

# Sales planning excellence



Achieving the highest levels of sales excellence demands a new approach — a combination of advanced analytics, organizational engagement, strategic thinking, and operational discipline.

Anaplan is the fastest-growing provider of business modeling and planning for sales, operations, and finance. Its cloud-based platform combines a breakthrough big data engine, the Hyperblock, with a highly intuitive modeling interface that lets business users turn operational complexity into powerful, easy-to-use models. Anaplan lets customers stay ahead of critical events, rapidly model potential impacts, and course-correct on the fly.

Deloitte is a leading consulting company with leaders who possess a deep understanding of industries and sales organizations. Deloitte's sales force effectiveness practice professionals combine strategic thinking and sales experience with broad technical and operational capabilities.

## Anaplan and Deloitte

The combination of Anaplan's revolutionary planning platform and Deloitte's deep sales planning expertise will let you build a highly optimized sales plan — one based on both advanced analytics and the on-the-ground knowledge in your sales organization. More importantly, plans are aligned, transparent, and actionable increasing sales velocity and productivity. Key benefits of this new platform are as follows:

**Better connected sales organization** — Collaborate across a larger team and gather account-level knowledge from field sales managers using a platform that is accessible anytime, anywhere, and on any device.

**Real-time modeling and insights** — Using a single platform, update key drivers to resemble market conditions and instantly see results and effects to targets, quotas, and commissions.

**Faster implementations** — By combining best of industry consulting with a platform built for agile implementations, you quick start business transformation for a faster time to value.

**Integrated cloud ecosystem** — Begin to connect your cloud applications together and leverage transactional data from Salesforce.com for faster, more accurate decision making.

## Case study: Improving quota setting and territory alignment — Global technology company

### Key stakeholders

Sales leadership, sales operations, and district managers.

### The goal

To enable the sales organization, which includes more than 30,000 sales representatives and 5,000 sales managers, to better set and manage quota and have a common data model across the entire organization.

### Key challenges

#### Misalignment of sales roles and plans

Across business groups, plans had a high degree of variance due to complex product hierarchies, account structures, direct sales representatives and overlays; this made it difficult to track against a common set of key performance indicators.

#### Frustrated and disenfranchised sales representatives

The inability to model actual business realities and engage with key business stakeholders led to confused sales representatives who could not understand plans, bags, and patches. The result was increased attrition among sales representatives.

#### Rigid systems

Systems were not agile enough to respond to changing market conditions (acquisitions, new business models, etc.). Consequently, work was taken off-line and run on spreadsheets. The effect was inability to plan, forecast, collaborate, and trace data and user changes.

### The successful outcome

Joint team of Anaplan and Deloitte implemented complete territory and quota settings in six months to support more than 30,000 sales representatives and 5000 district managers in a global rollout.

#### Full transparency and visibility

Sales leadership now has full visibility into coverage gaps, field capacity, and product- and account-level targets globally.

#### Platform for business transformation

With a next generation modeling platform, the company will be able to make real-time, data-driven decisions rather than reinforcing outdated sales models. The flexibility of the platform and ease of management by business users will enable the company to implement many best practices around sales planning and effectiveness.

