NEGOTIATION PREP BRIEFING | ANAPLAN CONNECTED PLANNING, WORKSPACE PRICING, AND PE OWNERSHIP

Anaplan Renewal: Talking Points, Call Scripts, and Negotiation Prep

A three call playbook for sourcing teams: word for word scripts for the first, second, and third call, the mechanics behind Anaplan's side of the table post-Thoma Bravo, and prompts to customize every line | 27 August 2026

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READ THIS BEFORE YOU DIAL

Thoma Bravo acquired Anaplan in June 2022 for $10.7 billion, and the commercial consequences have followed the same trajectory as every Thoma Bravo acquisition in this series. Annual Anaplan uplifts have increased, net revenue retention is the primary Anaplan account team metric, and the Anaplan module and workspace expansion narrative has intensified as the growth vehicle for the existing customer base. Organizations that have not run a formal Anaplan competitive evaluation or challenged their Anaplan uplift since the 2022 acquisition are absorbing a PE-driven repricing they were never asked to accept.

The second structural fact: Anaplan's workspace-based pricing model accumulates cost through development, testing, and sandbox workspaces that most Anaplan estates carry alongside production workspaces. Every Anaplan workspace — production, development, UAT, sandbox — is typically included in the Anaplan contracted workspace count. A workspace audit almost always reveals that the number of active production Anaplan workspaces is materially lower than the total contracted workspace count. The Anaplan workspace reduction, combined with a competitive evaluation against OneStream and Pigment for the FP&A and connected planning workload, is the two-lever approach that disciplines the Anaplan renewal systematically. Three structured calls are how.

1. THE 2026 ANAPLAN REALITY: FOUR SHIFTS THAT CHANGE YOUR ANAPLAN SCRIPT

- **Thoma Bravo ownership means the Anaplan uplift is the first commercial challenge.** Thoma Bravo's Anaplan acquisition requires demonstrable price realization from Anaplan's existing customer base. Annual Anaplan uplifts of 6 to 9 percent are now standard post-acquisition, and the Anaplan account team has limited discretion to waive them without escalation to VP level. That escalation is achievable with OneStream or Pigment on record as formally evaluated Anaplan alternatives. The Anaplan uplift is the first thing to name and the first thing to challenge on the opening Anaplan call.
- **Anaplan workspace proliferation is the most consistent source of Anaplan overpayment.** Anaplan workspaces are the unit of Anaplan platform organization — each Anaplan workspace contains Anaplan models, Anaplan data imports, and Anaplan dashboards. Organizations that deploy Anaplan across FP&A, supply chain, and sales planning typically have production workspaces for each planning domain alongside development, test, and sandbox workspaces for each. The Anaplan workspace count in most enterprise estates is two to three times the number of active production Anaplan planning use cases. Anaplan contracts at the workspace count; the workspace audit is the tool that exposes the discrepancy.
- **OneStream is the most commercially credible Anaplan alternative in the enterprise EPM market.** OneStream Software provides a unified financial close, consolidation, and planning platform that directly competes with Anaplan for the FP&A and financial planning use case. OneStream has displaced Anaplan at major enterprise accounts and Anaplan account teams are trained to respond to OneStream specifically. A formal OneStream evaluation in progress before the Anaplan renewal is the competitive signal that most directly escalates the Anaplan pricing conversation. Pigment is the fast-growing SaaS challenger for the operational planning and FP&A workload, particularly in organizations seeking Anaplan simplicity without Anaplan complexity and Anaplan pricing.
- **Anaplan full-access users versus connect users is a frequently misallocated cost.** Anaplan prices Full Access Users (who can build and modify Anaplan models and dashboards) separately from Connect Users (read-only access for dashboard consumption). In most Anaplan enterprise deployments, a significant share of the Anaplan Full Access User count is held by business users who use Anaplan only to view dashboards, run pre-built scenarios, and export Anaplan reports rather than to build Anaplan models. Downgrading those Anaplan users from Full Access to Connect tier is a direct Anaplan cost reduction that does not require any Anaplan platform change.

2. BEFORE ANAPLAN CALL 1: WHAT YOU ASSEMBLE

- **Their calendar.** Anaplan aligns its fiscal year to January 31 under Thoma Bravo ownership, though as a private company this is not publicly confirmed; confirm the applicable Anaplan fiscal quarter and close date with your account team in Call 1. Target January for maximum Anaplan pricing authority and discount depth based on Anaplan's historical sales patterns.
- **The Anaplan workspace audit.** Every Anaplan workspace in your Anaplan tenant: workspace name, primary use case (production planning, development, testing, sandbox), active Anaplan model count, active user count in the past 90 days, and last modification date. Workspaces with fewer than five active users in the past 90 days and no modifications in the past 30 days are candidates for consolidation or deletion before the Anaplan renewal is priced. The active production workspace count versus the total contracted Anaplan workspace count is the reduction argument.

- **The Anaplan user tier audit.** Every Full Access Anaplan User: their primary Anaplan activity in the past 90 days (model building versus dashboard viewing versus report running). Full Access Anaplan Users whose activity is limited to viewing pre-built Anaplan dashboards and running pre-built Anaplan scenarios are Connect User candidates. The per-user cost delta between Anaplan Full Access and Anaplan Connect is significant; the downgrade is a direct Anaplan cost reduction before the renewal is built.
- **The Anaplan uplift history.** The Anaplan annual uplift applied in each year of the current Anaplan agreement. Under Thoma Bravo ownership, the Anaplan uplift trajectory is the number that contextualizes the PE acquisition commercially. This history is the basis for the uplift challenge in Call 1.
- **The competitive file.** OneStream pricing for your FP&A and financial planning use case. Pigment pricing for your operational planning scope. Workday Adaptive Insights for organizations already running Workday HCM or Workday Financials. IBM Planning Analytics (TM1) for regulated industries or organizations with complex OLAP requirements. A real Anaplan alternative with real pricing changes what the Anaplan account team takes to the desk.
- **One voice.** Route everything commercial through sourcing. FP&A teams and COE leaders that have built their planning models on Anaplan are deeply embedded and resistant to re-evaluation, and Anaplan account teams maintain direct relationships with CFOs and FP&A VPs. Every side conversation confirming Anaplan platform irreplaceability removes Anaplan negotiating leverage.

CALL 1: THE ANAPLAN FRAMING CALL

T MINUS 9 TO 6 MONTHS

Goal: *establish the Anaplan renewal as a competitive event, name the Thoma Bravo acquisition as commercial context, put the Anaplan workspace audit and user tier audit on record, name OneStream and Pigment as formal evaluations, and signal that the Anaplan uplift is the first commercial challenge. You are not negotiating on this Anaplan call; you are setting the conditions every later Anaplan number lives inside.*

OPEN WITH THIS

"Thanks for making time. We are starting this Anaplan renewal early because we run it as a formal sourcing event alongside an evaluation of OneStream for our financial planning workload and Pigment for our operational planning scope. All commercial communication routes through me. We are contextualizing this Anaplan renewal against the Thoma Bravo acquisition and the commercial changes that have followed. Today I need three things from Anaplan: every workspace in our Anaplan tenant quoted at its active use case with active user evidence, the annual Anaplan uplift disclosed before the proposal is built, and the per-workspace and per-user rate at our active counts confirmed in writing."

Ask these five Anaplan questions, in this order

1. "Can Anaplan provide the active user count by workspace and by user tier for the past 90 days from your Anaplan platform telemetry?"
2. "What is the per-workspace Anaplan rate at our active production workspace count, and what is the per-user rate for Anaplan Full Access versus Anaplan Connect users at our active user counts?"
3. "What annual Anaplan uplift is Thoma Bravo embedding in this Anaplan renewal proposal, and what is the contractual basis for that Anaplan uplift rate?"
4. "Which Anaplan workspaces in our tenant have fewer than five active users in the past 90 days, and what is the per-workspace rate for a reduced Anaplan workspace count?"
5. "When does your Anaplan fiscal quarter close, and what is the specific deadline for pricing authority on this Anaplan renewal?"

ANAPLAN INSIDER NOTE

Asking Anaplan to disclose the Anaplan uplift rate and its contractual basis — specifically naming the Thoma Bravo acquisition as context — in Call 1 does three things simultaneously: it signals commercial preparation that the Anaplan account team escalates to VP level, it converts the Anaplan uplift from an embedded renewal assumption into a disclosed mechanism that must be justified, and it establishes that the buyer understands PE ownership commercial dynamics. Anaplan account teams under Thoma Bravo are measured on net revenue retention; a buyer who names the PE acquisition, challenges the uplift rate before the proposal exists, and references OneStream as a formally evaluated Anaplan alternative is the highest-priority Anaplan churn risk in the account team's book.

Deflect these Anaplan deflections, word for word

- They frame the Anaplan uplift as CPI-linked or market standard: "CPI linkage is an Anaplan commercial decision. Disclose the contractual Anaplan basis and we will address the Anaplan escalation mechanism as a separate negotiating point."
- They push additional Anaplan use cases or connected planning expansion: "Every Anaplan use case addition is its own commercial decision based on active deployment and an active business case. Quote the current Anaplan footprint first."
- They argue OneStream or Pigment do not match Anaplan's connected planning breadth: "Breadth is a platform decision. This is a commercial discussion about the per-workspace and per-user rate at our active Anaplan footprint."
- They offer an Anaplan value realization or model optimization review: "After the Anaplan commercial baseline is agreed. Anaplan technical and commercial tracks are separate."

CLOSE WITH THIS

"Action items: Anaplan active user counts by workspace and user tier from your telemetry, workspaces with fewer than five active users identified, the Anaplan uplift rate and its contractual basis in writing, and the per-workspace and per-user rate at our active counts, all within two weeks. Our next Anaplan commercial call is [date]. Anything sent to anyone else on Anaplan commercials comes back to me unanswered."

CALL 2: THE ANAPLAN DECONSTRUCTION CALL

AFTER THE FIRST ANAPLAN QUOTE, T MINUS 4 TO 3 MONTHS

Goal: *reduce the Anaplan workspace count to active production workspaces, downgrade dashboard-viewer Anaplan users to Connect tier, challenge and eliminate the Anaplan uplift, put OneStream and Pigment on record, and force Anaplan pricing authority into the room. Never react to Anaplan numbers in the meeting where you receive them.*

OPEN WITH THIS

> “We have reviewed the Anaplan proposal against our workspace audit and user tier audit. Our active production Anaplan workspaces are [n]. Our Anaplan development, test, and sandbox workspaces that are consolidated or deleted are [m]. Our Anaplan Full Access Users whose primary activity is dashboard viewing are [p] Connect User candidates. Walk me through each Anaplan line against those actuals.”

The six moves of Anaplan Call 2

– **Reduce the Anaplan workspace count.** “Active production Anaplan workspaces are [n]. Development and test Anaplan workspaces with fewer than five active users in the past 90 days are consolidated into [n] shared Anaplan development environments or deleted. The Anaplan renewal is [n plus shared dev count] workspaces. Take that as a lower Anaplan invoice, not as credit toward new Anaplan use cases.”
– **Downgrade Anaplan dashboard viewers to Connect tier.** “Anaplan Full Access Users whose primary Anaplan activity in the past 90 days is dashboard viewing and pre-built scenario running — not Anaplan model building or Anaplan configuration changes — are downgraded to Anaplan Connect tier. The Anaplan Full Access User count is [active builders and configurers only]. The Anaplan Connect User count is [remaining dashboard viewers]. Take the difference as a lower Anaplan invoice.”
– **Kill the Anaplan uplift.** “The Anaplan annual escalator closes at zero or at a cap of [1 to 2] percent in the Anaplan order form. Thoma Bravo’s acquisition return model is not an obligation our organization accepted. The Anaplan uplift is negotiable and we are negotiating it now.”
– **Put OneStream and Pigment on record against Anaplan.** “For the Anaplan financial planning and FP&A workload, OneStream has quoted [amount] for equivalent consolidation, close, and planning functionality. Pigment has quoted [amount] for the Anaplan operational planning scope. The Anaplan per-workspace and per-user rate needs to reflect those alternatives before we commit to the Anaplan renewal.”
– **Challenge any Anaplan use case expansion in the proposal.** “Anaplan [proposed use case] is removed from this Anaplan renewal. It is its own commercial decision with its own business case, its own Anaplan deployment plan, and its own timeline. Close the current Anaplan footprint first.”
– **Summon Anaplan pricing authority.** “For the next call, bring whoever owns Anaplan pricing authority on this account. I do not run final Anaplan rounds with people who cannot approve.”

> **CLOSE WITH THIS, AND ONLY THIS**
>
> “No Anaplan counteroffer today. If the Anaplan workspace count lands at active production workspaces, the user tier is right-sized, and the Anaplan uplift is capped, we can discuss the Anaplan connected planning expansion roadmap for the next term. You now know the Anaplan order of operations.”

HOW THE ANAPLAN SIDE OF THE CALL IS PAID, AND WHY IT IS YOUR LEVERAGE

Anaplan AEs under Thoma Bravo are measured on net revenue retention. A workspace reduction, a user tier downgrade, an uplift challenge, and a named OneStream evaluation are compressing every Anaplan metric simultaneously. OneStream is particularly effective because it is the most specific and credible Anaplan alternative for the financial planning use case — Anaplan account teams cannot dismiss a OneStream evaluation with general platform arguments the way they can dismiss less mature alternatives. A formal OneStream evaluation with a procurement sponsor escalates to Anaplan VP of Sales level quickly.

Know what is cheap for Anaplan to give: additional Anaplan Sandbox workspace access at nominal rates, Anaplan Academy training credits, Anaplan model health assessment services, and Anaplan CoE community access. Know what is expensive at Anaplan: the per-workspace rate and the Anaplan annual uplift elimination. Trade cheap Anaplan concessions for expensive ones on every call.

CALL 3: THE ANAPLAN CLOSE CALL

TIMED TO ANAPLAN'S JANUARY CLOSE WINDOW

Goal: *convert Anaplan leverage into signed paper inside Anaplan's January close window. Everything lands in the Anaplan order form; the desk honors paper only.*

> **OPEN WITH THIS**
>
> "We are prepared to sign the Anaplan renewal inside your close window if the remaining items land. Here is the complete Anaplan list. Nothing gets added by either side after today, including by us."

The Anaplan final asks checklist, read it out loud

1. Anaplan production workspaces at [n], with shared Anaplan development environments at [m], each as a separate Anaplan order line with separate per-workspace rates.
2. Anaplan Full Access Users at [n active builders], Anaplan Connect Users at [m dashboard viewers], each at their Anaplan tier rate, confirmed as separate Anaplan order lines.
3. Annual Anaplan uplift capped at [0 to 2] percent for the full term, written into the Anaplan order form, not referenced from an Anaplan schedule or side letter.
4. Anaplan use case expansions removed from the current Anaplan committed footprint; each available as separately contracted Anaplan additions with their own business case and their own commercial timeline.
5. Per-workspace and per-user Anaplan rates confirmed as Anaplan price schedules; any mid-term Anaplan addition inherits these rates and this end date.
6. All Anaplan products co-terminated to one date; any mid-term Anaplan addition inherits this pricing and this end date.
7. A pre-agreed short Anaplan extension at current pricing as fallback, so their January deadline is theirs alone.

> **TWO ANAPLAN TRADING LINES THAT WORK**
>
> "A multi-year Anaplan commitment closing inside your fiscal year, from an organization that has received OneStream and Pigment quotes and completed a workspace consolidation, is a retention story your Anaplan account team takes upstairs. What does that combination buy us on the per-workspace Anaplan rate and the Anaplan uplift cap?" And when it stalls: "The OneStream evaluation has a decision date for the Anaplan FP&A workload. The question is whether the Anaplan per-workspace rate and the Anaplan uplift cap land before it does."

3. THE ANAPLAN TIMELINE, END TO END

WHEN	WHO	WHAT HAPPENS
T minus 12 to 9 months	**You**	Anaplan workspace audit, user tier audit, Anaplan uplift history documented, OneStream and Pigment quotes gathered, inactive Anaplan workspaces consolidated or deleted, single voice announced.
T minus 9 to 6	**Anaplan Call 1**	Anaplan framing call. Thoma Bravo acquisition named, OneStream and Pigment on record, active workspaces demanded, uplift rate and contractual basis requested before proposal, user tier actuals demanded.
T minus 6 to 4	**Anaplan**	Anaplan proposal arrives with contracted workspace count, uplift embedded, use case additions included. Acknowledge, do not react, price each Anaplan line against the workspace audit and user tier data.
T minus 4 to 3	**Anaplan Call 2**	Anaplan deconstruction. Workspace count reduced, users downgraded to appropriate Anaplan tier, uplift challenged, OneStream and Pigment on record, additions removed, Anaplan pricing authority summoned.
T minus 3 to 2	**You**	Written conditional Anaplan counter at active workspace and active user tier counts. Anaplan admin console confirms the workspace and user audit.
Final 6 weeks	**Anaplan Call 3**	Anaplan close aligned to January window. Complete Anaplan list on the table, Anaplan extension pre-agreed as fallback, nothing new from either side.
Signature	**Both**	Every Anaplan concession in the order form: workspace count, per-workspace rate, user counts by tier, per-user rates, Anaplan uplift cap, use case exclusions, co-termination date confirmed line by line.

4. CUSTOMIZE THE ANAPLAN SCRIPT TO YOUR SITUATION

IF THIS IS YOU	CHANGE THIS IN THE SCRIPT
Primary FP&A and financial planning use case	OneStream is your strongest Anaplan competitive lever. OneStream provides unified financial close, consolidation, and planning in a single platform that directly competes with Anaplan for the CFO and FP&A use case. OneStream has lower per-user complexity for financial planning workloads and a strong track record of Anaplan displacement at enterprise accounts. Obtain an OneStream quote before Anaplan Call 2 and present it in Call 2 with the specific Anaplan financial planning workload it covers. Anaplan account teams take OneStream seriously; the OneStream reference escalates faster than generic competitor references.
Anaplan used across FP&A, supply chain, and sales planning	Multi-domain Anaplan deployments have different workspace consolidation opportunities by domain. FP&A Anaplan workspaces are typically production-critical and high-user-count; sales planning Anaplan workspaces often have lower active user counts and less frequent model updates; supply chain Anaplan workspaces may be more operationally critical. Audit by domain before the renewal: the Anaplan workspace reduction opportunity is not uniform across planning domains, and the competitive alternative (OneStream for FP&A, Pigment for sales planning) differs by domain as well.
Workday HCM or Workday Financials in estate	Workday Adaptive Insights is the Anaplan competitive alternative for organizations already on Workday. Workday Adaptive Insights provides integrated financial and workforce planning that connects natively to Workday HCM and Workday Financials data without the integration overhead that Anaplan requires for Workday data connectivity. Obtain an Adaptive Insights quote from your Workday account executive before the Anaplan renewal; the native Workday integration advantage is a strategic argument that Anaplan cannot match.

5. ANAPLAN QUICK REFERENCE: THE ONE PAGE YOU BRING TO EVERY CALL

PRINCIPLE	THE LINE OR THE RULE
Active Anaplan workspaces, not total workspaces	"Quote the Anaplan renewal at our active production workspace count before anything else." Contracted Anaplan workspace counts include development and test workspaces that inflate the total far above the active production planning footprint.
Never react live to Anaplan numbers	Anaplan numbers and proposals received in a meeting get acknowledged, never answered. Respond on your clock, in writing, days later.
Name the Thoma Bravo acquisition	Name Thoma Bravo in Anaplan Call 1. The Anaplan uplift under PE ownership is a commercial fact; naming it signals preparation and escalates the Anaplan conversation past the account team level.
Their calendar	Anaplan historically closes in January; confirm the specific Anaplan fiscal quarter and deadline in Call 1. Final Anaplan asks target six weeks before the January close, not six days.
OneStream is the Anaplan anchor	Bring a specific OneStream quote for the Anaplan FP&A workload to Call 2. OneStream is the most specific and credible Anaplan alternative in the financial planning market; the reference escalates faster than general competitor mentions.
Anaplan user tier audit before renewal	Full Access Anaplan Users who view dashboards and run pre-built scenarios are Anaplan Connect Users. Downgrade before the renewal baseline is built; the per-user cost delta is significant.
Cap the Anaplan uplift first	Anaplan annual escalator capped at zero to two percent in the Anaplan order form. The Thoma Bravo acquisition return model is not the buyer's commercial obligation. Ask for the contractual basis; challenge the rate before the proposal exists.
Anaplan paper only	The Anaplan order form. Connected planning vision presentations, Anaplan model health assessments, and CoE excellence awards are conversation, not contract.

FIVE ANAPLAN SENTENCES THAT REPRICE THE DEAL AGAINST YOU

- "The Anaplan uplift is standard and tied to Anaplan platform investment." Platform investment is Anaplan's R&D obligation, not a commercial justification for an annual escalator. Challenge the rate and its contractual basis before accepting it as standard.
- "We need all those Anaplan workspaces for development and testing." Development and testing Anaplan workspaces can be consolidated into shared Anaplan environments at a fraction of the production Anaplan workspace cost. Audit the active user count in each Anaplan dev and test workspace before renewing at the full contracted Anaplan count.
- "OneStream doesn't have Anaplan's connected planning flexibility." OneStream is deployed at major enterprise accounts for financial close, consolidation, and FP&A planning at comparable scale to Anaplan. Evaluate the specific Anaplan FP&A workload against OneStream before conceding the flexibility argument.
- "Our Anaplan Full Access Users need that access for their planning input roles." Planning input via pre-built forms is a Connect User capability. Confirm the specific Anaplan capabilities each user needs before accepting Full Access rates for dashboard viewers and data entry users.
- "Let's add the Anaplan supply chain planning module while we are at renewal." Every Anaplan use case added at renewal is a committed cost without deployment evidence. Pilot after the core renewal closes; commit when active deployment and business ownership are confirmed.

6. WHAT GOOD LOOKS LIKE AT ANAPLAN SIGNATURE

A well run Anaplan renewal closes with production workspaces at their active count, Anaplan user tiers right-sized to actual activity type, and an annual Anaplan uplift capped in the order form. Use case expansions are out of the footprint. Per-workspace and per-user rates are confirmed as price schedules. OneStream and Pigment are standing competitive references refreshed at each Anaplan renewal.

It delivers the position that compounds: an Anaplan account team under PE ownership that knows workspaces will be audited, user tiers reviewed, and the Anaplan uplift challenged every cycle. Against a vendor whose growth model depends on workspace counts that include inactive environments and Full Access rates that include dashboard viewers, the buyer who audits, downgrades, and names OneStream is the buyer whose connected planning spend reflects what is actually deployed.

USING THIS DOCUMENT

Fill every [bracketed item] before the Anaplan call. Consolidate inactive development and test workspaces before Call 1. Pull the Anaplan user activity log before Call 1. Obtain OneStream and Pigment quotes before Call 2. If the conversation leaves the script: "Let us come back to each Anaplan workspace at its active use case and each user at their actual activity tier first."