EBOOK

Optimize Execution of Sales Strategies with the Increased Agility of Anaplan on AWS

Next-generation Sales Planning, Sales Incentives, and Sales Forecasting

Anaplan

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PARTNER

· Qualified Software
· Retail Software Competency
· Supply Chain Software Competency

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Common Sales and Performance Challenges

Getting your sales performance and operations right is critical to your company—and your career. Poor outcomes have a lasting and sometimes devastating impact on business, management, executives and shareholders.

If you run a business with outdated sales and performance metrics, you may be taking costly risks that lead to diminishing returns. Ask yourself: do these common questions reveal the source of your problems?

- Are you making decisions based on a subset of data?
- Are you missing data before your make strategic decisions?
- Are all your managers and analysts using the same data?
- Is access to your data taking too much time?

Many companies continue to use spreadsheets and systems that aggregate data to understand performance. The challenge with this dated approach is that it is time-consuming and prone to errors. Many company leaders and operations teams also find that manual processes are often the root cause of forecasting inefficiencies and the inability to predict future performance.

Spreadsheet Confusion

1. Relying on multiple spreadsheets
2. Shared via email
3. Loss of version control

Territory Inaccuracies

1. Territories appear out of balance
2. Quotas are based on old, incomplete data
3. Morale is tanking

Approval Process Delays

1. Annual executive pitch plans can't change on the fly, resulting in delays
2. Data is constantly changing or being discovered, affecting your forecasts
3. Demotivating process for those in the spotlight

Annual Planning Lacks EOY Data

1. Planning starts in Q3, but revenue targets will change between then and Q1
2. End-of-year data is not easily included in new plans
3. Leadership decisions based on expected data

Resist Short-term Distraction Tangents That Pull Strategies Off Course

The traditional process of forecasting sales for the upcoming year is often riddled with challenges and inaccuracies.

Predictions based on misleading forecast information and poor sales funnel data

An inaccurate sales forecast leads to an erroneous revenue forecast, which leads to potentially costly problems since the C-Suite relies on this data for strategic market planning and staff success. If your forecast is too high, it may lead to attrition because reps cannot hit goals and get paid on their on-target earnings (OTE). However, if the forecast is too low, companies may overpay and lead to cash flow imbalances.

Challenges that lead decision-makers—Sales Directors, VPs—to a series of poor consequences:

- Focus on the wrong deals triggered by weak data
- Failure to identify better opportunities
- Lack of customer insights prevent deals from closing faster
- Need to improve rep time management
- Weak forecasting techniques
- Time-consuming forecasting rollup
- Unbalanced commission structures
- Weak management tools that lower team morale

Anaplan on AWS Improves Sales and Performance

Anaplan for Sales provides revenue leaders with real-time visibility into the drivers of sales performance and the tools needed to develop a connected revenue strategy and improve productivity. Keeping go-to-market activities aligned provides organizations with the intelligence and agility to guide sellers to attain quota and chart the best path to increased revenue.

Anaplan and Amazon Web Services are pioneers in our industries, aligned to deliver six value propositions to our joint customers.

Accelerated digital transformation

Intelligent forecasting

Smart data management

Enhanced elastic scale

Optimized cloud spend

Sustainability

Using AWS services, Anaplan gives your go-to-market activities a starting point to build on the previous year's forecast. Powerful AI and ML tools make sales forecasting and department assessment efficient and accurate.

- **Anaplan Optimizer** utilizes a collection of techniques developed to solve problems using linear programming optimization, where complex variables are reduced to linear equations to help identify the best answer.

- **Anaplan Predictive Insights** makes it easy for revenue teams to discover their total addressable market, build target audiences around critical insights, and organize campaigns at scale.

- **Start Forecasting** using AI and increase the timeliness and accuracy of your forecast to drive better planning and decision-making.

The Trusted Solution for Driving Sales and Revenue

Generate more value for your organization with improved forecasting methods using Anaplan's solution for Sales and Performance Management (SPM).

Saves time

Eliminates manual work

Automate reporting dashboards

Creates time for strategic thinking

Visibility into drivers of sales performance

Better time management

Improved collaborative process

Spend more time with customers instead of manual forecasting

"Driving top-line growth and optimizing the sales force: We do that. Anaplan gets us there."

Ian Zhao, Director, Go-To-Market, Strategy and Analytics, VMWare

Advantages and Sales Operations Efficiency

The Anaplan SPM solution offers capabilities not found anywhere else, including what-if scenario modeling, artificial intelligence (AI), and external data through predictive insights to help identify accounts with the most significant revenue potential. It is all combined into a single Anaplan-managed data hub.

Anaplan's solution is an expandable and agile platform that can grow throughout an organization and help your finance, sales, marketing, supply chain and HR teams stayed aligned.

Seven advantages Anaplan provides to the SPM process

1. **Model-to-model** imports and comparisons help review and manage quotas to ensure they align with the right compensation plans.

2. **Multidimensionality** analyzes quotes and considerations for consumption, revenue numbers, different components, and service.

3. **Variable incentive tools** help inspire sellers and retain talent while driving performance and maximizing results.

4. **Compensation budgets** can be brought into alignment with corporate objectives.

5. **Share credits** easily and disperse between sellers and teams.

6. **Improve SPIF** programs using accurate data to accelerate sales.

7. **Minimize disputes** and increase confidence within the sales organization.

Customer Success

Adobe

Challenge:

- Reaching commercial accounts was a challenge for Adobe, particularly impacting their continuous acquisition growth

- They needed a better understanding of their ideal customer profile

- Adobe lacked predictive insights and intent signals to identify potential accounts

Solution:

- Anaplan Predictive Insights provided Adobe with a high-definition picture of their ideal customers in the commercial space

- Adobe developed a predictive model to score and segment their accounts by combining these third-party insights with their first-party data, and leveraging Anaplan's powerful AI and machine learning algorithms

Results:

- **Increased win rates by 81% and increased the average deal size by 15%**

- **Adobe's sales and marketing teams gained access to technographics, hiring trends, growth trends, and buyer intent**

Customer Success

Zillow Group

Challenge:

- Compensating the company's sales employees was a cumbersome process due to the acquisition of over a dozen companies

- The legacy process was manual and unable to keep up with the company's growth

- Needed to scale efficiently

Solution:

- Zillow Group committed to Anaplan for incentive compensation

- Created multiple models to manage compensation

- Engineered integration processes with company HRIS systems

- Automated the display of pacing reports and goal-setting modules for sales employees

Results:

- **Eliminated manual sales compensation processes**

- **Transaction data is now updated as fast as every 20 minutes**

- **Sales employees and managers view their real-time earnings and performance data**

- **Self-service dashboards instantly deliver information to stakeholders throughout the company**

- **The results are better insight for sales managers and happier, more productive employees**

Customer Success

Vodafone

Challenge:

- Vodafone sales planning was inconsistent, fully manual, and operated in silos of data

- Gathering and interpreting all that loose data was imperative

- The company wanted to support sales managers but lacked the tools to be consistent, objective, and aligned with go-to-market priorities

Solution:

- With Anaplan Sales Planning, Vodafone's commercial business shaved six weeks off a three-month planning cycle and automated many mundane tasks. This freed up sales managers to support reps on better, more strategic deals while providing the success needed to inspire planning transformation in other departments.

Results:

- **Cut sales planning time in half and automated 90% of sales target-setting**

- **Reduced planning cycle from three months to six weeks**

- **Freed up sales managers to support reps better**

- **Strategic deals had more focus**

- **Other internal departments are inspired to adopt the Anaplan platform**

Customer Success

Autodesk

Challenge:

- Realizing their vision of being the most insightful, innovative, digital, and admired finance team in the technology industry was limited by internal finance functions

- Autodesk wanted to connect, optimize and automate their processes

Solution:

- Anaplan Sales Forecasting and Autodesk are driving the future of finance as partners to the business while creating financial career paths that embrace new technologies that provide real-time insights and financial reporting

Results:

- **Today, roll-up revenue forecasts are completed 80% faster**

- **Built and operate 18 Anaplan models and three Data Hubs in four categories across go-to-market finance, FP&A, and treasury**

- **Including forecast models, planning models, workforce and spend forecasting models, and enhanced support models**

Anaplan on AWS

Anaplan for Sales addresses the needs of an organization's sales process using cloud-native technologies to empower organizations to accurately understand and manage the operation of their entire sales process, from planning, through forecasting to process optimization. Through its modern solutions and flexible models, AWS creates a space for organizations to optimize infrastructure and focus on understanding disparate data sources to reveal intelligence advancing the entire organization. For that to be possible, a coordinated solution is required to bring the needs of the Sales Management team and the business into alignment. Anaplan's background in SPM, knowledge, expertise, and experience working with AWS provides critical insights and valuable features for sales leadership, revenue operations, and executive management.

Transforming strategic sales planning with a comprehensive Anaplan Platform on AWS

The Anaplan honeycomb represents commonly deployed use cases and connects Sales, Marketing, Finance, Supply Chain, and HR planning.

Anaplan provides one platform applicable throughout the entire business.

Incentives & Rewards

Workforce Planning

Quota Modeling

Talent Strategy

Compensation Modeling

Territory Planning

Revenue & OpEx Planning

Sales Forecasting

Long Range Planning

Marketing Performance

Income Statement Forecasting

Demand Planning

CapEx Planning

Sales & Operations Planning

Pricing & Promotions

Balance Sheet & Cash Flow

Supplier Collaboration ™

Supply Planning

Getting Started

Anaplan for Sales brings a business-friendly approach to intelligent SPM, enabling organizations to accurately account for cloud initiatives, improve ROI, and rationalize actual costs. Read more on how Anaplan Sales Performance Management brings harmony to the CTO, CFO, and business to manage an organization's cloud spending better.

Learn more

Website

Request a free demo

Anaplan on AWS

About Anaplan

Anaplan is a transformative way to see, plan, and lead your business. Using our proprietary Hyperblock™ technology, Anaplan lets you contextualize the real-time performance and forecast future outcomes for faster, confident decisions. Anaplan enables connected strategy and planning across your enterprise to move your business forward. Based in San Francisco, Anaplan has over 200 partners and more than 2,000 customers worldwide SPM is included in the Anaplan comprehensive solutions platform.

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