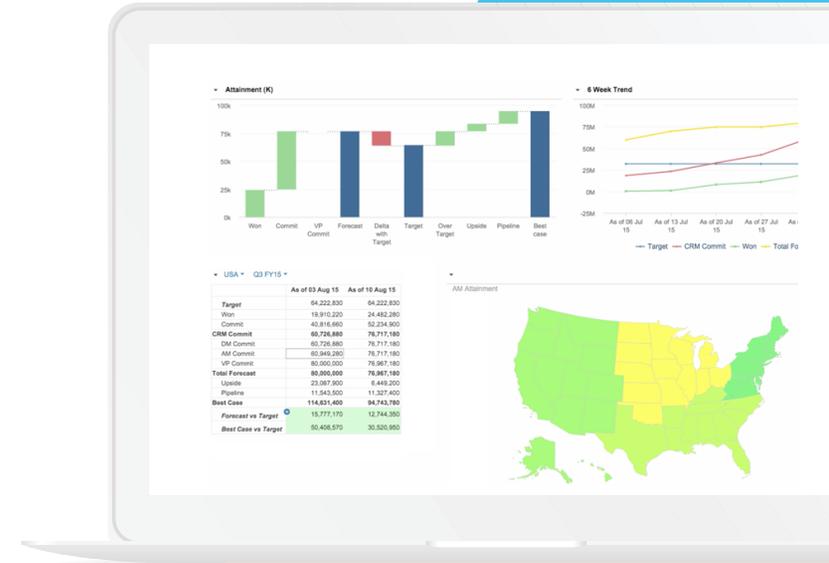




Sales Forecasting

Anaplan for Sales Forecasting gives sales executives, leaders, and representatives the flexibility to manage an accurate and trusted sales forecast in any area of the business. Analyze forecasts at the geographic, opportunity, and product levels to understand the health of your sales organization. With the ability for sales leaders to collaborate week-over-week with their sales teams, the entire sales organization is held accountable to commit the numbers honestly—no more “sand baggers” or over-commits. Get precise insight into sales actuals and expected pipeline.



Standardizes sales forecasting and pipeline management across the entire organization and global geographies. Ensure that everyone in every department across the organization around the globe are all maintaining revenue projections and sales forecast using a standard methodology and process.

Provides an accurate and trusted sales forecast across the entire organization. Build trust and confidence with Sales, Finance, Operations, HR, and Marketing, allowing them to make better, more informed business decisions based on a sales forecast that is accurate and trusted among everyone.

Enables sales managers to improve sales performance with the sales team and individual sales reps. Provide week-over-week insight to the sales forecast and sales pipeline with sales rep accountability. Sales managers have complete visibility of what has changed in this week’s sales forecast over last week’s, allowing them to access pipeline risk.

KEY BENEFITS

- Provides an accurate and trusted sales forecast (weekly, monthly, quarterly, annually)
- Focuses the sales team on high-revenue, high-profit sales pipeline opportunities, resulting in improved win rates
- Enables improved decision-making based on a data-driven sales forecast and actionable insights
- Helps develop a sales forecast benchmark from historical sales performance, trends, and seasonality
- Reduces sales pipeline and forecast risks while aligning with sales quotas and revenue expectations
- Reduce cycle times and time spent planning territory coverage and setting quota assignments



Using Anaplan, Lexmark was able to align Sales and Finance to an accurate and trusted sales forecast after acquiring 12 companies, which all had different IT environments and processes, no standardization of sales forecasts across four regions, and 800 front line managers who were forecasting on 3,000 product numbers.

Benefits

- Forecasting data based on Salesforce opportunities and account data with Big Machines pricing and quoting data
- Better alignment with Sales, Finance, and Operations with reliable monthly sales forecasts
- Sales forecast calls focused on outliers and changes instead of data consistency
- Went from concept to deployment in nine months

Key Features

Maintain an accurate and trusted sales forecast week-over-week Meet with the sales team to review sales opportunities that are included in the week-over-week sales forecast and increase sales rep accountability while eliminating “sand-baggers” and over-commits. Sustain an accurate and up-to-date forecast in one place.

Execute sales forecast simulations and outcomes Make changes to drivers and execute sales forecast simulations to project future impact on sales performance.

Analyze trends, changes, and seasonality of the sales forecast over time Develop time-based dashboards and key performance indicators (KPIs), such as velocity calculations, trending analytics, and seasonality fluctuations.

“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.

Build sales forecasting calculations with familiar formulas Apply easy-to-use formula builder to configure sales forecast benchmark, all using familiar Excel®-like formulas and syntax.

Snapshot Salesforce CRM accounts and opportunities to compare period-over-period Create snapshots of Salesforce CRM accounts and opportunities and compare week-over-week, month-over-month, and year-over-year changes to current periods.

Compare forecasts based on multiple modeling techniques Create sales forecasts based on qualitative, time series analysis and projection, and casual modeling techniques, while determining the degree of uncertainty with the sales forecast accuracy and predictability.

Forecast across geo, products, and accounts Develop sales forecasts by geographic locations, product lines, and accounts, or change any of these dimensions to analyze the sales forecast at any granularity of these hierarchies (e.g., by state/city, a specific set of product SKUs, or a group of accounts in a selected vertical).

Predict future business results Use predictive analytics, such as linear regression, to help determine future business outcomes of the sales forecast.

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 sales forecast in sales meetings.

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

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 sales forecast through effective dating, versions, and audit tracking.



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.