



Use Case

Sales Planning

Challenge

- Current spreadsheet-based planning was time-intensive and cumbersome
- Needed to increase organizational productivity
- Required an easy-to-use interface for sales modelling and planning
- Enable distribution of more effective, online, and user-friendly dashboards

Solution

- Replaced multiple spreadsheets with one Anaplan application
- Real-time, global collaboration
- Consolidated, consistent bottoms-up input to the plan
- User-friendly, secure, cloud-based system

Results at a Glance

- Direct data access by owners ensures accuracy
- Reduced complexity and enhanced visibility into the planning process
- Easier to manage sales territory and region changes and reallocation of business lines
- Ability to create different versions of data and compare scenarios in real-time



StepStone Enables Effective Sales Forecasting Through Improved Sales Target Setting, Territory Alignment with Anaplan

Introduction

StepStone Group is Europe's leading job boards provider, with job listings in 20 countries. StepStone operates some of the most popular European online job portals with over 37 million visits and more than 330,000 jobs per month. A Norwegian company that was started in 1996, StepStone Group was acquired in 2009 by Axel Springer, a German media group.

With offices in 20 countries, StepStone tracks a significant amount of data on the recruitment market, including job candidate actions and their competitors' job postings activities in addition to their own customers' data. Efficiently analyzing this large volume of data is a key business advantage.

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Before Anaplan

Prior to Anaplan, StepStone relied on Excel spreadsheets for all of their sales planning, sending them around via email to collaborate amongst hundreds of employees. As the amount of data they incorporated into their planning increased over time, the Excel sheets became too big to manage through this manual process. Additionally, there were concerns around emailing around sensitive data, such as salaries and customer lists that you wouldn't want to be accidentally shared with an unintended recipient.

“We were using Excel, like a lot of companies,” said Jan Heiremans, COO, StepStone Group. “The biggest issues that we had, besides the size of the files, was the fact that you cannot easily work collaboratively while maintaining control of sensitive data. By using Anaplan you can be cooperative with different people, each with access to only their own part of the system.”

Another issue was quantity of data. StepStone's sales planning process involves market data of up to 400,000 companies per country, which was nearly impossible to calculate in Excel. “It would take at least five minutes to make any one calculation,” said Heiremans.

Selection Process

Although StepStone had clearly outgrown their spreadsheet-based business planning process, they weren't actively looking for a solution when they saw a demo of Anaplan at an industry event.

“It was just love at first sight,” said Heiremans. “We were at a technology conference in London and one of the sponsors was Anaplan. We saw the product in action and said ‘that's what we need!’”

Implementation and Deployment

StepStone found the implementation process to be quick and efficient, with little ramp-up time required for their spreadsheet-savvy team. And they were impressed that the Anaplan team was able to build the initial model in just two weeks.

“If you know Excel, you know Anaplan,” said Heiremans. “That's at least how it felt to us. We didn't need to have a lot of training on it. It was not like implementing a huge system, like a new ERP. It was so easy. As was the proof of concept where we said okay, here are our spreadsheets that we use today and literally a few days later, they came back to us with a prototype.”

StepStone's initial deployments have focused on sales representatives' target setting, distribution of existing customers across the sales territories, and sales performance analytics. They've additionally started using Anaplan to track how many jobs they are posting in StepStone properties versus those listings posted by their competition, to determine true market potential. This data is then aggregated, de-duped, and turned into market potential by sales person and territory.



“Our objective is that we are able to drill down into results for each sales person,” said Heiremans. “We benchmark them against their peer group, including number of deals, number of discounts. Then we can say: here’s your result, but if you increase your closing rate then your whole result becomes higher.”

Benefits

“Wherever you use Excel templates in the business today, why not use Anaplan?” said Heiremans. “Especially where you have to share data. Multiple people can work on it at the same time, unlike in Excel where you end up with multiple versions. I can see a future where anywhere we use Excel today, with shared data, there will be no need to use Excel anymore. Unlike spreadsheets, where you’re sending around emails with Excel files or putting it on a shared drive where somebody else is working on it and then nobody else can work on it, or you have file version control issues, Anaplan is collaborative by its nature. That’s going to solve lot of problems.”

Heiremans also notes that with Anaplan, every quarter they have a new forecast version that they can compare with previous portfolios, and their performance, over time. A static view of a report from their CRM, by comparison, only shows them their current portfolio.

“Anaplan allows us to set more accurate targets, that are achievable, that we could not have done in the past,” said Heiremans. “The benefit is that we have become better at our job, and that has allowed the company to operate better.”

What’s Next?

StepStone has a weekly forecast call that traditionally has been a labor-intensive spreadsheet consolidation exercise. They are currently building this process into Anaplan, integrating real-time data from their CRM, to abolish their spreadsheet drill.

As they roll out Anaplan to new regions and users, they continue to uncover a number of possible new use cases.

“For instance, how can we use it for the whole candidate data set?” said Heiremans. “We have thousands of listings with millions of candidates applying. Maybe if we start digging into that area...who knows what we’d find out.”

About Us

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