



# Sales Territory and Quota Planning

With Anaplan for Territory and Quota Planning, sales leaders can plan and design territory coverage and quotas assignments to optimize results. Ensure there are no territory coverage gaps, align quota assignments with revenue targets, and be data-driven—design territory and quota assignments based on historical performance, market opportunity, and account segmentation. Manage complexity and change with ease with an intuitive experience that engages all the right people in the process.

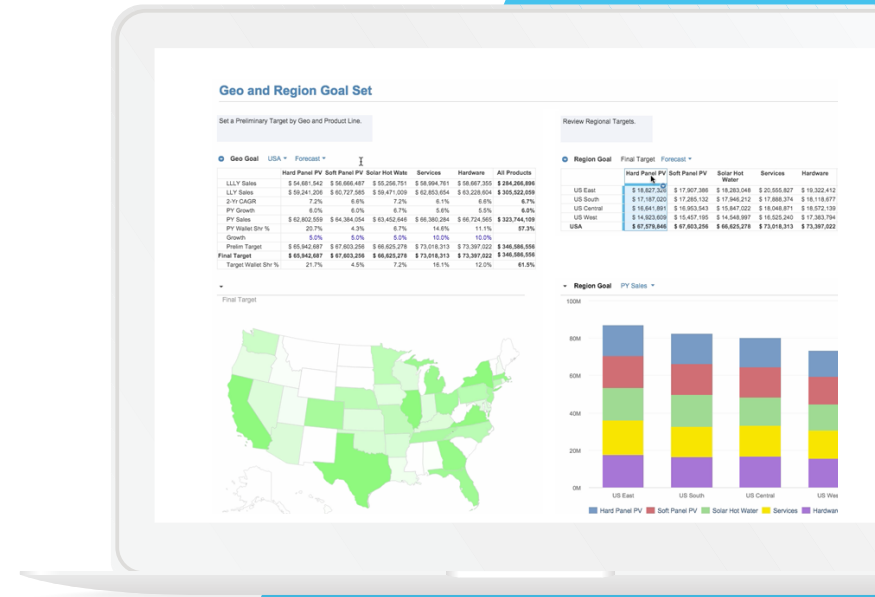
**Manage the complexity of territory hierarchies and coverage.** Plan and maintain multiple sales hierarchies that make up your sales territories, including sales structures, geographies, accounts, and products. Easily manage change to ensure complete sales coverage.

**Set data-driven quotas that can be justified to the sales team.** Set sales quotas supported by historical sales performance, market opportunity, and account segmentation data. Sales leaders and sales reps collaborate together to ensure that there is agreement on the numbers.

**Align territories and quotas with revenue goals and corporate objectives.** Use top-down/ bottom-up planning to align overall revenue goals to detailed territory coverage and quota assignments. Ensure that territory assignments and set quotas are aligned with corporate objectives.

## KEY BENEFITS

- Reduce revenue and lost opportunities by improving the sales territory coverage model and quota attainment levels
- Ensure fair and equitable territories and quotas with data-driven decisions and collaboration
- Monitor sales territory coverage gaps and unassigned quota in real-time dashboards and reports
- Maximize sales productivity across the business by setting and clearly communicating territory and quota assignments earlier
- Reduce cycle times and time spent planning territory coverage and setting quota assignments



Using Anaplan, HP cascades its strategic goals over 30,000 reps, 263,000 accounts, and 170,000 territories globally. HP now generates quotas and compensation letters promptly, maximizing selling time across the sales organization.

## Benefits

- Ensure top-down and bottom-up goals are aligned to maximize sales productivity across business dimensions
- District Manager
- Easily manage reps and overlays, and adapt to coverage gap disruption with plans that can be updated on-the-fly

## Key Features

### Configure territory definitions, rules, and assignments

Design complex sales territory hierarchies, definitions, and assignment rules to meet unique business requirements. Establish alternative sales hierarchies to plan and manage sales territories hierarchies for multiple roles and sales overlays. Manage complex sales hierarchies (e.g., geographies, accounts, customers, products, sales organization, etc.) at any level of granularity.

**Set and collaborate on quota targets** Use top-down, bottom-up, or a combined method to ensure that sales executives, sales managers, and sales reps are all included in the quota setting process.

### Build territory and quota rules with familiar formulas

Apply easy-to-use, Excel®-like formula builder to configure territory and quota assignment rules.

**Visually manage sales hierarchies** Manage changes through a drag-and-drop user interface. Aggregate or roll up sales data at any level in the sales hierarchies (e.g., geographies, accounts, customers, products, sales organization, etc.)

**Manage territory and quota proactively** Monitor sales quota attainment across the sales organization at any level of granularity. Configure visual alerts with specific thresholds (e.g., territory coverage gaps, over/under-assigned sales quotas, quota attainment risks). Continuously align and adjust sales quotas targets with revenue plan to ensure that the numbers reconcile.

### Analyze territory and quota with data visualizations

Built-in dashboards, reporting, and analytics with data visualization (charts, graphs, maps, etc.). Dashboards and reports are updated immediately. Analyze territory definitions, territory coverage, quota attainment levels, and other sales performance metrics to make better decisions with actionable insights.

**“What-if” scenario modeling and analysis** Create “what-if” scenarios and modeling to analyze the impact to the sales forecast if a specific business, economic, or competitive situation were to occur. Prepare for challenges that you could encounter in your upcoming deal cycles.

**Support data integration (import and export)** Integrate with any upstream or downstream system using a pre-built connector to Salesforce, third-party connectors (e.g. Mulesoft, Dell Boomi, SnapLogic, and Informatica) or self-service import and export with Excel.

**Enable MS Office integration** Utilize integrations with Microsoft Office™ Excel®, Word®, and PowerPoint® to provide productivity and efficiency when delivering presentations or reviewing performance and metrics in sales meetings.

### Implement top security with reduced IT costs

Single, continuously monitored multi-tenant cloud platform and infrastructure. Role-based security, user management and single sign-on support. Disaster recovery and full data encryption.

**Reference and analyze historical data** Maintain history of territory definitions, assignment rules, and quotas through effective dating, versions, and audit tracking.

### Anaplan for Sales end-to-end solution integration

Upstream integration with Anaplan’s Account Segmentation app to leverage account segments and scoring when defining, optimizing, and communicating sales territories and quotas. Downstream integration with Anaplan’s Sales Capacity and Sales Incentive Compensation Planning apps for a comprehensive end-to-end solution.



#### 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](https://anaplan.com).