# Sales Territory and Quota Planning

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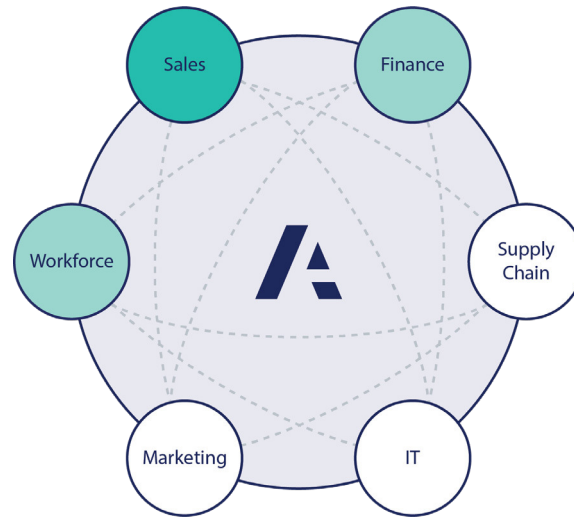
Model "what-if" scenarios to optimize territory coverage. Experiment with new territory plans and evaluate the projected impact on sales. Use machine learning to create maximally efficient sales territories. Anticipate the future by testing territory models that incorporate approaching market trends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

Calculate the ideal quota for each rep. 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

- Eliminate lost opportunities by maximizing territory coverage

- Set sales quotas before the year begins, not after

- 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

- Dramatically reduce unnecessary administrative efforts

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.

Benefits

- Quota accuracy increased from 70 percent to 90 percent

- Quotas now 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

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Key Features

Territory Planning

- Enterprise-level, cloud-based territory management platform
- 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

- Plan quotas using predictive data—historical performance, market opportunity, account potential, and pipeline needs, among others
- 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 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

About Anaplan

Anaplan is driving a new age of connected planning. Large and fast-growing organizations use Anaplan's cloud platform in every business function to make informed decisions and drive faster, more effective planning processes. Anaplan also provides support, training, and planning transformation advisory services. To learn more, visit anaplan.com.

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.

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