

Typeform: Building a More Cohesive and Strategic Approach to Financial Operations

Typeform, known for its innovative form-building service, caters to a diverse clientele of over 150,000 businesses. Driving 500 million responses annually, Typeform has created a unique space for itself by providing visually engaging forms, surveys, and quizzes and offering users an enjoyable and interactive experience that makes forms brandable and effortless to fill out.

With a vision of sustainable and scalable growth, the company faced challenges navigating the uncertainties of its continually evolving business landscape and needed a flexible and agile financial planning process. Recognizing the need for change, Typeform began to search for a solution to streamline reporting, enhance accuracy, and conduct more efficient financial management and workforce planning (WFP) processes.

Approach

The need for a strategic shift towards a more streamlined and error-resistant solution prompted Typeform to actively seek a tool that would address immediate concerns and set the stage for resilient financial management in the future. The tool they decided to implement was Anaplan.

Typeform selected Keyrus as its implementation partner because of its proven expertise in Anaplan FP&A and WFP solutions. The collaboration with Keyrus became a critical aspect of Typeform's success, resulting in a smooth and effective transition to planning using Anaplan.



The Challenges:

- Stuck in financial processes heavily dependent on numerous spreadsheets, each loaded with complex formulas, resulting in a problematic and error-prone month-end reporting process.
- An elaborate web of formulas extended the reporting period and introduced various errors, impacting the accuracy and efficiency of the financial processes.
- Excel-based workforce headcount and acquisition planning hindered management's ability to react quickly to changing market demands.

Key Results:



Benefits

Adopting Anaplan brings transformative benefits to Typeform's financial and HR processes. The platform's capability to manage and centralize various data sets to provide a unified overview across the organization has translated into tangible time savings and improved financial control for Typeform. The impact of connecting financial and workforce planning has resulted in a pivotal shift in Typeform's financial management strategy, enabling a proactive and strategic response to challenges.

Ozzie Rangel, Finance Operations Lead at Typeform, shared that "Anaplan has revolutionized the way we work by enabling us to shift our focus towards efficiencies and integrations within a single platform, eliminating the need for juggling multiple platforms and spreadsheets. This not only simplifies our workflow but also ensures a more cohesive and strategic approach to financial operations."

As Typeform continues on its Anaplan journey, the focus remains on further tailoring the platform to its specific needs. The company is committed to improving user experience with more intuitive dashboards and expanding models to incorporate critical processes like Monthly Recurring Revenue (MRR), revenue, and commission modeling. These initiatives align seamlessly with Typeform's dedication to optimizing its financial and HR operations, marking the next phase of its transformative Anaplan journey. The strategic adoption of Anaplan and ongoing refinements positions Typeform at the forefront of management innovation within its industry.