Revenue performance management for medical devices

Anaplan

An integrated suite of solutions for end-to-end commercial planning and forecasting

Revenue growth in the medical device sector demands more than disconnected spreadsheets and siloed data. Today's commercial operations leaders need a unified, intelligent approach to navigate complex hospital networks, allocate field capacity, define territories across diverse care settings, and forecast revenue with confidence. Anaplan's revenue performance management (RPM) solutions deliver exactly that — a connected set of purpose-built applications that takes commercial planning from strategy to execution, all in one AI-driven platform.

From identifying highest-potential integrated delivery networks (IDNs), health systems, and providers to optimizing field coverage, setting equitable quotas, and generating a single trusted forecast across capital equipment, consumables, and service contracts, Anaplan for Revenue Performance Management gives commercial operations, finance, supply chain, and executive teams the AI-driven insight and agility to outpace the competition.

There's a better way to plan

Most MedTech enterprises manage their commercial motion across fragmented systems: market and claims data in one tool, headcount planning in another, quotas in spreadsheets, and product forecasts buried in email threads. The result is inconsistent data, slow planning cycles, misaligned supply chains, and a chronic lack of confidence in the numbers.

Anaplan's revenue performance management solutions connect every stage of the revenue planning lifecycle — from provider segmentation and territory design through sales forecasting and supply planning — in a single cloud-native platform. When assumptions change in one area, downstream plans update automatically, giving your organization a real-time view of revenue performance, field capacity, and product demand.

CUSTOMER STORY

Penumbra

As a rapidly growing medical device manufacturer, Penumbra needed a more scalable approach to planning across revenue forecasting, demand planning, and workforce planning. Legacy processes limited visibility, slowed decision-making, and made it difficult to keep pace with growth. By implementing Anaplan, Penumbra connected commercial, demand and workforce planning processes to improve forecast accuracy, increase agility, and support the delivery of life-saving products worldwide.

- 2–3 days saved planning every month through real-time access to data
- Improved predictive accuracy to support more confident planning and investor communications
- 6–9 months of workforce planning visibility by connecting recruiting and HR data to operational plans

"With Anaplan we have the flexibility to build something that reflects our business to a T."

Alex Reeves
Senior Director, Corporate Strategy & Finance, Penumbra

Key benefits

- **Holistic market intelligence:** Analyze historical, forecasted, and predictive market performance, procedure volumes, and facility potential in one unified view.
- **Optimized field coverage:** Align headcount and clinical resources with market demand to maximize coverage, eliminate gaps, and drive device adoption.
- **Motivating quotas and territories:** Build equitable, data-driven territory and quota plans that increase rep productivity and reduce attrition.
- **AI-driven forecasting:** Generate a single, defensible, AI-driven forecast that seamlessly links commercial sales to finance, S&OP, and supply chain planning.
- **Real-time adaptability:** Model scenarios instantly and adapt plans in response to regulatory shifts, budget changes, or supply disruptions with complete auditability.
- **Integrated enterprise-wide planning:** Break down silos between commercial, finance, HR, and supply chain teams, ensuring the right products are available to meet customer demand.

Key features and capabilities

Anaplan's revenue performance management solutions are composed of four flagship applications, each purpose-built to address a critical stage of the commercial planning lifecycle. Together they form a seamless, connected motion from market strategy through to in-year execution.

1. Segmentation and scoring

Establishes a repeatable, data-driven foundation for market sizing and provider prioritization to ensure commercial teams target the highest-potential healthcare opportunities.

- **Market analysis and tiering:** Analyze market performance using first-party and third-party signals, such as procedure volumes and diagnostic codes. Define regional tiers based on maturity and hospital buying behaviors.
- **Wallet sizing:** Identify serviceable obtainable market and remaining wallet share within specific health systems to drive strategies for new market entry, capital expansion, and product launches.
- **Ideal provider profile definition:** Set exclusionary criteria to eliminate data noise and focus segmentation on facilities and physicians that truly fit your target profile.
- **Rules- and scoring-based segmentation:** Flexibly segment accounts using rule-based logic or configurable attributes to prioritize hospitals, clinics, or individual practitioners.
- **Commercial customer profiles:** Create multiple profiles that define your target buyers, driving coordinated strategies across capital sales, clinical specialists, medical science liaisons, and marketing.
- **Account hierarchy management:** Manage complex account roll-ups from individual physicians to clinics, hospitals, parent IDNs, or group purchasing organizations at whatever level of granularity your business requires.

2. Go-to-market (GTM) capacity planning

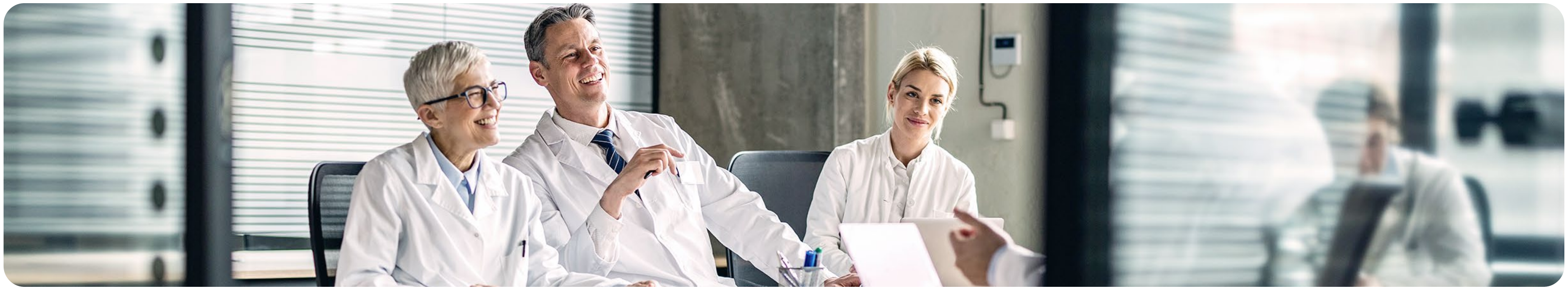
Delivers a unified, real-time view of headcount capacity and performance to model scenarios, optimize resource allocation, and close coverage gaps in the field.

- **Current full-time equivalent (FTE) reporting:** Gain real-time visibility into headcount and FTE data across key account managers, field reps, and clinical support. Simulate what-if ramp scenarios to optimize staffing.
- **Coverage and headcount gap analysis:** Recommend and balance headcount allocation across territories. Identify gaps in clinical coverage and adjust assumptions in real time while planning for future hires.
- **Top-down and bottom-up planning:** Distribute headcount targets across sales hierarchies. Track hiring, attrition, and productivity trends to drive data-backed staffing decisions in competitive MedTech talent markets.
- **Role-based performance review:** Analyze performance by configurable dimensions such as therapeutic area, product line, and tenure. Surface actionable insights to enhance field effectiveness.
- **Sales margin planning:** Capture and aggregate role-specific cost data to identify profitability drivers and model dynamic margins that account for the differing economics of capital equipment versus high-volume consumables.
- **In-year actual versus planning:** Lock plans to maintain data integrity, reopen for real-time adjustments, and compare snapshots to continuously optimize clinical and sales coverage throughout the year.

3. Territory and quota planning

Creates balanced territories and motivating, financially-aligned quotas by connecting segmentation and capacity data to drive predictable revenue.

- **Territory design and modeling:** Design and model potential territory structures across multiple dimensions, geography, therapeutic area, product division, or named IDN, based on total addressable market, procedure data, and predictive insights.
- **Fair and balanced quota setting:** Drive quota plans using simultaneous top-down and bottom-up methodologies. Develop targets by revenue, margin, placement volume, or product mix.
- **Account prioritization and scoring:** Segment and categorize hospitals to prioritize those with the highest propensity to buy or upgrade. Blend quantitative data with experiential field knowledge.
- **Ramp and transfer management:** Manage prorated quotas for new hires and easily reallocate targets when reps transfer or go on leave, which is critical for maintaining uninterrupted provider relationships.
- **Predictive insights and buyer intent:** Model using historical data combined with external intelligence: health system growth trends, facility expansions, and institutional buying signals.
- **CRM integration and auditability:** Seamlessly push territory changes and quota assignments to Veeva, Salesforce Health Cloud, or incentive compensation platforms, maintaining full auditability.



4. Sales forecasting

Unifies pipeline management, deal reviews, and strategic plans into a single, AI-enriched enterprise forecast that drives confident executive and supply chain decisions.

- **Strategic account planning:** Turn territory and quota assignments into proactive account plans that prioritize high-value activities within major health systems, uncovering whitespace for new device lines.
- **Unified commercial forecasting:** Roll up forecast submissions — tailored to capital sales, recurring consumables, and service contracts — for a fast, consistent, and accurate single source of truth.
- **Pipeline and opportunity management:** Get a live, interactive view of your entire pipeline. Track momentum through complex hospital value analysis committee approvals and purchasing cycles.
- **Time-based forecasting:** Generate a more accurate, unbiased AI-driven forecast. Surface the key drivers and benchmarks that influence your numbers for greater confidence in every commit.
- **Dynamic scenario planning:** Instantly model any what-if scenario — from delayed hospital budget cycles to broad supply chain shifts — to understand the full revenue impact before committing.
- **Integrated enterprise-wide forecasting:** Link commercial forecasts directly to supply chain, inventory, and S&OP teams, so products are manufactured, positioned, and distributed in alignment with customer demand.

The Anaplan platform offers

- **Rapid deployment** of best practices, configurable to customer requirements, upgradeable with future release, and extensible to other use cases through standard Anaplan platform capabilities.
- **Dashboards, reports, and analytics** with data visualization to provide a single source of planning truth on workforce and business data and performance.
- **"What-if" scenario and multi-dimensional modeling** powered by our high-performance calculation engine, producing ultra-fast calculations at an unprecedented scale.
- **Collaborative and agile planning** across the enterprise from corporate to business units and across functions and operations (HR, finance, sales and marketing, supply chain).
- **Best-in-class security and data privacy** with role-based access control, user management, SSO support with SAML 2.0 compliance, and data encryption.
- **A highly extensible ecosystem** to collect, analyze, and plan in a single location using APIs, ETL connectors, and built-in integrations with HCM/HR, finance, operations, other systems of record, and data warehouses.

About Anaplan

Anaplan is a leading AI-driven scenario planning and analysis platform designed to optimize decision-making in today's complex business environment so that enterprises can outpace their competition and the market. By building connections and collaboration across organizational silos, our platform intelligently surfaces key insights — so businesses can make the right decisions, right now.

More than 2,600 global brands plan with Anaplan.

To learn more, visit www.anaplan.com

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