When faced with planning in the shape of cost and budget planning, forecasting or financial planning, the first thing that springs to mind is complex Planning Software like Oracle Hyperion Planning, SAP Planning and other exhaustive Enterprise Planning Software. Even though these systems are appropriate for complex planning scenarios there is a huge set of less complex cases, known as agile planning scenarios, which demand for easier and more flexible tools. Applying Enterprise Planning Software here is often too time consuming, over-sized and very often people that are involved within these scenarios are not experts in using such systems.

In this space Mindjet is providing visual and easy to use software which supports very flexible planning and calculation capabilities. The initial creativity phases are especially well supported which enables users to quickly deliver a first plan and visualisation makes it easier to understand and communicate the plans in a team. Where re-structuring and extensibility of existing plans is required Mindjet provides a very sophisticated solution. Therefore Agile Planning is very well supported.

In this paper we will describe the demands and requirements for described scenarios. The goal is to show for which planning scenarios Mindjet can be used and for which the more complex systems are mandatory. We want to illustrate the value Mindjet can bring and how Mindjet can be applied within the planning process.

Overview of Sections and Content

- **Section 1 - Executive Overview:** In this section we show that there is a gap in tools for addressing Agile Planning scenarios where the application of complex Planning Software is more or less unsuitable. We will explain why and how Mindjet is filling this gap.
- **Section 2 – How it Works – Big Picture:** A high level overview is given on how we support planning processes. An outline of what we are addressing in the phases of planning is provided. Also we will shortly explain the Mindjet platform and its components.
- **Section 3 - Running Example:** A detailed and running example will illustrate how we are supporting the different phases within a marketing budget planning process.
- **Section 4 - Functional Overview:** Outline of Planning functionalities with a rating as to the extent Mindjet addresses them.
- **Section 5 - Summary**
1. Planning and how Mindjet fits

One of the objectives of this paper is to provide criteria to decide for which planning scenarios classical Enterprise Planning Software may be too oversized and inflexible. Therefore, we first want to show that there is a gap in tools for addressing certain simpler planning scenarios. Based on this, we will then describe how and where Mindjet fits into planning in order to fill this gap.

A Demand for easy and flexible Agile Planning Tools

There are highly complex planning scenarios (like financial planning and capacity planning in production environments) where Enterprise Planning Software is appropriate, scenarios which require complex calculations, integrations with business information systems and complex dashboard and reporting functionalities.

But there is also a huge range of agile planning scenarios where the complexity of Planning Software is not needed. The efforts of using such a system can even be counter-productive and too time consuming. Typical examples here are account planning, forecasting or marketing budget allocation but also cost and budget planning in business projects, as well as subsets of capacity planning and finance planning.

Often agile planning only requires simple hierarchical calculations and they are of low or medium complexity. In general, there is no need for complex calculations, multidimensional analysis or complex reporting functionality. In these scenarios, the software should be easy to use, flexible and transparent which helps to get the work done quickly.

The challenges when applying complex tools:

• Plans often need to be developed very quickly to meet short term deadlines. Setting up a new plan in Planning Software can be quite complicated and time consuming, especially when the people driving this are not planning experts.

• Setting up a first calculation structure is quite complicated especially when the overall calculation model and the input items are not clear. These creativity tasks are not well supported by current Planning Software.

• Changing the structure of plans can be quite complex and time consuming. This is a challenge in certain scenarios:
  o When developing the plan, since this is in general a quite dynamic process with a lot of changes until a plan is finalised.
  o If the plan requires a lot of structural changes. E.g. in an account plan where accounts are re-assigned or if the organisational structure of the sales team changes more often.
  o If we want to play with what-if scenarios which require structural changes.

• Transparent communication and understanding dependencies between data and information is often not easy.
When Mindjet can/should be used

In the following chapter we want to provide criteria for scenarios when Mindjet can or should be used, or where it is inappropriate.

We first take a look at core functionalities that we can and cannot address with Mindjet regarding high level calculation capabilities of Planning Software:

- **Bottom-Up Roll-Up**: Most commonly this is used in Budgeting scenarios (e.g. Sales Planning or Marketing Budget allocation). Since Mindjet currently addresses bottom-up calculations this is the most likely use case scenario where Mindjet can be applied (however, there are also top-down scenarios that can be handled, and top-down calculations are planned in forthcoming versions).

- **Top-Down Allocation (Break-Back)**: This is functionality that we typically find e.g. in Capacity Planning. Currently with Mindjet we do not support these calculations (but they are on the product roadmap). However, for plans of low or medium complexity one could still solve this by manually doing a top down distribution and do a bottom-up calculation to check the according constraints.

We see Mindjet being used in scenarios with the following conditions and requirements:

- The calculation model is of low to medium complexity and based on hierarchical bottom-up calculations. No complex cross calculations or multi-dimensional views are required.
- There is a short time-frame to develop a plan.
- People that have to develop plans are not experts and need easy and intuitive tools.
- Transparency and understanding in the team is important.
- Flexible plans are required which underlie frequent structural changes and extensions which should not require an expert every time to perform customisations.
- Driving meetings where alignment and understanding is required and ad-hoc changes and/or restructuring of the plan are mandatory (e.g. forecast and account planning meetings).
- Building context with other information to understand dependencies is mandatory.

Using Mindjet within complex Planning Scenarios

There are also complex planning scenarios where Mindjet can be used in combination with Enterprise Planning Software or together with Excel.

Since the initial creativity phases are not well covered by Planning Software, Mindjet can be used here to define goals and demands for the information model and according calculations. For certain hierarchical models Mindjet will aid to set up the initial structure with all necessary value fields. Mindjet provides a CSV-export which supports to continue to work in Excel or other systems that allow importing CSV-format. With this approach all according complex calculations can be amended in Excel or other appropriate systems. Therefore we can highly speed up the
initial creativity phases to “plan the plan” and handle more complex planning scenarios, without having to use Enterprise Planning Software.

Since Mindjet also has XML as its document format and also provides a COM-API, additional exports or even tighter integrations with other Planning systems can be implemented programmatically or based on XSLT-transformations.

**Typical Use Cases and how Mindjet fits**

<table>
<thead>
<tr>
<th><strong>Financial planning and budgeting:</strong> Requires complex calculations, management dashboards, reports and integrations with other business systems. So this is a scenario not well suited for Mindjet.</th>
</tr>
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<tbody>
<tr>
<td><strong>Sales planning and budgeting:</strong> Generally relies on bottom-up roll-ups. So this is an area which is very well supported by Mindjet.</td>
</tr>
<tr>
<td><strong>Capacity planning:</strong> Relies on top-down planning and is an area which is not well supported by Mindjet. However, since capacity planning generally also involves Sales Planning at least sub-sets of this process can be solved with Mindjet.</td>
</tr>
<tr>
<td><strong>Marketing budget planning:</strong> Such plans in general rely on bottom-up roll-ups. So this is an area which is very well supported by Mindjet.</td>
</tr>
<tr>
<td><strong>Strategic Planning:</strong> Since Mindjet addresses creativity phases and decision making this is a very well supported use case of Mindjet.</td>
</tr>
<tr>
<td><strong>Project Planning:</strong> Due to Mindjet’s sophisticated task and project planning capabilities this area is very well covered by Mindjet.</td>
</tr>
</tbody>
</table>
2. Planning with Mindjet – High Level Overview

We first will describe the values that Mindjet brings into the scenarios where typical Planning Software is too complex and inflexible. Then we provide an overview on how a planning process can be performed with Mindjet.

Values using Mindjet

Mindjet provides the following values and advantages throughout the planning process:

- **Visual**: Easy to understand and to communicate within a team.
- **Easy development**: Users can define plans and do not need any experts or programming skills. They can easily get started with quick results.
- **Easy to extend**: It is very intuitive to add more detail, including additional levels in the structure.
- **What-if Analysis**: Easily play with scenarios through flexible re-structuring or filtering capabilities based on visual and text-based tagging.
- **Context**: It is easy to add further information from other systems as well as linking to documents. This allows to consolidate with other needed information and to better understand dependencies or to find information more quickly.
- **Multi-User capabilities** with central access to maps or documents in Cloud (with co-editing) or on Microsoft SharePoint.
- **Task Management**: Tasks can be added in context to have combined plans with required activities. Mindjet also enables sophisticated task planning and management capabilities to execute and track tasks.
- **Excel Export**: Easy to implement, end-user friendly Excel Export to allow further processing of planning information

Planning Process with Mindjet

In the following chapter you will get an overview on how a planning process can be executed with Mindjet and what can be done in each step. We first take a look at the initial development of the plan:

- **Defining Goals and Options**: Visually setting up goals and requirements for a plan in a map. Apply priorities and comments in order to define what is important or nice to have.
- **Brainstorming**: Developing first ideas on what needs to be covered in the plan and what kind of information and calculations are required.
- **Structuring the information and cost model**: Putting together the hierarchical information model. This is easily done by the intuitive structuring and restructuring capabilities in a map. If the structure is appropriate extend it with according bottom-up cost calculations. Multiple calculations per topic in the map are possible.
- **Setting up Tags and Filters**: Extending plans with visual markup that enables filtering and to do What-if analysis. Filtering also enables us to check budget or costs for a
limited set of topics fulfilling certain criteria, e.g. checking the forecast for a specific account manager or getting an overview of risky deals within an account plan.

- **Building Context**: Add further information from other systems to bring data into context. This enables a better understanding of dependencies or to quickly find related information out of the context of a plan (Mindjet has data integrations with Databases, Excel, SharePoint, Outlook, and many more)

- **CSV-Export**: Can be used to initially develop a plan in Mindjet. Export it to CSV and import it to Excel or another Planning Software that supports CSV-format. Then continue to develop more complex calculations and plans based on the imported data. By this the development time of the plan can be drastically shortened.

Here are just some of the capabilities on how to work with the plan:

- **What-If Scenarios**: Based on tagging it is easy to filter for single tags or combinations of tags. Values are automatically re-calculated and the plan is reflecting the adjusted values according to the filtered view. Applying certain scenarios (i.e. by filtering) to the plan like this, enables to understand the immediate impact of a scenario to the overall costs or budget. Mindjet allows to setup and save different filter criteria.

- **Extendibility and Re-Structuring**: Extending and Re-Structuring a plan is very intuitive and easy due to the visual and hierarchical structure and the flexible re-structuring capabilities via drag and drop.

- **Driving Meetings**: Visualisation makes it easy to understand plans and to align understanding within teams. In meetings the plan can be used to communicate numbers and to interactively work on it. This may comprise changing values, playing through scenarios or extending or re-structuring the plan if needed.

- **Data-Integration**: Integrations with Databases (*DatabaseLinker*), Microsoft SharePoint and Excel allow integrating external data into a plan and using them in calculations and roll-ups. Further Integrations can be developed based on Mindjet’s COM-API.

- **Task Management**: Many plans will result in a structured series of actions. This aspect is often missing in traditional planning applications. Mindjet however, comes with a module, that enables the team to define specific actions, which will result in tasks with start-and due dates, with owners of a task and it includes inter-dependencies between tasks. Tasks will be followed through by integration in existing platforms such as Outlook, SharePoint or leveraging the build in Mindjet Tasks engine that comes with a comprehensive support of various WEB and mobile platforms such as iOS or Android. Timelines can be visualized by using the Mindjet interactive Gantt view.
The Mindjet Platform - Multi User enabled

The Mindjet platform allows storing and sharing of visual maps, documents and tasks in a central location, either Cloud based or on SharePoint. The platform can be accessed through multiple clients, desktop clients for Windows and Mac, web clients and clients for mobile devices to enable mobile working with visual maps and tasks.

The various clients are serving three different user roles, by providing different sets of functionalities. The desktop clients enable users with the most exhaustive set of functionalities. They support Power Users which need all functions to efficiently plan and execute tasks and projects. Web clients provide reduced functionality and simplified user interfaces. These clients fulfill the needs of the Casual Users. These users also participate in projects while they just have the need to access and view plans, tasks and documents with the ability to perform limited changes. Consumers can access and view plans, tasks and documents. Consumer licenses can be deployed free of charge.

Power users can make use of all clients across all platforms – including web and mobile apps. Casual users and consumers are restricted to web clients and mobile apps. Access to plans, documents and tasks via different clients are provided through a central Mindjet Cloud Service or alternatively through a shared Mindjet On-Premise-Service on Microsoft SharePoint. This infrastructure avoids inconsistent and redundant data in plans, documents and tasks. Everybody has central access to all items and thus sharing and collaboration is made easy for all users.
3. Example: Marketing Budget Allocation
To illustrate how overall planning is supported we will take a look at the annual exercise of Marketing Budget Allocation: As part of the objectives, the team needs to define a high level plan of the activities for the year and plan according costs and overall budget.

Brainstorming and Structuring

In the first step we want to capture ideas for the marketing mix resulting in activities to be delivered throughout the year. The initial phase of our planning will start with a brainstorming in Mindjet. We capture ideas by simply typing in ideas anywhere into the visual canvas. We can just use it like a digital whiteboard.

Then we can simply structure and re-structure the captured ideas by simply dragging and dropping topics.

For our budget plan we want to get an overview for each quarter of the year and the total budget for the year. Within quarters we want activities to be organised by higher level items like Webinars, Roadshows, etc. The goal is to provide a high level plan with first activities that needs to be re-fined and adjusted over the year. In Figure 1 we see the according first version of our plan where we have already started to add further details on certain activities.

Figure 1: First structure of the Marketing Budget Plan
Setting up Calculations

We now start to add costs and calculations. First we populate the cost attribute to the topic structure using the “Auto Calculation” functionality. Then we enter the cost estimations directly to each according activity. Roll-ups like Sum, Average, Max, Min and more are be available to perform the budget calculations. As we want to calculate the total cost of all planned activities, we define the type as currency and the roll-up as sum calculation.

After entering the costs for an activity, the amount will be rolled up and displayed as totals in the parent topic immediately. Costs are automatically recalculated in the upper topics as soon you enter or add new values. Calculations over several aggregation levels are supported in the topic hierarchy. This allows us to calculate intermediate results but also the overall result (see Figure 2).

Mindjet now makes it easy to restructure the plan and the included calculations are adjusted immediately. If we have budget or resource constraints in a quarter it is easy to move according activities to later quarters.

The visual representation and interactivity allows us to quickly develop cost and budget plans. Also the visual and hierarchical nature allows us to quickly see and understand intermediate results and dependencies.

Figure 2: Budget plan with bottom-up calculations
Visual Planning Process

We support a visual approach to the entire planning process. This makes the planning process truly agile and end-user friendly. In our example, we might decide that the marketing plan for Q1 is too high and then simply (by drag and drop) move a planning element (e.g. topic company X user day for € 5.000) into the customer user day hierarchy for Q2 – and the product will automatically recalculate the entire marketing plan.

Visual planning in combination with easy and fast re-structuring provides us an effective and efficient option to perform What-if analysis. If we recognise that we are running out of budget within a certain quarter of the year we can simply drag them to a different quarter. By this we can quickly check how different structures are affecting the overall budget for quarters. In the following section we introduce another powerful technique for real agile What-if analysis.

What-if Analysis based on Filtering

Markup can be used to tag topics either using visual icons or text tags allowing us to assign certain attributes or meanings to topics. The visual icons enable us to more easily identify topics which have specific attributes within the map, e.g. high priorities. And markup allows us to filter for single or combinations of attributes. This provides us a powerful tool to either play with different scenarios or to focus on specific topics and according related costs.

This enables us to quickly perform What-if analysis by setting up different sets of markup and filters. In our example we have added priorities to activities within the plan. This now enables us to filter for mandatory and nice to have items. All values automatically are re-calculated when filters are applied. This now quickly enables us to see the budget for mandatory items and if we are still in budget.
Another option to perform What-if analysis is given via re-structuring. If we recognise that we are running out of budget within a certain quarter of the year we can simply drag them to a different quarter. By this we can quickly check how different kinds of distributions of activities over the quarters are affecting the budget for each quarter.

**Working with multiple Calculations per Topic**

Within the plan we can define multiple calculations for topics. Each topic can have its own set of calculations. In the example we added tracking of the number of activities that occur in each quarter and for the overall year. Also we added the maximum expense for a quarter at the root topic of the plan (see Figure 4).
Within the plan we can define multiple calculations for topics. Each topic can have its own set of calculations. In the example we added tracking of the number of activities that occur in each quarter and for the overall year. Also we added the maximum expense for a quarter at the root topic of the plan (see Figure 4).

Note that further calculations can be added at any time. This provides us with the flexibility to easily extend the plan whenever needed.

**Building Context**

![Image of a map with integrated information]

**Figure 5: Integration of other information**

We can now add further organisational information and build context with other information. E.g. for the roadshow event we add information about the team members. We add the contact details of our team members in this example from Outlook. This information is kept in synch with the original information, e.g. the contacts from Outlook. So if this information is changed they are also updated in the map ensuring that information is always up to date.

We can do this with Emails, Appointments and Tasks from Outlook. Also we can integrate information from other systems like SharePoint, Databases, Excel, and many more in a similar way. So we can easily bring everything needed into a visual context as needed. The original information sources can be opened directly from the map which removes the need to search for them.

In the plan we also add the initial information about locations and add hyperlinks to according web-sites to the roadshow topic. Clicking these links then opens the site directly within the map (see Figure 5). We also added further topics for more detailed budget calculations for this event. This can now be done in the same manner as seen so far. By this we can really re-fine our plan according to our needs in an easy and flexible way.
Multi-User Capabilities

The Mindjet platform allows storing and sharing maps, documents and tasks in a central location either Cloud based or on SharePoint. This provides us multi-user capabilities to collaborate on maps and setting up access rights on maps.

In the Mindjet Cloud maps can be co-edited. I.e. users can simultaneously work and edit on plans. In case one user is changing certain values these changes and also the changes due to re-calculation are immediately visible to other users also working in the map.

On Microsoft SharePoint we currently do not support co-editing. However, users can still make use of the check-in and check-out mechanisms of SharePoint and exploit all other document management and sharing functionalities provided by SharePoint.

Excel and CSV-Export

Mindjet also allows exporting a map to CSV. We can either export the complete map or starting from a selected topic within the map. Hereby all field attributes that were defined in the map and assigned values are also exported. This allows us to re-use developed plans in Excel or in other systems which support CSV-format. Here we can then add more complex calculations if required (see Figure 6).

![Figure 6: CSV export of marketing budgeting plan opened in Excel](image_url)
This also allows us to use Mindjet in combination with other Planning Software. Since the initial creativity phases are not well covered by Planning Software, Mindjet can be used to develop the plan in the initial phases of the planning process. With this method we can highly speed up the initial and creativity phases to “plan the plan” (also see section: Using Mindjet within complex Planning Scenarios - Page 3).

**Task Planning Capabilities**

Many plans will result in a structured series of actions. This aspect is often missing in traditional Planning Software. Mindjet however allows the team to define specific actions, that will result in tasks with start-and due dates, with owners of a task and it includes inter-dependencies between tasks and other attributes like priorities, status, duration and efforts. Timelines can be visualized by using the Mindjet interactive Gantt view.

Tasks can be followed in other system by integrations with existing platforms such as Outlook and SharePoint, or leveraging the build in Mindjet Tasks engine – Mindjet’s Social Task Management system - that also comes with a comprehensive support of various WEB and mobile platforms such as iOS or Android.

**Data-Integration**

Integrations with Databases, Microsoft SharePoint and Excel enable us to integrate records into a map and use them in calculations. Also further Integrations can be developed based on Mindjet’s COM-API. This allows us to use data records coming from other systems within calculations by simply using the field names coming from the records within the definition of calculations.

**Re-Usability**

Mindjet allows saving plans as map templates so they can be re-used in similar scenarios. Additionally Mindjet allows us to store so called Map Parts. These can be single topics or small topic structures. Map Parts are available in a panel and can be quickly added to a map via drag and drop. This enables us to re-use topics or topic structures with calculations to quickly assemble or extend maps.
## 4. Outline of Core Planning Functionalities

### Functions

<table>
<thead>
<tr>
<th>Functions</th>
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<tbody>
<tr>
<td>Bottom Up (Sum, Min, Max, Average, Sum-Topics, further functions are planned)</td>
<td></td>
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<tr>
<td>Top Down (planned, optionally use CSV Export and e.g. Excel)</td>
<td></td>
</tr>
<tr>
<td>Cross Calculation (planned, optionally use CSV Export and e.g. Excel)</td>
<td></td>
</tr>
<tr>
<td>What-If Scenarios based on Filtering</td>
<td></td>
</tr>
<tr>
<td>Data Integrations (Databases, Excel, SharePoint, Outlook, COM-API for extensions)</td>
<td></td>
</tr>
<tr>
<td>Dashboards and Reporting</td>
<td></td>
</tr>
<tr>
<td>OLAP Integration (using CSV Export)</td>
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<tr>
<td>Workflow</td>
<td></td>
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<tr>
<td>Multi-User Capabilities</td>
<td></td>
</tr>
<tr>
<td>Tagging (Icons and Text Tags) and Filtering</td>
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</tbody>
</table>

### High Level Features

<table>
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<tr>
<th>High Level Features</th>
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<tbody>
<tr>
<td>Brainstorming</td>
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<tr>
<td>Rapid and flexible Development</td>
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<tr>
<td>Transparency and easy Communication</td>
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<tr>
<td>Decision Making</td>
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<tr>
<td>Strategic Planning</td>
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<tr>
<td>Easy Re-Structuring and Extension of Plans</td>
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<tr>
<td>Building Context</td>
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<tr>
<td>Integrated Task Management</td>
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</table>

### General Features & Advantages

<table>
<thead>
<tr>
<th>General Features &amp; Advantages</th>
<th></th>
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<tbody>
<tr>
<td>Effective and shorter Meetings</td>
<td></td>
</tr>
<tr>
<td>Transparent Communication</td>
<td></td>
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<tr>
<td>Information Integration (Microsoft Outlook, Microsoft SharePoint, Microsoft Excel, Databases and more)</td>
<td></td>
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<tr>
<td>Export (Microsoft Project, Microsoft Word, Microsoft PowerPoint, Microsoft Excel, HTML and more)</td>
<td></td>
</tr>
<tr>
<td>Import (Microsoft Project, Microsoft Word, MPX)</td>
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<tr>
<td>Document Management</td>
<td></td>
</tr>
<tr>
<td>Task- and Project Planning and Management</td>
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</tbody>
</table>
5. Summary
In this paper we have shown that there is a high demand for planning tools that are flexible and easy to use in order to support specific, but frequent, planning scenarios. These are scenarios of less complexity and more agile, therefore we denote them as Agile Planning processes. The application of traditional Planning Software within these scenarios is too time consuming and too complex since often only a very limited set of functionality is required. People driving and executing these processes are also very often not experts in using complex Planning Software.

We outlined the characteristics of Agile Planning and the set of new requirements they have. It was shown that Mindjet delivers a very powerful but easy to use visual platform that effectively addresses the needs of Agile Planning. Users can define plans and do not need any experts or programming skills. They can easily get started with quick results. It is easy to use, to understand and visualisation drives alignment and effective communication within teams. Visual plans allow users to play with scenarios by intuitive and flexible re-structuring or filtering capabilities based on visual and text based tagging. It is easy to add further information from other systems or by linking to documents. This allows consolidation with other needed information and to better understand dependencies or to find information more quickly. Mindjet provides Multi-User capabilities with central access to maps or documents in Cloud (with co-editing) or on Microsoft SharePoint to collaborate on maps and documents.

We outlined that there are also complex planning scenarios where Mindjet can be used in combination with traditional Planning Software or with Excel. Since the initial creativity phases are not well covered by Planning Software, Mindjet can be used here, in order to fill this gap.

Overall, Mindjet is fulfilling the needs given by Agile Planning and is bridging the gap in existing tools addressing these requirements.