Revenue performance management for technology companies

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

Revenue growth demands more than disconnected spreadsheets and siloed data. Today's go-to-market (GTM) leaders need a unified, intelligent approach to plan markets, allocate capacity, define territories and quotas, and forecast revenue with confidence. Anaplan's revenue performance management (RPM) solutions deliver exactly that — a connected set of purpose-built applications that takes sales planning from strategy to execution, all in one AI-driven platform.

From identifying your highest-value markets and accounts, to right-sizing your sales team, setting motivating quotas, and generating a single trusted forecast, Anaplan for Revenue Performance Management gives every stakeholder (sellers, operations, finance, and the C-suite) the AI-driven insight and agility to outpace the competition.

There's a better way to plan

Most enterprises manage their GTM motion across fragmented systems: market data in one tool, headcount planning in another, quotas in spreadsheets, and forecasts buried in email threads. The result is inconsistent data, slow planning cycles, missed targets, and a chronic lack of confidence in the numbers.

Anaplan eliminates these silos by connecting every stage of the revenue planning lifecycle — from market segmentation to forecasting — in a single cloud-native platform. When one plan updates, all downstream plans update automatically, giving your organization a living, connected view of revenue performance.

CUSTOMER STORY

AUTODESK

To support its transition to subscription licensing, Autodesk leveraged Anaplan to unify its complex, multibillion-dollar finance and revenue operations. This helped them perform faster and more accurate sales forecasting with an enterprise-wide planning environment.

- 80% faster revenue forecast roll-up
- Expense forecast variance shrank from a $1 million range to just $30,000
- Rapid recalibration of company-wide financial plans without business disruption

> **With Anaplan Optimizer, yearly changes to the go-to-market strategy can be implemented easily."**

Damian O'Farrill
Director of Data Science and Revenue Analytics, Autodesk

Key benefits

- **Holistic market intelligence:** Analyze historical, forecasted, and predictive market performance and account potential in one unified view.
- **Optimized sales coverage:** Align headcount and resources with market demand to maximize coverage, eliminate gaps, and drive revenue.
- **Motivating quotas and territories:** Build equitable, data-driven territory and quota plans that increase seller productivity and reduce attrition.
- **AI-driven forecasting:** Generate a single, defensible, AI-driven forecast that links sales to finance, supply chain, and workforce planning.
- **Real-time adaptability:** Model scenarios instantly and adapt plans in response to market shifts, attrition, or deal changes with complete auditability.
- **Integrated enterprise-wide planning:** Break down silos between sales, finance, HR, and operations with collaborative planning that drives better decisions, faster.

Key features and capabilities

Anaplan revenue management performance solutions are composed of four flagship applications, each purpose-built to address a critical stage of the revenue 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 account prioritization to ensure GTM teams target the highest potential opportunities.

- **Market analysis and country tiering:** Analyze historical and forecasted market performance using first-party, third-party, and customer signals. Define country tiers based on maturity, growth potential, and buying behaviors.
- **Wallet sizing:** Identify serviceable obtainable market and remaining wallet share to drive strategies for new market entry, expansion, product launches, and M&A.
- **Ideal customer profile definition:** Set exclusionary criteria to eliminate data noise and focus segmentation and scoring on accounts that truly fit your target
- **Rules- and scoring-based segmentation:** Flexibly segment accounts using rule-based logic or configurable top-down and bottom-up scoring attributes to assign and prioritize accounts in any given segment.
- **GTM customer profiles:** Create multiple profiles that define and segment your customer base to drive GTM strategies across sales, customer success, partners, and marketing
- **Account hierarchy management:** Manage account roll-ups to parent accounts, flat hierarchies, or by exception — no matter the level of granularity your business requires.

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

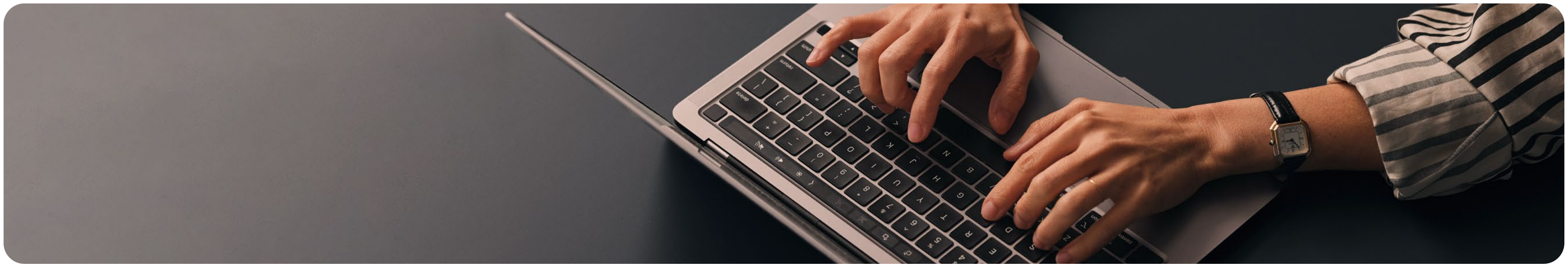
Delivers a unified, real-time view of headcount capacity and performance to model scenarios, optimize resource allocation, and close coverage gaps.

- **Current full-time equivalent (FTE) reporting:** Gain real-time visibility into headcount and FTE data by role, hierarchy, and time. Simulate what-if ramp scenarios and access employee-level insights to optimize staffing decisions.
- **Coverage and headcount gap analysis:** Recommend and balance headcount allocation across sales and support resources. Identify gaps and adjust coverage assumptions in real time while planning for future hires.
- **Top-down and bottom-up planning:** Distribute headcount targets across hierarchies, apply constraints, and simulate scenarios. Track hiring, attrition, and productivity trends to drive data-backed staffing decisions.
- **Role-based performance review:** Analyze performance by configurable dimensions such as segment, industry, and tenure. Surface actionable insights to enhance role effectiveness and sharpen planning strategies.
- **Sales margin planning:** Capture and aggregate role-specific cost data to identify profitability drivers and model dynamic margins that account for productivity and seasonality all within budget.
- **In-year actual versus planning:** Lock plans to maintain data integrity, reopen for real-time adjustments, and compare snapshots to analyze gaps and continuously optimize 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, industry, product, division, or named account — based on total addressable market, pipeline, and predictive insights.
- **Fair and balanced quota setting:** Drive quota plans using simultaneous top-down and bottom-up methodologies. Develop targets by revenue, margin, growth, volume, or any other objective measure.
- **Account prioritization and scoring:** Segment and categorize prospects to prioritize accounts with the highest propensity to buy. Blend quantitative data with experiential sales knowledge for richer account scores.
- **Ramp and transfer management:** Manage prorated quotas for new hires and easily reallocate targets when salespeople terminate, transfer, or go on leave with complete auditability.
- **Predictive insights and buyer intent:** Model using historical data combined with AI-driven external intelligence to understand company growth trends, technographics, hiring signals, and buyer propensity insights.
- **CRM integration and auditability:** Seamlessly push territory changes and quota assignments to CRM systems and incentive compensation platforms, maintaining date-effectivity and a full audit trail.



4. Sales forecasting

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

- **Strategic account planning:** Turn territory and quota assignments into proactive, actionable account plans that prioritize high-value selling activities and close coverage gaps with whitespace and greenfield insights.
- **Unified GTM forecasting:** Roll up forecast submissions — tailored to each GTM team and revenue model — for a fast, consistent, and accurate single source of truth that the whole organization can trust.
- **Pipeline and opportunity management:** Get a live, interactive view of your entire pipeline. Track deal momentum, identify opportunity risk, and conduct more effective, data-driven deal reviews.
- **Time-based forecasting:** Generate a more accurate, unbiased AI-driven time-series 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 individual deal changes to broad market shifts — to understand the full revenue impact before committing to a path forward.
- **Integrated enterprise-wide forecasting:** Link your sales forecast to enterprise-wide plans and provide a trusted number to finance, supply chain, and workforce teams, which eliminates downstream planning errors.

The Anaplan platform offers

- **Rapid deployment** of best practices, configurable to customer requirements, upgradable with future releases, 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.