Anaplan

Territory and Quota Planning

Anaplan for Sales

Defining efficient territories and optimizing quotas is crucial for maximizing the power of your sales team. Using Anaplan for Territory and Quota Planning, sales leaders can leverage data from across the organization to increase the value of their sales territory and ensure that quotas inspire their reps. Powerful "what- if" scenario planning enhances efficiency and helps teams capitalize on market opportunities. Intelligent data analytics let leaders construct the perfect quota for each rep. By staying connected to the rest of the sales strategy, territories and quotas can be perfectly calibrated to advance business objectives and raise the bottom line.

Model "what-if" scenarios to optimize territory coverage. Experiment with new territory plans and evaluate the projected impact on sales. Use machine learning to create maximally efficient sales territories. Anticipate the future by testing territory models that incorporate changing market trends and go-to-market strategies.

Calculate the ideal quota for each rep directly. Use historical performance, account potential, market opportunity, territory data, and other important data to tailor quotas to reps' strengths. Employ bottom-up, top-down, or combined methods, keeping sales executives, managers, and reps active in the quota- setting process. Link quota information to incentive compensation plans (and vice versa) ensuring that quotas stay motivating and achievable.

Align territories and quotas with revenue goals and corporate objectives. Ensure that territories emphasize the most valuable market opportunities, and that quotas are designed to promote revenue targets. Easily modify territory plans to accommodate headcount changes or new priorities. Capture detailed quota data, giving executives, managers, and reps detailed insight into sales performance.

Key benefits

- Best-in-class planning applications built on the most agile planning platform
- Guided application setup, delivering embedded planning best practices and processes
- Eliminate lost opportunities by maximizing territory coverage
- Streamlined configuration, simple extension and easier maintenance
- Monitor quota attainment in real time, at any level of granularity
- Easily manage complicated territory hierarchies—geography, accounts, customers, products, and more
- Collaborate on quota targets with all relevant stakeholders
- Feed quota data into the sales forecast, and vice versa, increasing forecast accuracy
- Use machine learning to make territories more efficient
- Incorporate workflow and approval processes into the territory and quota design, eliminating unnecessary administrative work
- Use effective dating to maintain a history of territory and quota plans
- Quickly adjust territories and quotas to keep up with a dynamic market with T&Q Application
- Dramatically reduce unnecessary administrative efforts

CUSTOMER STORY

HP Inc. uses Anaplan for quotas, territories, and channel incentives for over 200,000 salespeople and partners worldwide. The company has dropped quota inaccuracies from 30 percent to 10 percent, and now saves itself from one to two percent of the more than one billion dollars it spends on channel incentives. HPE now rolls out its quotas on the first day of the fiscal year and is building predictive analytics, using AI and machine learning, into its quota-design process.

Results:
- Quota accuracy increased from 70 percent to 90 percent
- Quotas released on the first day of the fiscal year
- Territory capabilities expanded from 30,000 direct salespeople to over 200,000 partners
- Quota planning time reduced from three months to two weeks
- Quota planning automatically incorporates data from sales forecasts, market trends, sales hierarchy, and sales history, delivering an appropriate quota for each rep

" In terms of efficiency, business outcome, speed, and quality of our delivery, we've been able to improve on all our core metrics."

Yves Cabanac
Global Head of IT Digital Solutions and Enterprise Data Analytics, HP Inc

1.01. Data Hub and Model Setup - Dimensions and Attributes   MODEL OFFLINE

Configure and setup your data hub and spoke model with the transactions (facts) and hierarchies (dimensions) used in your T&Q planning application

Next: Set up your hierarchies

Data required to complete this step:

You may find it very useful to have examples of your data to reference for each of the planning process as you define your data hub and spoke model objects and attributes.

Your Anaplan COE lead or partner can also provide help with completing this step.

Select a pre-built CRM Connector
None

CRM Connector information
Plan for Custom Integration to your CRM or source data

☐ Mark Completed

Data Hub and Model Setup

78% Complete

Missing Mandatory Inputs
0

Step 1: Setup Dimensions and Facts

1. Select objects to include in the model
2. Add additional objects. While adding, select the object type. For example if adding the customer dimension, e.g., you would select "Hierarchy", if adding transactional object, e.g., invoices, you'd select "Data", if adding attributes that will be stored across two or more lists select "Multi List"
3. [Optional] Updates
   a. Rename existing objects. For example, change Account to Customers
   b. Choose a list to inherit attributes from that are selected to 'enable for calculations' within this list. This allows a list link that is used for roll ups of different data sets
4. Input the number of Items in the List

Always refresh the page before clicking Apply; if the icon below says "In Progress", wait to click Apply until a subsequent refresh changes the icon to "complete".

Dimension and Fact Setup

	Include?	Rename	Allows duplicate names	Enter the list type	Multi List?	Status	Validation Status
Orders	☑		☐	Data	☐	✓	
Order Details	☑		☐	Data	☐	✓	
Opportunities	☑		☐	Data	☐	✓	
Opportunity Lines	☑		☐	Data	☐	✓	
Account	☑		☑	Hierarchy	☐	✓	
Product	☑		☑	Hierarchy	☐	✓	
Employee	☑	Sales Rep	☑	Hierarchy	☐	✓	
Territory	☑		☑	Hierarchy	☐	✓	
NAICS Industry	☑		☑	Hierarchy	☑	✓	
Sales Role	☑		☐	Flat list	☐	✓	
Geography	☑		☑	Hierarchy	☑	✓	
Custom List 1	☐		☐		☐		
Custom List 2	☐		☐		☐		
Custom List 3	☐		☐		☐		
Custom List 4	☐		☐		☐		
Custom List 5	☐		☐		☐		
Custom List 6	☐		☐		☐		
Custom List 7	☐		☐		☐		
Custom List 8	☐		☐		☐		
Custom List 9	☐		☐		☐		
Custom List 10	☐		☐		☐		
Custom List 11	☐		☐		☐		
Custom List 12	☐		☐		☐		

▶ Apply

complete

3.0 Finalize Scenario Quota Planning by Product

AMER ⌄   Storage ⌄   New Business ⌄   FY23 ⌄   Reset

Compare scenarios by theatre, by product (or all products), and planning measure. Export planning results below.

STEP 1: Export Scenario

Select the scenario and target and click export

Finalize Scenario Selection

Select Best / Avg / Worse
Most Likely Growth %

Select Scenario
Resource Target

⬇ Export Final Scenario Plan

Legend: ● Storage ● Networking ● Servers ● Cloud ● Services

AMER   Segment Initial Target ⌄

Legend: ● Segment Target ● Resource Target

AMER   Storage

Compare Scenarios

		Best Case Growth %							Most Likely Growth %							Worse Case Growth %						
		Segment Initial Target	Segment Growth Rate	Segment Target	Resource Initial Target	Resource Growth Rate	Resource Target	Variance	Segment Initial Target	Segment Growth Rate	Segment Target	Resource Initial Target	Resource Growth Rate	Resource Target	Variance	Segment Initial Target	Segment Growth Rate	Segment Target	Resource Initial Target	Resource Growth Rate	Resource Target	Variance
AMER	Storage	$ 33,995...	42%	$ 48,143,747	$ 14,261,815	7%	$ 15,27...	68%	$ 33,995,0...	32%	$ 44,744,240	$ 14,261,815	1%	$ 14,37...	68%	$ 33,995,...	9%	$ 37,057,549	$ 14,261,815	-2%	$ 14,021,...	62%
	Network...	$ 48,715...	32%	$ 64,325,150	$ 14,261,815	7%	$ 15,27...	76%	$ 48,715,0...	22%	$ 59,453,643	$ 14,261,815	1%	$ 14,37...	76%	$ 48,715...	12%	$ 54,582,137	$ 14,261,815	-2%	$ 14,021,...	74%
	Servers	$ 23,356...	22%	$ 28,459,393	$ 15,687,997	7%	$ 16,79...	41%	$ 23,356,5...	12%	$ 26,123,742	$ 15,687,997	1%	$ 15,81...	39%	$ 23,356...	-20%	$ 18,782,624	$ 15,687,997	-2%	$ 15,423,...	18%
	Cloud	$ 27,108...	52%	$ 41,215,039	$ 14,261,815	7%	$ 15,27...	63%	$ 27,108,7...	42%	$ 38,504,163	$ 14,261,815	1%	$ 14,37...	63%	$ 27,108...	32%	$ 35,793,286	$ 14,261,815	-2%	$ 14,021,...	61%
	Hardware	$ 133,175...	37%	$ 182,143,3...	$ 58,473,442	7%	$ 62,61...	66%	$ 133,175,...	27%	$ 168,825,7...	$ 58,473,442	1%	$ 58,94...	65%	$ 133,175...	10%	$ 146,215,596	$ 58,473,442	-2%	$ 57,487,...	61%
	Services	$ 25,566...	67%	$ 42,698,216	$ 12,835,634	7%	$ 13,74...	68%	$ 25,566,6...	57%	$ 40,141,552	$ 12,835,634	1%	$ 12,94...	68%	$ 25,566...	47%	$ 37,584,889	$ 12,835,634	-2%	$ 12,619,...	66%
	Software & ...	$ 25,566...	67%	$ 42,698,216	$ 12,835,634	7%	$ 13,74...	68%	$ 25,566,6...	57%	$ 40,141,552	$ 12,835,634	1%	$ 12,94...	68%	$ 25,566...	47%	$ 37,584,889	$ 12,835,634	-2%	$ 12,619,...	66%
	All Products	$ 158,742...	42%	$ 224,841,5...	$ 71,309,076	7%	$ 76,36...	66%	$ 158,742,...	32%	$ 208,967,3...	$ 71,309,076	1%	$ 71,88...	66%	$ 158,742...	16%	$ 183,800,484	$ 71,309,076	-2%	$ 70,106,...	62%
	Storage	$ 2,193,4...	-60%	$ 877,161	$ 1,150,040	2%	$ 1,176...	-34%	$ 2,193,450	-70%	$ 657,816	$ 1,150,040	1%	$ 1,165...	-77%	$ 2,193,4...	-80%	$ 438,471	$ 1,150,040	-2%	$ 1,127,0...	-157%
	Network...	$ 3,033,2...	-46%	$ 1,632,937	$ 1,150,040	2%	$ 1,176...	28%	$ 3,033,262	-56%	$ 1,329,610	$ 1,150,040	1%	$ 1,165...	12%	$ 3,033,2...	-66%	$ 1,026,284	$ 1,150,040	-2%	$ 1,127,0...	-10%
	Servers	$ 1,056,9...	-51%	$ 521,813	$ 1,265,044	2%	$ 1,294...	-148%	$ 1,056,925	-61%	$ 416,120	$ 1,265,044	1%	$ 1,281...	-208%	$ 1,056,9...	-71%	$ 310,428	$ 1,265,044	-2%	$ 1,239,7...	-299%

Key features

Territory Planning

- Enterprise-level, cloud-based territory planning and management with geospatial mapping.
- Plan and maintain complex territory hierarchies, including geographies, accounts, and products
- Emphasize accounts and opportunities that promote company objectives
- Eliminate coverage gaps and lost opportunities
- Maximize reps' sales strengths by assigning them to the appropriate accounts
- Optimize territories with data including account potential, administrative and travel time, selling history, time from lead to close, regional trends, and more

Quota Planning

- Set targets and plan quotas using predictive data—historical performance, market opportunity, account potential, pipeline needs and more
- Tailor quotas to maximize each rep's productivity
- Keep quotas aligned with revenue targets
- Automate calculations and reduce administrative burdens
- Roll out quotas before the year begins
- Track quota attainment data at any level of granularity, in real time
- Easily modify quotas to incorporate market developments or evolving priorities
- Visualize quota data in charts, graphs, maps, lists, and other actionable packages

Flexibility

- Quickly modify territory and quota plans to emphasize new business priorities
- Realign territories to incorporate headcount changes or eliminate coverage gaps
- Give sales leaders the freedom to modify territories and quotas locally, or apply the same rules across your entire organization

Modeling, analysis, and "what if"

- Automate data analysis to easily build it into the territory and quota design process
- Use "what-if" scenarios to evaluate potential changes to territories or quotas
- Anticipate market or strategic changes by testing out new territories or quotas in advance
- Leverage machine learning to develop better territory and quota models
- Test new territories and quotas before rolling them out to the sales team

Collaboration across the organization

- Automate data exchange between territories and quotas, sales forecasts, and incentive compensation plans
- Align sales and finance by matching top-down revenue expectations and bottom-up quota targets
- Ensure that sales executives, managers, ops, and other stakeholders can participate in the quota and territory design process
- Provide a single shared source of data, eliminating version control issues
- Integrate sales capacity planning, ensuring that territories and quotas reflect accurate headcount

Simplification

- Automate data collection from across the sales organization
- Quickly analyze quota and territory data
- Manage all sales planning and strategy on a single platform

Data Integration

- Import data from Salesforce, Workday, ERP solutions, and other applications
- Incorporate information from HR, including changing titles, regions, and responsibilities

Key features of the Anaplan platform

Open data integration with Anaplan HyperConnect powered by Informatica Cloud, APIs, and ETL services through MuleSoft, Dell Boomi, and SnapLogic.

Best-in-class **security and compliance,** with role-based access control, user management, SSO support with SAML 2.0 compliance, and data encryption.

Data and metadata management uses Business Map, which visually captures the relationships and interconnectedness between data and plans to help business users and IT administrators manage their planning landscape.

Lifecycle Management provides precision and control while streamlining the design, development, testing, and delivery of planning models and forecasting scenarios.

Application integration provides easy access between Anaplan and third-party apps. For example, **Tableau visualization and analytics,** driven by Anaplan data, enables informed decision-making. **DocuSign integration** enables users to send, track, and sign documents securely and efficiently.

About Anaplan

Anaplan transforms the way you see, plan, and lead your business. By dynamically connecting financial, strategic, and operational plans in real time, Anaplan gives you the power to anticipate change, address complexity, and move at market speed. Anaplan's Connected Planning platform lets you view and contextualize current performance, forecast future outcomes to fuel growth and mitigate risk, and optimize costs so you can make faster, more strategic decisions. Anaplan helps more than 2,400 market-leading customers in over 50 countries navigate their daily planning challenges with confidence.

To learn more, visit Anaplan.com.

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