

Participant Notebook

SOLUTION ARCHITECT BOOTCAMP
FEBRUARY 2023

Schedule

Day 1 — Tuesday

Time	Session
9:15	Data Best Practices
9:45	Data Integrations
10:30	Break
10:45	Use Cases
11:30	Coaching Fundamentals
12:15	Lunch
1:00	How to Guide Technology-Focused Process Conversations
2:20	Break
2:30	Scoping New Work
3:20	Workspace Sizing
3:45	Client Interactions
4:30	Day 1 Wrap Up

Day 2 — Wednesday

Time	Session
9:10	Lists and Hierarchies
9:50	Selective Access and User Roles
10:30	Break
10:40	Architecting for Scale
11:30	Workflow
12:00	ALM
12:30	Lunch
1:30	UX Design
2:30	Group Presentation
3:00	Break
3:15	Delegation
4:00	Day 2 Wrap Up
6:00	Dinner at Parlor Pizza

Day 3 — Thursday

Time	Session
9:20	Design Principles
10:30	Break
10:45	Giving Meaningful Feedback
11:30	Lunch
1:30	PMO
3:00	Break
3:10	Bootcamp Wrap Up

Opening Reflections

Take a few minutes to respond to each prompt below:

1. Why did you want to attend SA Bootcamp?
2. What is the greatest strength you bring to the Solution Architect role?
3. What are the biggest hurdles in the transition from model builder to solution architect, and what are some ways to overcome them?

Activities & Client Scenarios

Work through each scenario below in your small group, then be ready to present your approach and reasoning to the full cohort.

1) Hierarchy Scenario

You are working with Employee data and your client wants an administrator to input a Job Role for each Employee.

Your client has requested to see this information displayed in an Employee Hierarchy based on this input.

How would you structure the data input and the display of this information?

2) Coaching Scenario

A new model builder has taken 2 hours to complete a task that you estimated should take them 1 hour.

How would you approach this situation?

3) Selective Access Scenario 1

You are working with Employee data and your client wants an administrator to input a Job Role for each Employee.

Your client has requested to see this information displayed in an Employee Hierarchy based on this input.

How would you structure the data input and the display of this information?

4) Selective Access Scenario 2

"I want to give my planners the ability to submit a plan for their categories and once that plan is submitted it needs to be locked."

5) Architecting for Scale Scenario 1

You are working with a global shipping and logistics company. They have a global user base of 10,000 sales representatives and want to use Anaplan as a solution to determine those sales reps' territories, set their targets (quota), and calculate their incentive pay. Assume this company has 10M accounts that are evenly distributed amongst their sales team for coverage and that each sales representative needs to log in to Anaplan to (1) view their compensation and (2) make inputs for scenario modeling.

What questions would you ask them about the following to feel confident that you can design a scalable solution in Anaplan? What is important to consider in each?

The volume of data imported

The volume of data used for planning, calculations, and reporting

Optimizing performance so that any action (except a regular data integration job from upstream systems) takes less than 3 seconds to perform

Ensuring a consistent user experience for all users

6) Architecting for Scale Scenario 2

A client wants to see the following data associated with their customer accounts:

- Monthly Booked Revenue by Product
- YTD Billed Revenue by Product
- Monthly Gross Margin by Product
- Customer City
- Customer State
- Customer Country
- Assigned Sales Representative
- YTD Customer Quota by Product

They would like to see this displayed in a single grid in the UX. How would you structure this? Are there any questions you would ask, or different ideas you would propose?

7) UX Design Scenario

Create a board/worksheet set of templates based on workflow, selective access, hierarchies management, sales, and executive reporting needs — an FP&A Revenue Planner.

The purpose of the board is for a Finance analyst to plan for revenue by Beverage Division/product (Soda/Juice/Water) by Region/State (NE/New York, Midwest/Illinois).

I'd like to be able to make top-level adjustments and see them trickle down. I need help figuring out which products/states to focus on.

I also need to be able to compare forecast to budget and actuals to budget to see where we have problems.

Once complete, I need to submit my plan to my manager for approval — Forecast.

Closing Reflections

Take a few minutes to respond to each prompt below:

1. What was your biggest takeaway from this week?
2. What is one commitment you can make as you take on this new role?