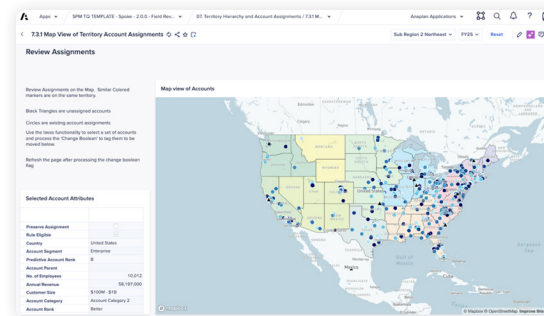


Territory and Quota Planning application with Anaplan Sales Analyst



Answer questions and plan faster with real-time traceable insights from Anaplan Sales Analyst — your AI agent

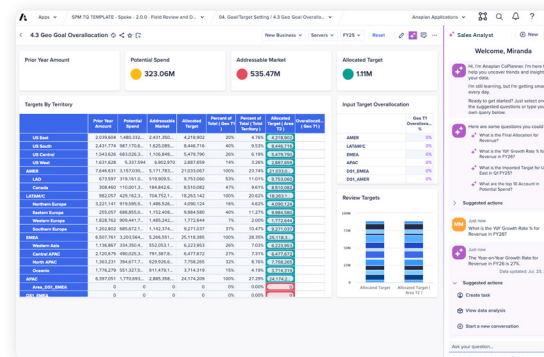
In fast-changing and competitive markets, revenue leaders must forecast their way to target when manual territory and quota planning processes and disconnected data fail to deliver. Every day your go-to-market (GTM) teams don't have their plan is a lost selling day. Inequitable territories and unmotivating quotas result in plummeting productivity, costly attrition, and missed growth opportunities.



There's a better, faster way to plan

Introducing a purpose-built composable application **embedded with proven best practices** to drive revenue performance management and streamline GTM planning.

The **Anaplan Territory and Quota Planning application** intelligently helps organizations focus GTM capacity on segments and accounts with the highest potential and reconcile predictive top-down revenue targets with bottom-up account potential. Relying on both balanced, equitable territories and justifiable, motivating quotas aligned to your GTM strategy, you can boost productivity, improve efficiency, and maximize revenue.



Key benefits

- Accelerate planning cycles with proven processes, dynamic workflows, and embedded intelligence.
- Increase agility to guide smarter decisions by modeling dynamic "what-if" scenarios.
- Drive cross-functional alignment and trust by connecting all data and stakeholders on a single platform.
- Maximize revenue and productivity by focusing GTM teams on the highest-potential accounts.
- Boost performance with precise, fair, and motivating plans aligned to GTM and corporate strategy.
- Leverage the **Anaplan Sales Analyst — your AI agent for smarter GTM planning** — directly from the application to get traceable answers to your questions, accelerate planning, and drive appropriate actions.

Key features

Stay ahead of the market and the competition, with integrated revenue performance management.

The Anaplan Territory and Quota Planning application allows you to:

Align your GTM and financial plans

Design, deploy, and adapt more effective territories and quotas with critical inputs from the Anaplan Segmentation and Scoring application, Anaplan GTM Capacity Planning application, and Anaplan Integrated Financial Planning application.

Set and allocate targets with confidence

Input top-down targets based on predictive revenue targets, allocate down the territory hierarchy, and layer in bottom-up quotas from account data. Lock plans with dynamic approvals and finalize with ease.

Simplify account-to-territory assignment

Assign millions of accounts by rules and manual selection, apply geo logic, balance workloads with scenario modeling, and quickly reassign as strategy evolves.

Optimize territories intelligently

Define territory balancing constraints, run multi-scenario comparisons, and refine your plans with human-in-the-loop feedback.

Plan with agility using “what-if” scenarios

Model growth paths, filter by role, segment, or product, and build driver-based plans to compare scenarios and guide decisions.

Assign the right reps with precision

Align direct sellers, overlays, and managers using role-based logic, support temporary coverage and strategic programs, and track changes over time. Easily manage employee transitions and fill open territories fast.

Assign quotas tied to GTM strategy

Distribute quotas by role, product line, and quota measure, apply ramping and seasonality, and configure across multiple dimensions. Review, approve, and analyze top-down vs. bottom-up alignment.

Streamline dynamic approvals and signoff

Coordinate dynamic top-down and bottom-up approval flows with visibility for GTM leaders and frontline teams.

Plan smarter with AI agents

Rely on Anaplan Sales Analyst to answer ad hoc questions and accelerate planning processes with real-time, context-aware, traceable insights with conversational AI. Drive action with tasks to validate data, adjust plans, run scenarios, and capture approvals — all from a single interface.

CUSTOMER STORY



GLOBAL SALES ORGANIZATION

Optimize territory and quota planning to boost revenue and productivity

A global sales organization with a complex GTM model needed to modernize its territory and quota planning process to support aggressive growth goals and enable faster execution.

The company sought to:

- Replace a manually intensive, spreadsheet-driven territory and quota process
- Improve flexibility for handling parent-child account relationships
- Accelerate quota distribution to the field
- Increase visibility and control to reduce inefficiencies

With the Anaplan Territory and Quota Planning application, the company was able to:

- Deliver quotas to the field in the first week of the fiscal year — cutting 60 days from prior timelines
- Reduce operational costs by 30% through process automation
- Introduce new operational daily reports to proactively identify unassigned accounts and under-allocated territories
- Eliminate Excel-based approval routing, reducing manual errors and improving collaboration

Key features of the Anaplan platform

Application framework: Rapidly deployable best practices, configurable to customer requirement, upgradeable with future release, and extensible to other use cases through standard Anaplan platform capabilities.

Dashboards, reports, and analytics with data visualization 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 unprecedented scale.

Engage AI agents through natural language interactions to answer questions faster with traceability, accelerate planning processes, initiate workflows, and drive action.

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 — collect, analyze, and plan in a single location using APIs, ETL connectors, and built-in integrations with CRM, HCM, finance, operations, other systems of record, and data warehouses.



About Anaplan

Anaplan is the only 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 2,500 of the world's best brands continually optimize their decision-making by planning with Anaplan.

To learn more, visit www.anaplan.com

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