

# IDC MarketScape: Worldwide Sales Performance Management 2025 Vendor Assessment

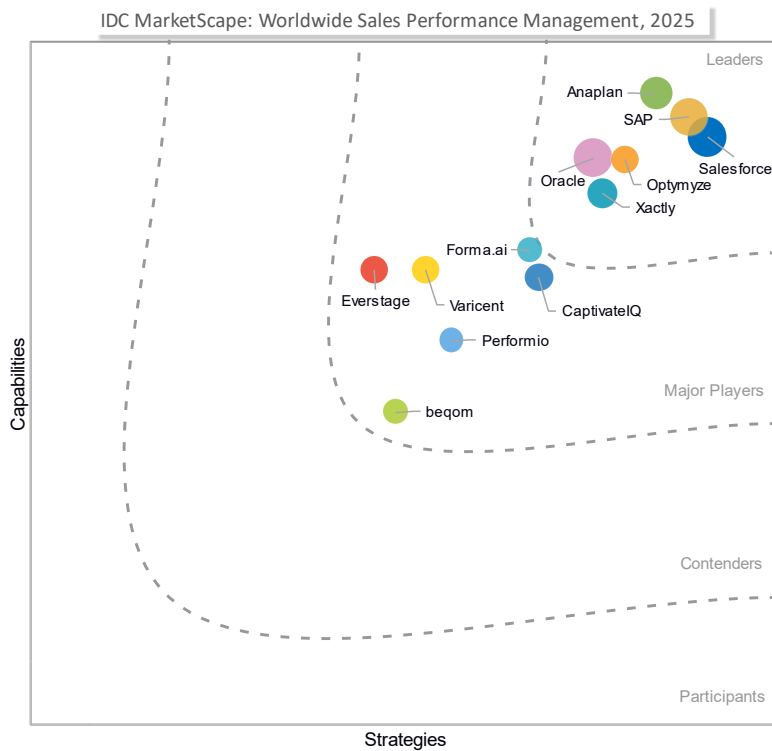
Michelle Morgan

**THIS EXCERPT FEATURES ANAPLAN AS A LEADER**

## IDC MARKETSCAPE FIGURE

**FIGURE 1**

### IDC MarketScape Worldwide Sales Performance Management Vendor Assessment



Source: IDC, 2025

Please see the Appendix for detailed methodology, market definition, and scoring criteria.

## ABOUT THIS EXCERPT

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The content for this excerpt was taken directly from IDC MarketScape: Worldwide Sales Performance Management 2025 Vendor Assessment (Doc # US52419925).

## IDC OPINION

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While not generally at the forefront of most sales organizations' software priorities, a robust sales performance management (SPM) program is critical for modern sales operations, as it significantly enhances visibility and control over core sales activities. Comprehensive SPM solutions enable accurate performance tracking, real-time monitoring of sales activities, and data-driven decision-making, leading to improved sales forecasting accuracy and better territory management. According to IDC's October 2024 *Worldwide C-Suite Tech Survey*, 39% of C-suite sales leaders identified SPM as their top technology initiative for the coming year (i.e., 2025). And yet, most SPM vendors understand that their biggest competitor remains the spreadsheet.

Sales teams that fail to integrate a comprehensive SPM solution into their operations face significant challenges that can hinder their success. Inaccurate forecasting becomes a major issue, as manual processes and disparate systems often lead to unreliable data, making it difficult to predict revenue and set realistic goals. Shadow accounting, where sales reps track their own performance due to a lack of trust in official systems, can create inefficiencies and duplicate efforts. In addition, the absence of a centralized solution fosters a lack of transparency, leaving team members and leadership without a clear view of progress, pipeline status, or performance metrics. Sales planning that is done without the use of an SPM solution further compounds these problems, as decisions are often made without real-time insights, leading to misaligned strategies and opportunities. Altogether, these drawbacks can significantly impact a sales team's productivity, morale, and overall performance.

SPM solutions are vastly superior to manual tracking in countless ways but are particularly critical for real-time visibility. Real-time visibility serves as a cornerstone of effective SPM software, delivering several advantages to sales operations:

- **Performance monitoring and decision-making.** Real-time visibility enables sales managers to monitor individual and team performances instantly, fostering accountability and allowing for quick identification of areas needing improvement. Sales teams can stay on pace with quarterly goals and avoid last-minute scrambles by having continuous access to performance metrics. This immediate feedback enables sales representatives to course-correct and improve their performance for better results.

- **Pipeline management.** Sales pipeline visibility facilitates accurate forecasting and strategic planning. Teams can track deals through each stage, identifying potential issues before they become problems. This transparency allows for data-driven decisions about resource allocation and helps prevent end-of-quarter surprises.
- **Operational efficiency.** The software automates repetitive tasks and provides centralized data management, significantly reducing time spent on manual processes. Sales representatives can focus more on actual selling and relationship building rather than administrative tasks. Real-time dashboards consolidate critical metrics such as lead conversions, deal closures, and revenue generation into easily digestible formats.

Real-time visibility strategically empowers businesses to proactively identify market opportunities and emerging trends while also enabling swift responses to changing customer behaviors. It fosters enhanced collaboration across departments by providing teams with tools to share insights, monitor progress, and communicate efficiently through features such as shared dashboards and instant notifications.

IDC defines sales performance management as a comprehensive solution that automates and streamlines sales operations across planning, tracking, and incentive compensation management. The software serves as a centralized platform for monitoring sales activities, analyzing performance metrics, and optimizing sales strategies to drive revenue growth and operational efficiency. A comprehensive SPM solution should be made up of the following distinct features with their respective capabilities:

- **Incentive compensation management (ICM).** ICM solutions automate and streamline the design, implementation, calculation, and administration of variable compensation plans for revenue-generating employees. Capabilities should include:
  - **Plan design and administration:** The software includes a robust rule engine that enables configuring complex compensation plans with precision. Organizations can utilize comprehensive plan modeling and forecasting capabilities to project outcomes. The system supports flexible compensation structures that can be easily adapted to different roles and performance metrics.
  - **Automation and calculation:** The platform performs automated commission calculations and handles payouts systematically. Teams benefit from real-time performance tracking that provides complete transparency into earnings. The software manages currency conversion for international payments while handling complex calculations with minimal errors.

- **Reporting and analytics:** Users can access real-time dashboards designed specifically for sales teams to monitor performance. The system provides comprehensive performance monitoring and demonstrates ROI through detailed analytics. Data-driven insights support strategic decision-making, while interactive reporting capabilities allow for customized analysis.
- **Quota and target management.** Quota and target management tools help organizations set, track, and optimize sales performance goals. Capabilities include:
  - **Quota planning and setting:** The software provides territory mapping capabilities to align quotas with specific geographic regions. Organizations can implement both top-down and bottom-up quota planning methodologies. The system delivers predictive insights for data-driven quota design. Teams can utilize scenario modeling to test different quota strategies.
  - **Performance tracking:** Users can access real-time analytics and performance monitoring tools. The platform offers customizable dashboards for visualization of key metrics. Teams gain detailed insights into goal attainment at various organizational levels. The software seamlessly integrates with CRM and other sales tools.
  - **Management capabilities:** The system allows for dynamic quota adjustments during market shifts. Teams can utilize collaborative planning tools for stakeholder engagement. The software performs automated analysis for quota optimization. Organizations can employ quota fairness assessment tools to ensure equitable distribution.
- **Territory management.** Sales territory management tools help organizations define, organize, and optimize geographical sales territories based on market factors and customer intelligence data. Capabilities include:
  - **Territory planning and visualization:** The software provides visual mapping capabilities that allow companies to design, scale, and manage new territories using geospatial data and demographic information. Users can clearly see each sales representative's territory through various visualizations and identify coverage gaps in real time.
  - **Intelligent lead assignment:** The system analyzes sales representatives' proximity, availability, capacity, and experience to automatically assign leads equitably within territories. This automation helps balance workloads and improve territory coverage efficiency.
- **Sales planning and forecasting.** These tools help businesses predict future sales performance and implement commercial strategies based on historical data, market trends, and pipeline analysis. Capabilities include:

- **Data analysis and prediction:** The software analyzes historical sales patterns, customer behavior, and market trends using statistical algorithms and artificial intelligence (AI)-driven analytics to generate accurate sales projections. It processes increasing volume of data while maintaining forecast accuracy and providing real-time updates to support dynamic decision-making.
- **Resource planning:** The software assists in allocating resources effectively by providing insights into staffing needs, production requirements, and territory coverage. It enables businesses to adjust their strategies based on predicted demand and market conditions.
- **Advanced analytics:** The software employs AI and machine learning algorithms to enhance forecast accuracy by identifying patterns and trends in large datasets. It provides detailed analytics to support data-driven decisions and offers customizable reports to track key metrics. This includes predictive analytics and scenario planning (“what-if” planning).

Robust SPM solutions will also provide analytics and reporting capabilities. These are features that tie together sales KPIs to provide a comprehensive view of the relationship between revenue and sales behavior, compensation, and pipeline management as well as change over time. This should include customizable reports and data visualization.

This IDC study assesses the market for sales performance management software through the IDC MarketScape model. This study is based on a quantitative and qualitative assessment of the key characteristics that explain a vendor’s success and performance in the revenue intelligence space. The evaluation of these 12 key vendors is based on a comprehensive framework and set of parameters designed to help tech buyers seeking SPM solutions.

## IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

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To be included in this IDC MarketScape assessment, participating vendors were required to meet the following criteria:

- The vendor must have reported minimum of \$10 million combined on-premises and cloud-deployed recurring revenue.
- The vendor must have customers in production (general availability) for at least one full year at the time of writing of this document.
- The vendor’s software must support the following core features as part of its solution:
  - Incentive compensation management

- Quota and target management
- Territory planning/management
- Sales planning and forecasting
- Advanced analytics

## ADVICE FOR TECHNOLOGY BUYERS

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When considering the purchase of sales performance management software, buyers should evaluate several key factors to ensure they select the best solution for their needs. Here are some critical considerations:

- **Flexibility and customization.** A robust SPM solution must accommodate various compensation plans and incentive structures, allowing organizations to create and modify plans based on their unique needs. It should support different roles and performance metrics and handle complex calculations without restricting businesses to a single approach.
- **Automation and calculation.** The platform should provide robust automation capabilities for commission calculations, reducing manual work and eliminating errors. Real-time processing ensures timely payouts, which is crucial for maintaining trust with the sales team.
- **Integration capabilities.** Seamless integration with existing business systems is vital, including:
  - CRM systems for sales data
  - HR software for employee information
  - Accounting tools for payment processing
  - ERP systems for business operations
- **Data management and security.** Strong data compliance features are essential, including:
  - Adherence to regulatory requirements such as GDPR and CCPA
  - Secure data handling protocols
  - Audit trail capabilities
- **User experience.** Sales performance management software can be very complex, particularly for administrators. Adoption of any SPM solution should have a user-friendly interface for easy navigation and offer training resources and documentation for smooth implementation and onboarding.
- **Dashboard and reporting.** The platform should offer comprehensive analytics and reporting features, including:
  - Real-time performance tracking

- Customizable dashboards for different user roles
- Forecasting capabilities
- Detailed commission statements
- **AI capabilities.** Advanced analytics should include the incorporation of artificial intelligence and be future-ready for rapid AI advancements. Regular updates and improvements are part and parcel of being prepared for what the future of AI holds.

## VENDOR SUMMARY PROFILES

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This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

### Anaplan

Based on close evaluation of the company's strategies and capabilities, IDC has positioned Anaplan in the Leaders category in this 2025 IDC MarketScape for worldwide sales performance management.

Anaplan is an enterprise-level scenario planning and analysis platform made up of connected planning solutions that enable organizations to synchronize planning and decision-making across their entire business. The platform features a scalable, intelligent architecture that combines real-time data sharing, multidimensional modeling capabilities, and AI-driven insights without requiring coding knowledge. It offers comprehensive security features including BYOK, role-based access control, and data encryption at rest. Through its unified user experience, organizations can model scenarios, collaborate with stakeholders, and make rapid decisions while maintaining data consistency across every facet of go-to-market planning. The platform helps businesses address key challenges related to change, complexity, collaboration, and scale while providing enterprisewide visibility.

### Strengths

- **Quick computations.** Anaplan's platform is powered by its proprietary Hyperblock technology, which delivers rapid computation and real-time performance analysis, enabling businesses to make swift, data-driven decisions. The platform excels at managing large datasets, ensuring high-speed processing without compromising accuracy or performance. This combination of advanced technology and computational power allows organizations to scale their planning and analytics seamlessly, even in complex and dynamic environments.



- **Continuous improvements.** Anaplan’s platform stands out for its commitment to regular feature updates and continuous improvements, ensuring it evolves to meet the dynamic needs of businesses. This proactive approach keeps users equipped with cutting-edge tools and capabilities, enhancing productivity and long-term value.

## Challenges

- **Learning curve.** One area of concern is the platform’s steep learning curve, which can require extensive training for effective use. While the software offers robust customization and features, these can be difficult to manage without expertise, especially for the average user. However, Anaplan’s out-of-the-box applications deploy quickly with embedded best practices, which improve the user experience. Soon, Anaplan will continue to streamline planning and decision-making with CoPlanner, the company’s GenAI interface.
- **Increasing competition.** The sales planning market is rapidly evolving and expanding, driven by innovation and growing demand. Anaplan must continue to identify ways to differentiate itself in seeking to capture market share. While the company has achieved significant success, it should remain proactive and focus on emphasizing the unique value it delivers to users.

## Consider Anaplan When

Consider Anaplan when your organization needs to connect and optimize complex planning processes across multiple departments, especially in sales, finance, supply chain, and workforce management. The platform is particularly valuable when you require real-time collaborative scenario modeling and “what-if” analysis capabilities, combined with AI-powered account targeting, territory planning, and quota optimization. Anaplan is an ideal choice for businesses looking to break down departmental silos and create a single source of truth for enterprisewide planning, especially when you need dynamic, agile planning capabilities that can quickly adapt to market changes and organizational restructuring.

## APPENDIX

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### Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor’s current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under



this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

## IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

## Market Definition

IDC defines sales performance management (SPM) as a comprehensive solution that automates and streamlines sales operations across planning, tracking, and incentive compensation management. The software serves as a centralized platform for monitoring sales activities, analyzing performance metrics, and optimizing sales strategies to drive revenue growth and operational efficiency.

## LEARN MORE

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### Related Research

- *The Power of Non-Monetary Incentives for Sales Reps: Why They Matter* (IDC #US52537124, August 2024)
- *Worldwide Sales Force Productivity and Performance Market Shares, 2023: Demand for Seller Adeptness and Efficiency Drives Growth in 2023* (IDC #US52053924, July 2024)

- *Worldwide Sales Force Productivity and Performance Software Forecast, 2024-2028* (IDC #US52053824, July 2024)
- *State of Sales Technology* (IDC #US52011324, April 2024)
- *Generative AI Use Case Taxonomy: The Sales Function* (IDC #US51940624, March 2024)

## **Synopsis**

This IDC MarketScape study provides an assessment of the leading sales performance management software vendors and discusses the criteria that are most important for companies to consider when selecting a sales performance management software solution.

“While spreadsheets may seem like a cost-effective solution initially, they quickly become a liability as organizations grow,” says Michelle Morgan, research manager for Sales Force Performance and Productivity at IDC. “Modern sales performance management solutions eliminate the errors and risks associated with spreadsheets by automating complex calculations, providing real-time visibility into performance, and ensuring accurate, timely payouts that boost motivation across sales teams.”

## ABOUT IDC

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International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

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