



Use Cases

Sales Forecasting
Quota Management
Performance Dashboards

Challenge

- Data feeds from disparate systems
- Complex forecasting and quota process driven by disconnected Excel spreadsheets and Salesforce.com

Solution

- Implemented Sales Forecast 360 which replaced spreadsheets and databases with single data model on the Anaplan enterprise performance cloud
- Anaplan Connect: ETL tool to load data from external systems

Results at a Glance

- Simplified and accurate sales forecasting
- Replaced spreadsheets and integrated disparate data
- Team collaboration with 100% business self-service where users, not IT or consultants, manage development



Jive's CFO maintains pulse on sales performance with Anaplan

Introduction

Jive Software (Nasdaq:JIVE) is a leading global social business company. The Palo Alto-based business brings social technology innovations from the consumer world into enterprises securely and at scale, changing the way work gets done. Jive's integrated social platform combines the power of big data, enterprise integrations, and social collaboration technologies to provide a unified solution to millions of people at the world's largest companies to transform their businesses.

The Issues

Jive secured its status as the fastest growing social business company in the industry by doubling the size of its workforce since 2008 and increasing full year revenue 85% from 2008 to 2009. Throughout this period of rapid growth and expansion, Jive relied on a variety of technologies to handle their sales forecasting process. But, with the very structure of the business changing almost daily, Jive's idiosyncratic system has struggled to keep up.



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"Everything was disjointed," says Senior Financial Analyst Scott Kempton. "We were doing quota management in Excel, bookings and sales in Salesforce, and pipeline analysis in Cloud9 Analytics, so we could never get all the information into one central system." Jive's multi-tool approach was the source of several issues: The executive team had poor visibility into the sales opportunity pipeline, all data updates involved a tedious and cumbersome transfer process from salesforce.com to Excel pivot tables, and, when changes of any kind needed to be made, "You just crossed your fingers and hoped that the system wouldn't break," says Kempton.

Eager to stay on top of Jive's rapid growth and get a stronger handle on the pipeline, CFO Brian LeBlanc tasked Kempton with finding a comprehensive system that could manage daily change reliably, increase visibility, and facilitate a better conversation between the sales team, VPs, and executives.

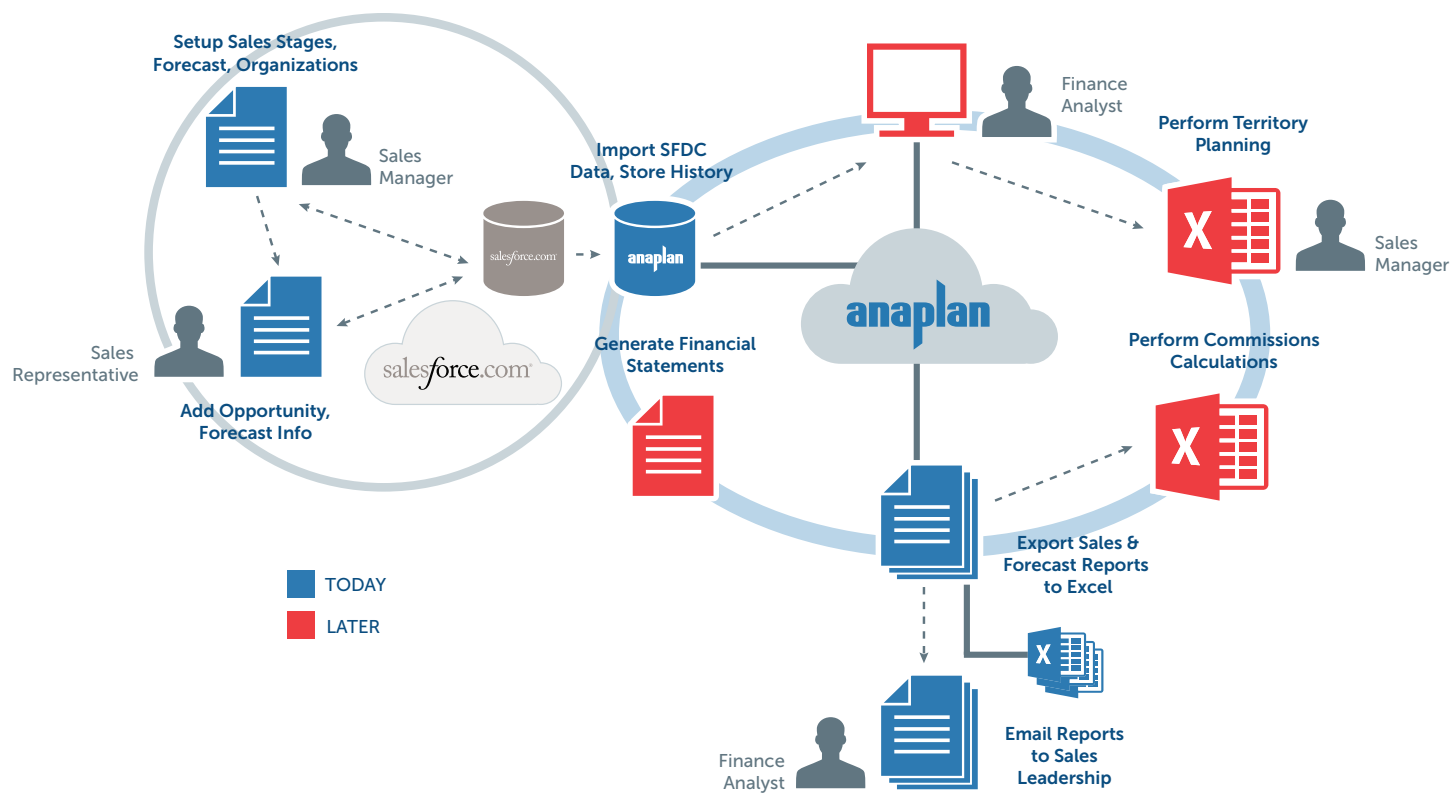
The Solution

As soon as Kempton got a good look at Anaplan, the choice was obvious. The fact that the Anaplan platform delivers its Sales Forecast 360 application as cloud-based offering made the decision to implement Anaplan a no-brainer. New companies are up and running with Anaplan in a matter of hours, and fully operational in days – all without the help of IT. Jive Software was no exception.

Having invested years of time and effort into Excel, Kempton also wanted a tool that was familiar like a spreadsheet — something that would provide immediate value without demanding that he master a new scripting language or interface. "The great thing about Anaplan is that anybody using Excel can easily get started right away and customize their own views the way they want to," says Kempton.

"But Anaplan goes above and beyond Excel, enabling me to rely on the information instead of worrying about the fact that data is missing or pivot tables aren't refreshing."

Very quickly, sales forecasting at Jive changed from a time-sucking process of data chasing, formula checking, and manual roll-ups into a timely conversation about the numbers with all the sales team's data and people in one place. Kempton adds, "Anaplan brought together multiple systems that were really limited. We moved the management and administration of those systems onto Anaplan and now we can trust that the data is right."



The Results

Within days, members at every level had noticed immediate results. Anaplan facilitated a better, richer conversation at Jive, giving them the confidence and reliability they'd been searching for. "It really helps us speed up the process, cut through the crap, and just get into the detail to understand which deals we need to win in order to make the quarterly goal," says Kempton. Now, instead of bickering about what the number is, Jive employees spend their time discussing how to get there.

The CFO

Previously, "the CFO didn't have the visibility he needed into the sales forecasting process pipeline," says Kempton, "It was hard to see how the numbers rolled up." Anaplan gave CFO Brian LeBlanc total visibility into the sales forecasting process, allowing him to talk with the sales VPs and other executives about the current pipeline and understand how they were going to achieve quarterly goals.

The Team

Kempton states, "We do 30% of our business in the last week of the quarter. With Anaplan, we're able to update models quickly, present a view of the high level to the executives, and drill down into more of the detail to understand the path to the number. It's just been vital."



Expanding Across the Enterprise

Moving forward, Jive is looking to expand the reach of Anaplan into their Professional Services team with the capacity planning suite.

“Capacity is the biggest thing for us right now” says Kempton. “We need to understand what our potential booking or sales are for the year, because everything that sales sells, professional services needs to deliver. Being able to go in and see if they’ve got enough capacity is vital. We’ll be implementing the capacity model for the Professional Services team based on our sales forecast, which will allow us to accurately forecast and manage our resources. It’s going to be great.”

As Jive continues to grow and thrive in the months to come, Anaplan will share its solution map with the company, showing other areas across the business that can be connected to the sales and capacity models they already have. Down the road, it will be possible for Jive to model, analyze, plan, and forecast their entire business on the Anaplan platform, bringing the people, data, and processes of Jive together on the same page.

About Anaplan

Anaplan is disrupting the world of business planning and execution. We built our platform from the ground up to empower companies to plan, collaborate and act—in real time. Stay ahead of critical business events, rapidly model potential impacts and course correct on the fly. With Anaplan’s cloud-based platform, you can continuously align your people, plans and spend to your market opportunities. Anaplan is a privately held company, headquartered in San Francisco, CA with global offices on four continents. To learn more, visit anaplan.com. Join us on twitter: @anaplan