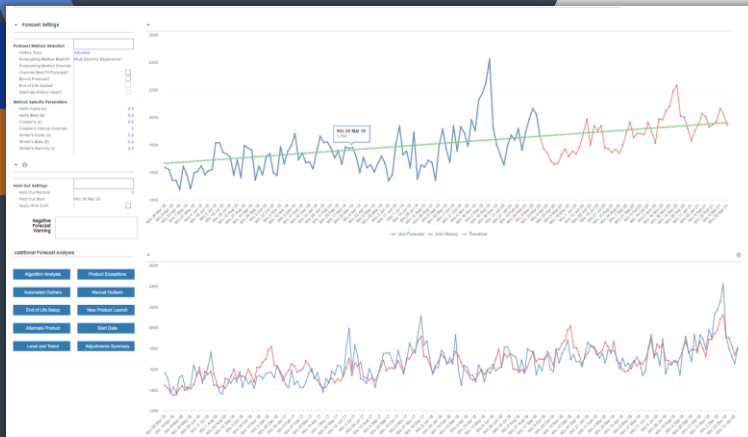


When looking at the forecasts, it is evident that the ML model has improved the MAPE by 1.7% compared to SCAS legacy Short Term Forecast.

Responses

	Absolute % Error	MAPE	RMSE
Plan IQ	0.3298	4.578	13.01
SCAS STF	1.224	6.398	18.35

SCAS Model



Key Benefits

- Improved accuracy by leveraging new and existing data
- Amazon Forecast enables advanced forecast algorithms
- ML algorithms can run more scenarios, and find correlations and trends that wouldn't otherwise be found.



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External Adoption

SCAS Connected Planning Model



NHS

Portsmouth Hospitals
University

NHS Trust





Manchester University
NHS Foundation Trust

Planning & Budget Setting Transformation

Edd Berry
Director of Finance Innovation

Manchester University NHS
Foundation Trust



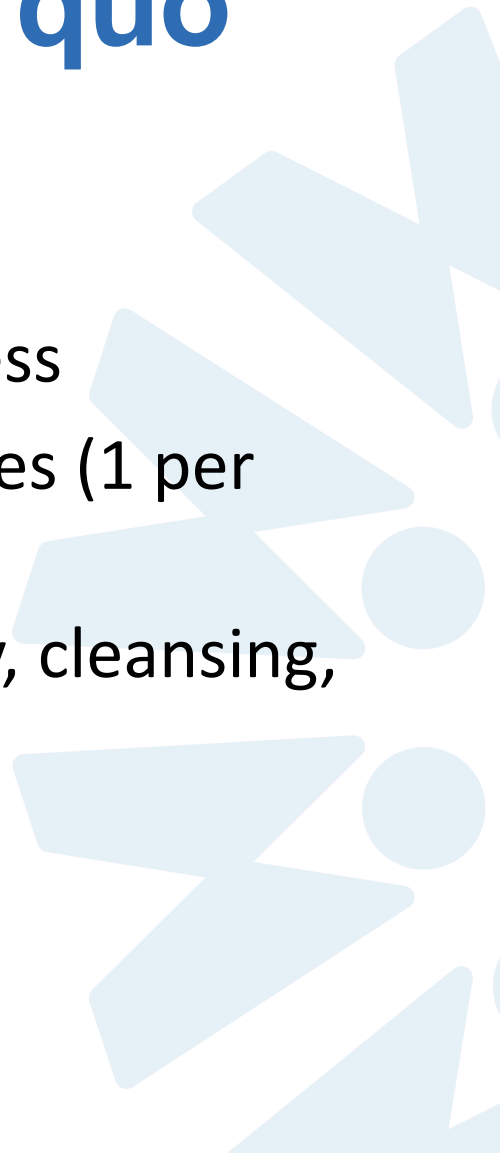
The Challenge - Background

- Group of 10 Hospitals / Managed Clinical Services each with their own DoF and Management Accounts Team
- £2.5bn turnover and 30,000 staff
- All planning / budgeting supported via spreadsheets
- Size of trust has resulted in granular detail being too large for a single consolidated spreadsheet
- Annual Plan timetable / assumptions not within our gift
- Local budget setting may run in tandem with uncertainty around assumptions – pay awards, income etc
- Significant cost saving / waste reduction targets not confirmed until the end of the process
- Coincides with the NHS's busiest period (Winter) and efforts to meet the current year's budget / CIPs

Pre-Anaplan Pay Process

- Pay award calculation for all 30,000 staff. All in spreadsheets:
 - Reviewing the establishment
 - Reviewing the actuals / Staff in Post
 - Updating the payscales (+1300 pay points)
 - Significant staff not on MFT payroll – Junior Doctors
 - Adjusting for tax/NI changes
 - Calculating incremental drift
- Reconciliation of current year's budget and recurrent budget
- Ongoing negotiations externally and internally around investments/pressures – continuously moving picture

Not sustainable status quo

- Highly transactional
 - Multiple spreadsheets
 - Single points of failure throughout process
 - 10 different budget setting methodologies (1 per hospital)
 - Thousands of hours tied up in data entry, cleansing, analysis, duplication and reporting
- 
- The right side of the slide features a decorative background of light blue, semi-transparent geometric shapes, including triangles, circles, and irregular polygons, arranged in a pattern that suggests movement or data flow.

Introducing: Anaplan

- November 2021 – Contract signed Friday, 14 workshops the following week with Anaplan partner Fidenda
- Identified & designed two models:
 - Pay Award Model
 - Annual Plan Model
- Intense period of development and collaboration throughout November and December
- Roll out of live Pay Award Model in January 2022 to 160 finance staff
- Fed by “Staff in Post” from our Electronic Staff Record (ESR) able to calculate our most accurate pay budget ever in a fraction of the excel based time



MFT Staff Cost Planning



[Admin Hub >](#)

Manage the payroll data uploads, central assumptions & mapping tables

[Staff Planning >](#)

Manage staff budget at employee level

[Scenarios >](#)

Model staff cost scenarios

[Monthly Reporting](#)

Review monthly staff cost actuals vs budget



Staff Planning Home Page

[01 Staff Planning - All Employees Excl Junior Doctors >](#)
Build staff budget for all employees excluding Junior Doctors

[02 Staff Planning - Junior Doctors >](#)
Build staff budget for all Junior Doctors

[05 Staff Planning - Employee Moves >](#)
Input & process movements of employees from one cost centre to another

[03 Staff Planning - Budget Transfers >](#)
Review and manage budget transfers

[Staff Planning - Summary >](#)
Review final staff budget by GL Account

[Budget Setting Acceptance Document](#)
Sign off form for staff budget

01 Staff Planning - All Employees Excl Junior Doctors

L6 - [dropdown] | AUG Virements ▾ | Reset

Surname	Establishment	Not Yet Re...
Lynne Truss	Establishment	Not Yet Re...
Jeremy Corbyn	Establishment	Not Yet Re...
Keir Starmer	Establishment	Not Yet Re...
Priti Patel	Establishment	Not Yet Re...
Donald Duck	Establishment	Not Yet Re...

Basic Annual Salary (Medics/ Non-Medics)

Surname	Pay Scale @ fin year start	Use Pay Scale Override?	Pay Scale Override	Pay Scale	Increment Date SIP	Use Increment Date Override?	Increment Date Override	Increment Date	Basic Annual Salary Inc Increment
Therese Coffey	XN0702	<input checked="" type="checkbox"/>	XN0801	XN0801	11/1/22	<input type="checkbox"/>		11/1/22	23,563
Joseph Stalin	XN0702	<input checked="" type="checkbox"/>	XN0804	XN0804	11/1/22	<input type="checkbox"/>		11/1/22	24,386
Boris Johnson	XN0301	<input type="checkbox"/>		XN0301	10/1/1/22	<input type="checkbox"/>		10/1/1/22	15,248
Lynne Truss	XN0307	<input type="checkbox"/>		XN0307	10/1/08	<input type="checkbox"/>		10/1/08	21,777
Jeremy Corbyn	XN0304	<input type="checkbox"/>		XN0304	10/23/22	<input type="checkbox"/>		10/23/22	21,777
Keir Starmer	XN0302	<input type="checkbox"/>		XN0302	11/2/22	<input type="checkbox"/>		11/2/22	20,933
Priti Patel	XN0301	<input type="checkbox"/>		XN0301	10/4/22	<input type="checkbox"/>		10/4/22	20,330
Donald Duck	XN0304	<input type="checkbox"/>		XN0304	4/1/22	<input type="checkbox"/>		4/1/22	21,777
Simon Stevens	XN0402	<input type="checkbox"/>		XN0402	10/19/22	<input type="checkbox"/>		10/19/22	22,549
Margaret Thatcher	XN0806	<input checked="" type="checkbox"/>	LC0102	LC0102	7/7/20	<input type="checkbox"/>		7/7/20	84,024

Rapid Development

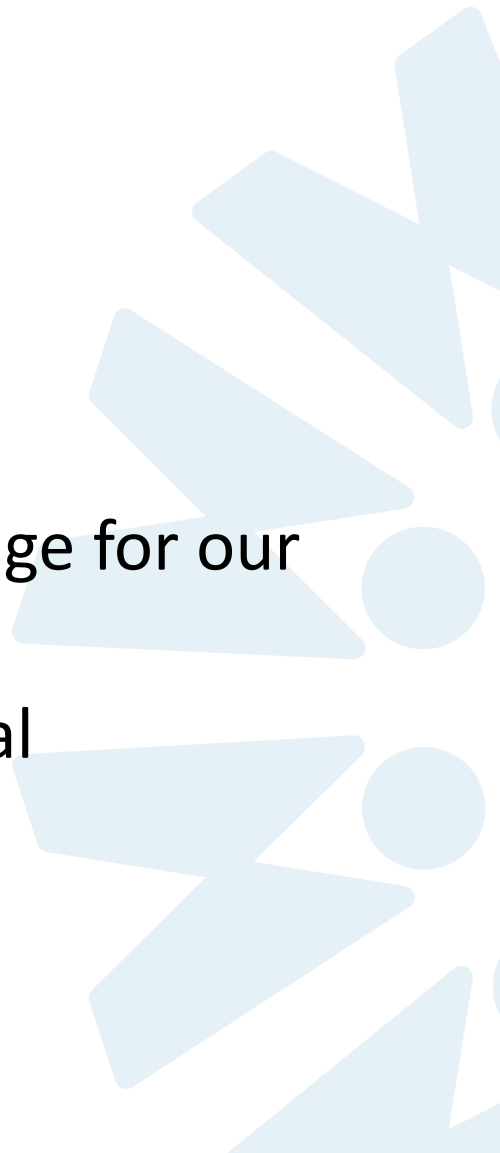
- Organisational annual financial plan is set in stone, budgets are not...
- Typical month sees 1,500 to 2,000 budget changes
- Switched off the ability to do budget changes in our ledger and channelled all changes through Anaplan
- Changes that previously took 15mins can now be done in seconds

Next Steps

- Enhancing the full Annual Plan I&E model to eradicate spreadsheets for 23/24
- Consolidate learning and upskilling of staff / training
- Centre of Excellence for Anaplan within MFT
- Future models:
 - Forecasting with AI/ML
 - Capital planning
 - Balance Sheet & Cashflow modelling
 - CIP Model



Our learning

- Wouldn't have succeeded without an implementation partner
 - Slow down!
 - Testing, testing, testing
 - Significant cultural and upskilling challenge for our workforce
 - Governance and transparency is essential
- 
- A decorative graphic on the right side of the slide, featuring several stylized human figures in light blue. The figures are composed of simple geometric shapes like triangles and circles, arranged in a cluster that suggests a group of people or a community.

Bringing to life future NHS use cases and questions for the panel

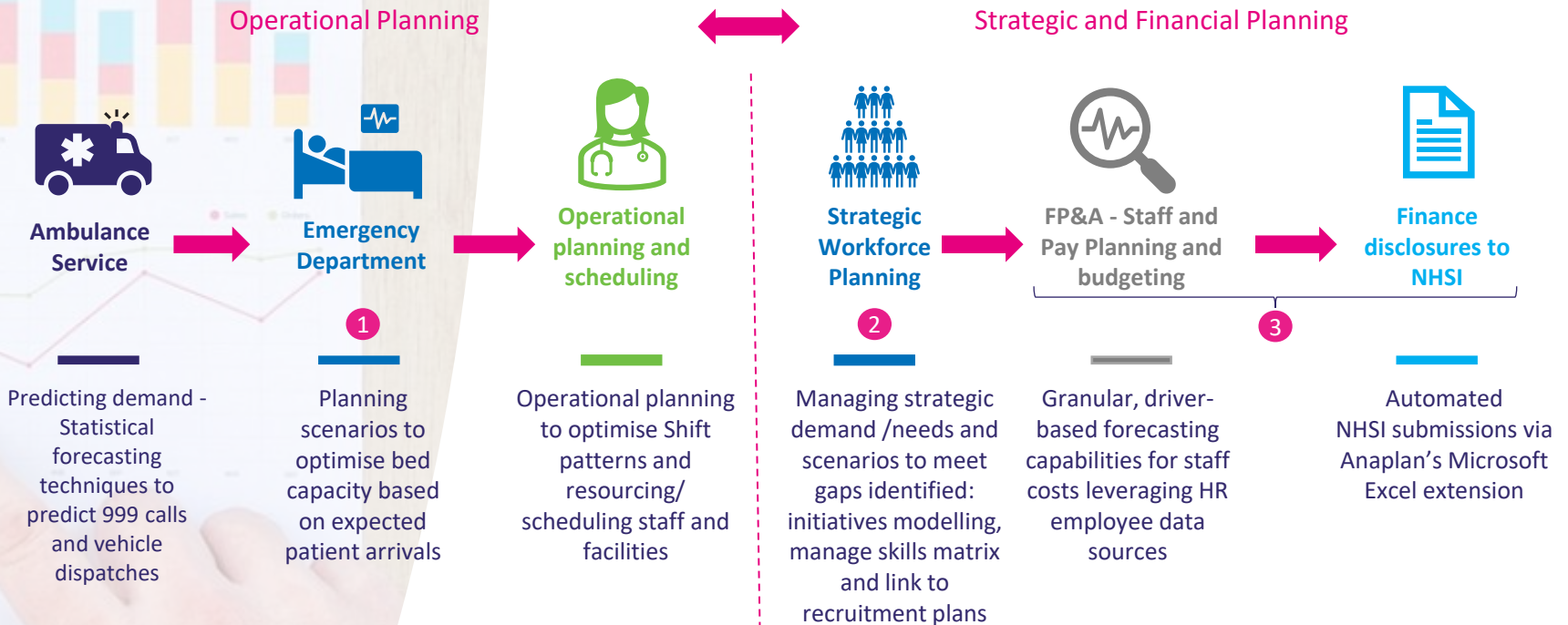
Presenters :

Tristan Colgate

Alison Tonge

Bringing to life future NHS use cases

Today's Demo Carousel will bring 'Connected Planning' to life for the NHS



X Demo

1 NHS use case #1: ED Demand and Bed Capacity



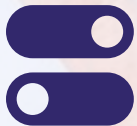
5 minute demo **Emergency Department Bed Capacity Management**



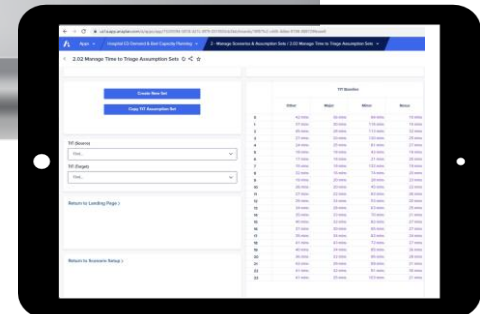
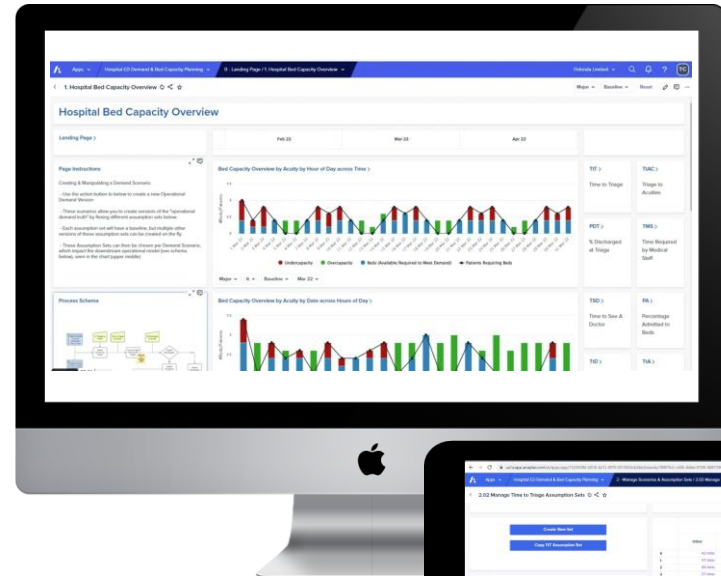
Matching demand and capacity based on granular real-time operational data by acuity by hour of day



Exception-based visualization and reporting capabilities



Assumption sets that drive calculations and allow for operational scenario planning



2 NHS use case #2: Strategic Workforce Planning



8 minute demo

Uncover workforce gaps. Understand the cost and business impact of your decisions about how to close the gaps



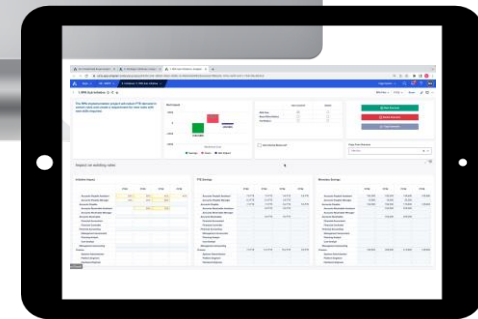
Provide complete transparency into your headcount and costs



Perform "what-if" scenario planning analyses to assess the impact of changes. Pivot workforce plans quickly and effectively.



Provide early guidance for recruitment and closing skills gaps



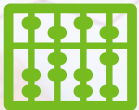
3 NHS use case #3: FP&A Annual Planning and forecasting



7 minute demo **Managing the Annual Budget & NHSI submissions through improved budget setting process**



Automated NHSI submissions via Anaplan's Microsoft Excel extension



Granular, driver-based forecasting capabilities for staff costs leveraging HR employee data sources



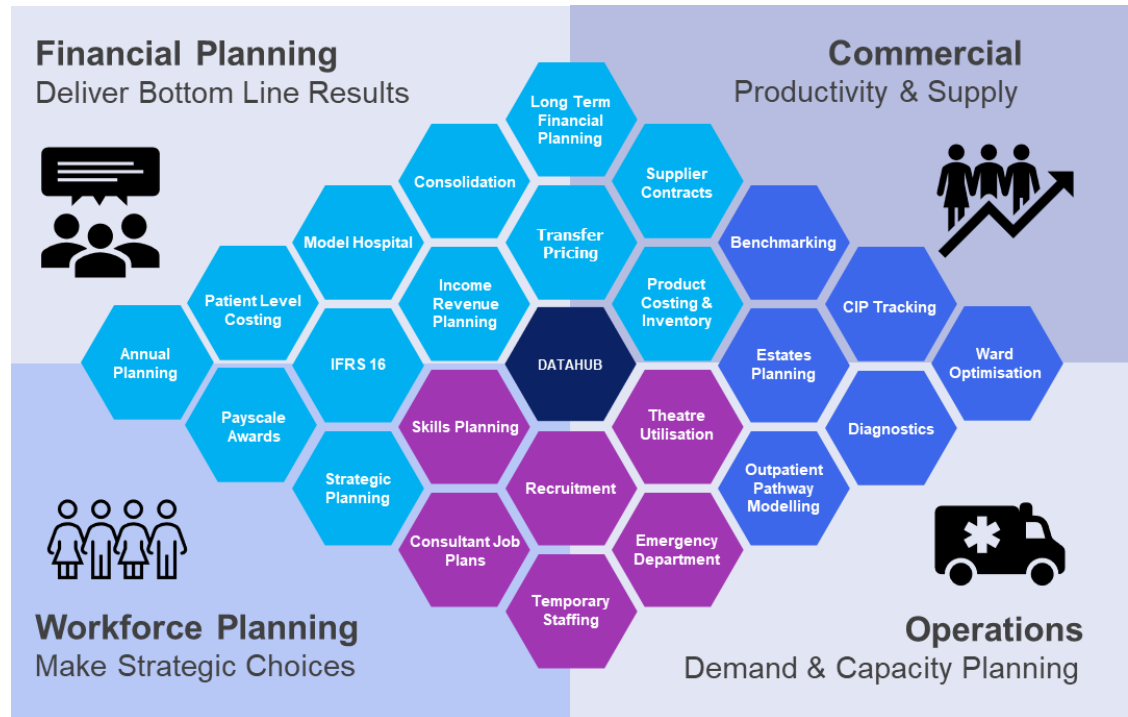
Establish trust by increased auditability and accuracy



Customised solutions for the whole NHS

ICS	Provider Collaboratives	Acute Providers
Mental Health Providers	Community Providers	Ambulance Providers
Pathology Networks	Radiology Networks	Cancer Networks
Screening Services	Community Diagnostic Centres	Procurement Collaboratives
Collaborative Staff Banks		

Connected planning example for an acute provider



We are keen to hear your questions on the sessions




Questions



Thoughts



Ideas



Any other
feedback...

Collaboration for planning and engaging you

Presenter :
Alison Tonge



How AGEM is taking this forward

1 Evaluate



Evaluate and prioritise solution areas based on your feedback and engagement

2 Deep-Dive workshops



Conduct focused solution workshops with interactive live demo's and more time for discovery

Expression of interest

3 Prioritise requirements



Establishing a prioritised set of requirements that articulate the business value that Anaplan can bring

4 Build Proof of Concept



For the selected use cases, establish a working Proof of Concept across a range of ICBs and Providers

Expression of interest

5 NHS Roadshow

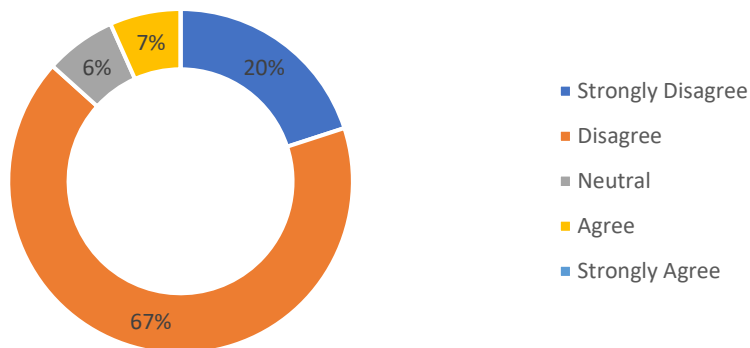


Share solution POC, lessons learnt and implementation proposals across interested NHS organisations and secure funding

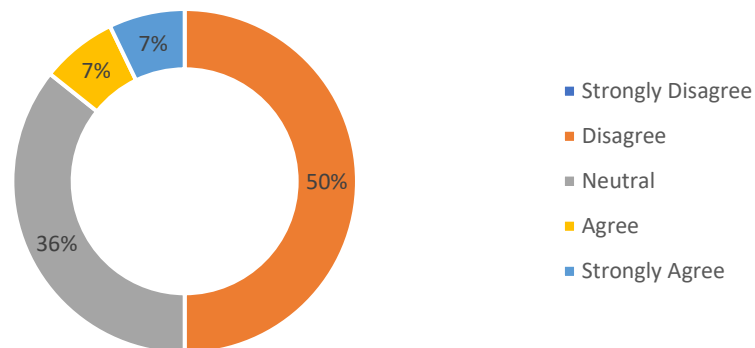
Emerging results of the NHS planning survey ...



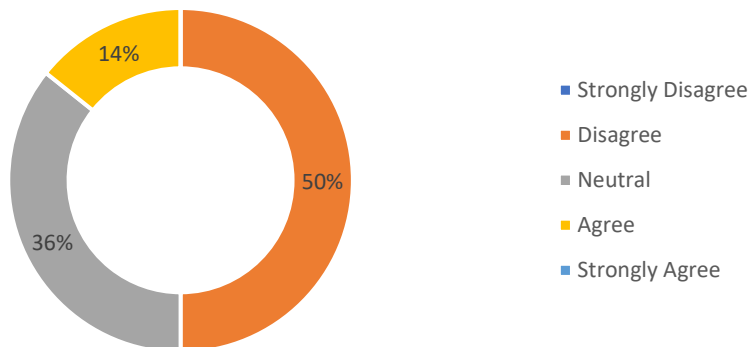
Current planning processes in the NHS are well integrated and not siloed.



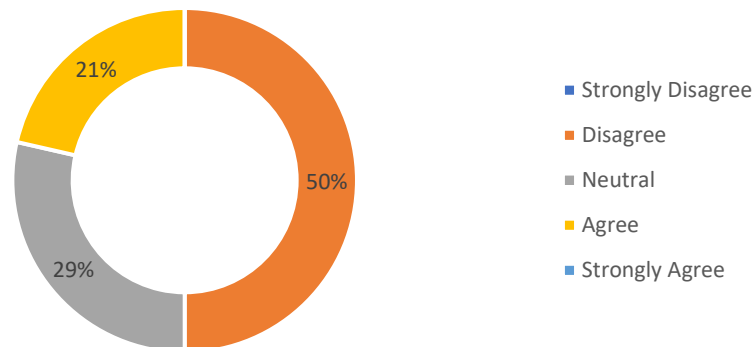
I have positive experiences with current planning processes in the NHS.



Planning processes within the NHS are collaborative.



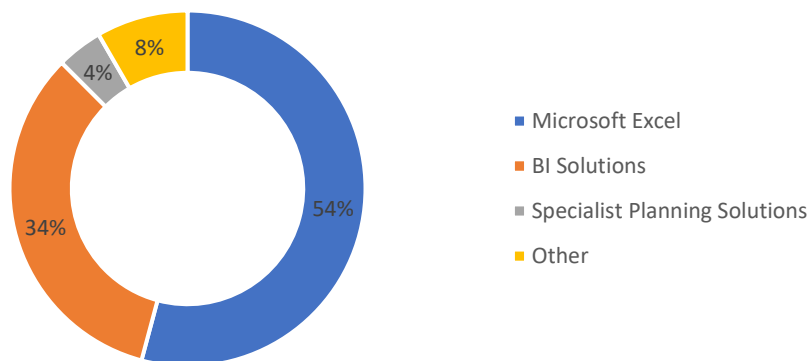
There is high focus on clear shared goals with regards to current planning processes.



Emerging results of the NHS planning survey ...

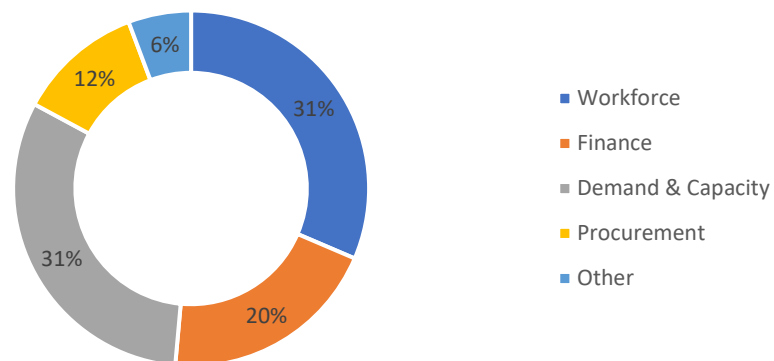


What technologies do you use for your planning processes?



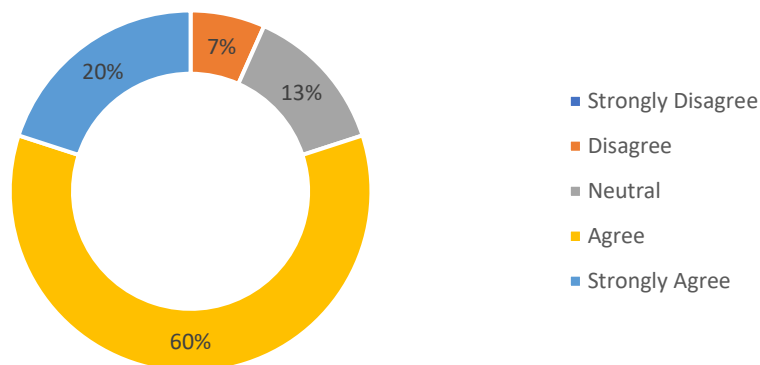
Other processes mentioned included STAR for resource allocation, quality improvement approaches, Lean and NLP high performing teams

Which of the following specialist planning solutions do you feel should be prioritised for development?

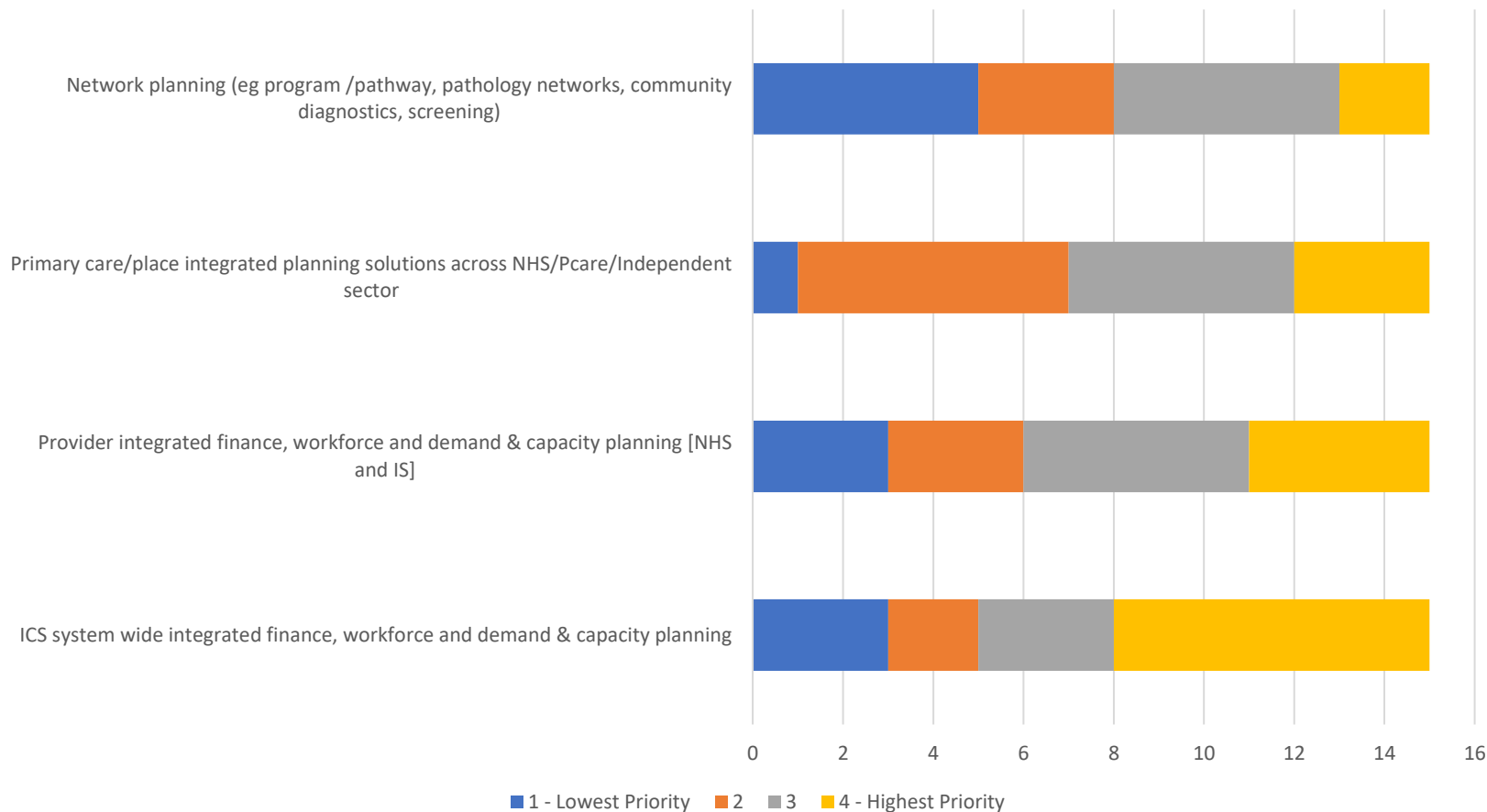


Other solutions mentioned ways of incorporating data beyond of acute settings, impact of changed pathways as well as the triangulation of workforce, finance and activity

On a scale of 1-5, is improvement of planning and decision-making processes a priority in your organisation?



Emerging results of the NHS planning survey ...



Thank you for your time

Please feel free to contact Alison Tonge [alison.tonge1@nhs.net] if you are interested in taking part in a workshop in your organisation or system, so that we can develop this opportunity further.



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