



## Scaling Smarter: Everest Global Elevates Workforce Planning with Anaplan

Everest Global, Ltd. is a publicly traded global underwriting leader known for providing world-class property, casualty, and specialty reinsurance and insurance solutions that help businesses manage risk and seize opportunity. With a disciplined approach to capital, nearly half a century of industry experience, and a presence in more than 115 countries across six continents, Everest underwrites not just risk but also growth, resilience, and long-term value for its clients, partners, and communities.



### Business Challenges

As Everest experienced rapid global growth, the organization faced mounting complexity in its workforce planning processes. Headcount was increasing quickly, outpacing visibility into hiring, staffing costs, and budget alignment, particularly across its international footprint. Disconnected HR and finance systems, reliance on legacy manual planning, and a lack of integrated visibility made workforce forecasting time consuming and error prone. The absence of a unified process created inefficiencies and risk, leaving leaders without a single source of truth for headcount, compensation, or strategic workforce decisions.

### Approach

To modernize its workforce planning and better align HR with financial strategy, Everest partnered with Peloton Consulting Group to implement a connected Anaplan workforce planning and allocation modeling solution. The initiative integrated Everest's HR data from Workday directly into Anaplan, enabling standardized, bottoms-up planning and automated data flow across the enterprise.

Peloton helped design a flexible model that supported both detailed operational headcount planning and broader allocation logic for international currency and costs. The solution automated previously manual processes, reduced risk, and empowered users with real-time data and scenario modeling. This model brought finance and HR onto a shared planning platform that supports decision-making at scale.

### Business Impact

The transformation delivered significant operational and strategic value. Workforce planning was streamlined as end users could now adjust forecasts directly in Workday and see them flow into Anaplan's centralized planning environment. The new workflow minimized inaccuracies and dramatically reduced planning cycle time.

By incorporating transactional currency into allocation planning, the solution enabled uniform reporting and visibility across global operations. The organization achieved a single source of planning truth, improving alignment between finance and HR, and reducing the risk of unbudgeted headcount changes or unexpected financial variances.

This unified approach also improved transparency and collaboration across departments, enabling strategic resource allocation and more accurate forecasting tied directly to broader business goals.

## Summary

Everest Global's workforce growth journey required a modern, integrated planning approach that could keep pace with expansion while aligning HR and finance. Working with Peloton Consulting Group, Everest implemented an Anaplan-based workforce planning and allocation model that replaced fragmented legacy processes with an automated, real-time solution.

The outcome is a more efficient, transparent, and scalable planning capability that provides leadership with the trusted insight needed to make confident decisions. Everest is positioned to support continued growth and strategic agility in a dynamic global market.



## About Peloton Consulting Group

Peloton Consulting Group has the vision and connected global capabilities to help organizations envision, implement, and realize the benefits of digital transformation. Our team has the best practices, knowledge, industry expertise, and know-how. We make digital transformation a reality by leveraging AI, Enterprise Performance Management (EPM), Enterprise Resource Planning (ERP), Supply Chain Management (SCM), Human Capital Management (HCM), Customer Experience (CX), Analytics, and Data Management for the cloud. Through connected capabilities, we bring people, processes, and technology together. We help organizations go further, faster. That is the Peloton way!