Anaplan

intel® Security

Use Cases

Quota Management
Sales Compensation Management

Challenge

- Complex quota and sales compensation management processes driven by disconnected Excel™ spreadsheets and more than 40 databases

- Difficulty consolidating, reviewing and approving commission related data in a timely manner

Solution

- Replaced spreadsheets and databases with single data model on the Anaplan cloud platform

- Self service - Finance team and Anaplan solution architect designed, built and tested model in a few weeks without IT support

- Global collaboration - different countries working on the same data model at the same time with instant updates to model

Results at a Glance

- 400% ROI measured in months on cash basis

- Replacement of enterprise spreadsheets and 40 databases

- Real-time updates to model eliminating consolidation process

- High adoption rate by team
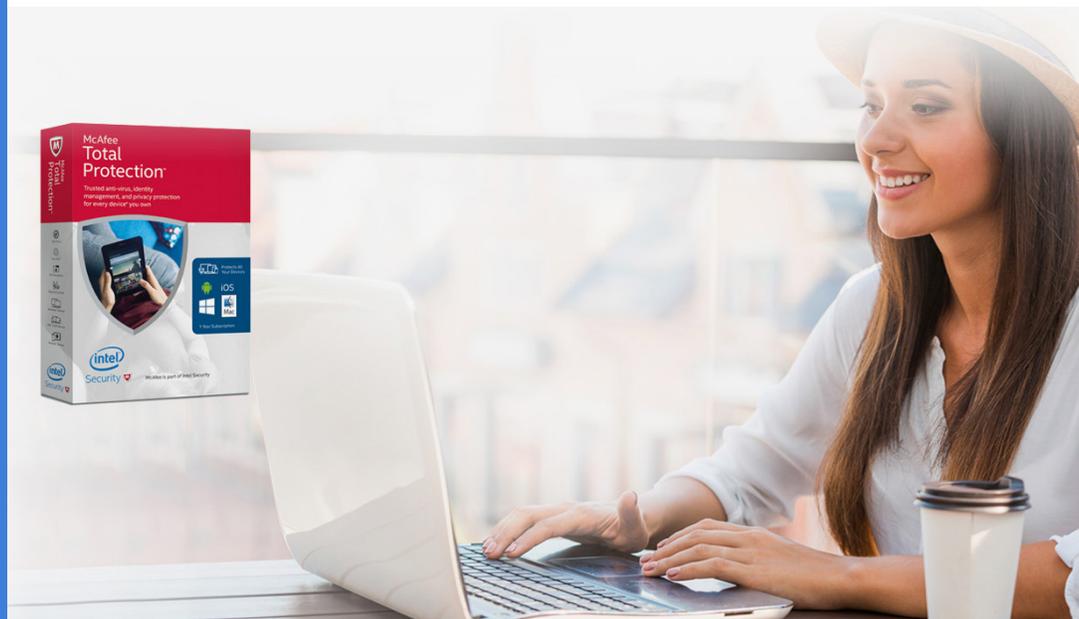
Intel Security transforms its **quota management and sales compensation management** with Anaplan in the cloud

Introduction

Intel Security Group is an American global computer security software company and the world's largest dedicated security technology company. It helps secure systems, networks, and mobile devices around the world, allowing users to safely connect to the Internet, browse, and shop on the web more securely. It has all of the complexity to be expected of a modern multinational organization with approximately half of its revenues in North America and the remainder spread throughout the world in more than 130 countries.

As with many technology companies, people are one of Intel Security's principal assets. The company relies on its 6,595 employees to create innovative products that help its customers prove compliance with regulations, protect data, prevent disruptions, identify vulnerabilities, and continuously monitor and improve their security.

"
One of the biggest surprises of the project was my team's adoption rate, i.e. just how easily they took to the Anaplan solution. **The solution wasn't forced on them – they just took to it very easily.** I was expecting more push back.
"

Bryan Bayless, VP GTM Finance is responsible for financial oversight of the Enterprise Business division which accounts for about half of Intel Security's revenues. Motivating and appropriately remunerating its 1,500+ strong sales force in a fiercely competitive and fast moving trading environment is a highly developed and intricate process that needs to be carefully controlled and managed.

The Business Problem

The uniquely complex character of the sales quota and remuneration process meant that sales capacity and remuneration planning has always been managed by finance and operations teams outside of conventional payroll and human resources systems. The finance and operations functions relied on a plethora of disconnected Microsoft® Excel® spreadsheets and up to 40 different Microsoft® Access® databases with only in-business technical support and resources.

"I was concerned that so much sensitive compensation information lived in spreadsheets," said Bayless. "Based on constant audits and reviews, we were confident that people were getting paid accurately but the calculations were spread across 25+ finance and operations personnel based in different geographies around the world and it was difficult to consolidate, review, and approve commission related data in a timely fashion."

The finance organization was constantly bumping up against capacity constraints. Reporting and review timescales, following even the simplest of changes, could take up to 48 hours to turn around.

"I was not only worried about the integrity of the information but also our ability to scale up the operation in the face of growth. If we doubled our size would we end up managing 80 databases?" added Bayless. "So we needed to consider how we could improve the process to be more scalable as well as streamline communications with the sales teams and sales management through swifter review and approval of compensation targets, and more insightful analysis and reporting."

Enter Anaplan

Intel Security contacted Anaplan to hear about its remuneration and compensation process. "It wasn't what I was expecting," said Bayless. "We were looking for a pre-packaged compensation package – a point solution - so I didn't understand how a generic analytical performance management application could help."

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But Bayless, a self-confessed "Spreadsheet Junkie" was impressed with Anaplan from the very outset. "I was intrigued because here was a product that anyone with moderate spreadsheet skills could understand. The logic wasn't dissimilar from spreadsheets yet it was obvious one could build models with almost limitless scalability and integrity."

The notion that Intel Security could build a single data model to be shared by the entire global finance team was very appealing. "Every time we changed some metadata such as the country hierarchy or any one of the several compensation elements in one spreadsheet we had to ensure everyone updated their own spreadsheet as everyone was working in their files live, but invariably something got left out," he said.

But the key challenge for Bayless and the finance team was could Anaplan totally displace the spreadsheets. At some stage or another in his varied career, Bayless had worked with almost every popular business intelligence tool in the market place. Not only did they require extensive IT and consulting support, but they were very expensive and failed to live up to their promise of eliminating spreadsheets. "The first thing I would look for was the 'export to Excel' button for ad-hoc reporting and quick pivot tables," adds Bayless. "If we couldn't say we are no longer using spreadsheets, then the solution failed the test!"

So when Anaplan demonstrated that its models are genuinely self-contained with no need to export to Excel to manipulate and analyze data, the finance team was genuinely impressed.

Ease of Build

Anaplan's grid like interface with tabs was instantly familiar to Bayless's finance team, all of whom were experienced spreadsheet users. They quickly appreciated Anaplan's use of natural language for the construction of business rules, validation logic and calculations. "It was very intuitive and we could instantly see that the cut-over to a new system would be straightforward. We didn't have the budget to spend on lengthy consultancy and training."

Bayless was confident that anyone with modest spreadsheet skills should be capable of specifying new business rules, simplifying existing spreadsheet rules, and reviewing the logic within an Anaplan model after some simple training. The latter point meant that the finance team could maintain the model itself and work independently from the IT function. As it turns out the initial phase-one model
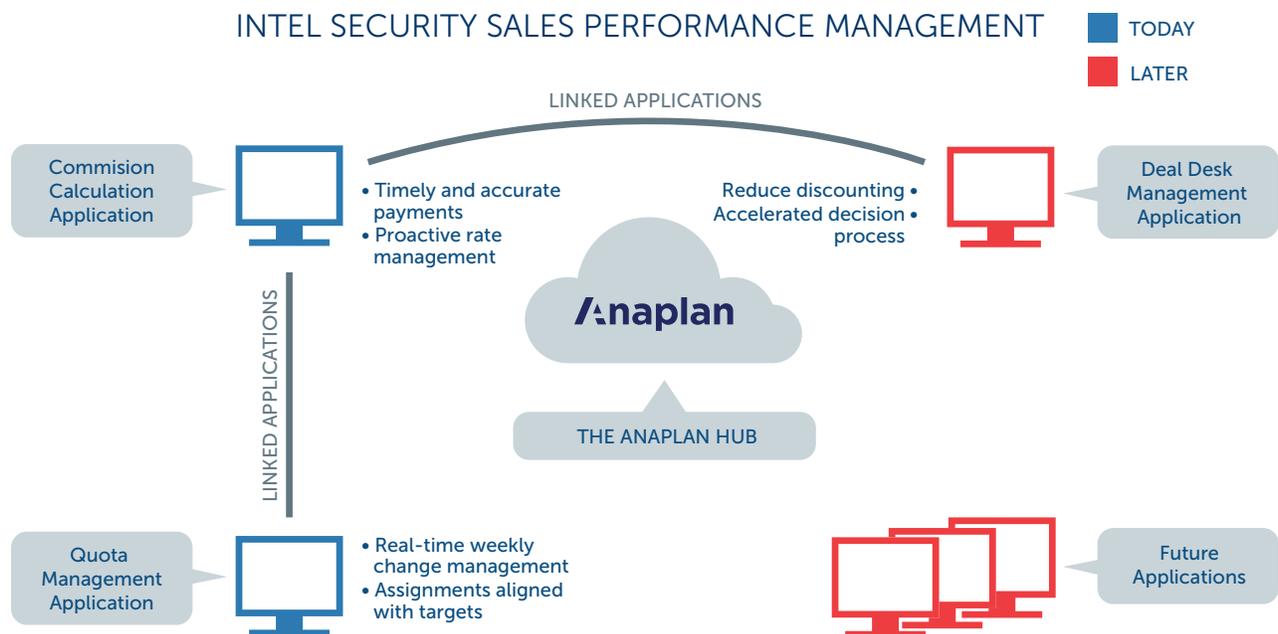
INTEL SECURITY SALES PERFORMANCE MANAGEMENT

TODAY
LATER

LINKED APPLICATIONS

Commision Calculation Application

- Timely and accurate payments
- Proactive rate management

Reduce discounting •
Accelerated decision •
process

Deal Desk Management Application

LINKED APPLICATIONS

Anaplan

THE ANAPLAN HUB

Quota Management Application

- Real-time weekly change management
- Assignments aligned with targets

Future Applications

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> "The ROI is a no-brainer. I'm used to project paybacks measured in years, but **this project's return is measured in months on a cash basis**. If you take account of the resources no longer required and the IT costs we have taken out, then **the ROI is in excess of 400 percent**."

(which replaced 13 spreadsheets) was built by just the finance team, supported by a project manager with no IT background and a solution architect from Anaplan. The initial model was designed, built, and tested within a period of a few weeks. It was after phase one success that Bayless' team saw Anaplan's true potential to replace the database application used to calculate commissions.

Collaboration

The build itself was collaborative but Bayless reports the emergence of a "hive mentality" after the model was deployed. "Everybody on the cloud-based platform is working on the same data so that different countries can work together and the model is instantly updated," he said. "In the past personnel were reluctant to discuss process issues because the system was comprised of a series of disconnected spreadsheets and they didn't necessarily know that their question or issue was shared by others. But now everybody willingly works together and somebody in Sydney can help a colleague in Slough because they share the same model."

Return on Investment (ROI)

The finance team expects to see a significant improvement in productivity as a result of introducing Anaplan. "There won't be a consolidation process anymore," said Bayless. "Data is entered directly into the model and updated in real-time. We don't have to wait 24 to 48 hours to see the results either." Bayless also remarked about the tangible financial benefits of introducing Anaplan "we will cut days out of the process for the entire finance team and be able to use existing resources without the need to hire additional personnel to keep up with the workload."

Additional Usages

The finance project is having an effect on other parts of the Intel Security organization as well. Bayless has a list of additional potential projects for Anaplan in the pipeline. Projects include scenario planning on different compensation models as well as resource planning. "The scalability of the model means that we can look at our recruitment plans at a much more granular level," he said. "It would have been impossible in a spreadsheet-based system. Personnel related expenses account for the majority of our cost base, so I would like to be able to do long range planning two or three years out linking top line performance and sales capacity to help optimize when and where we bring resources on board."

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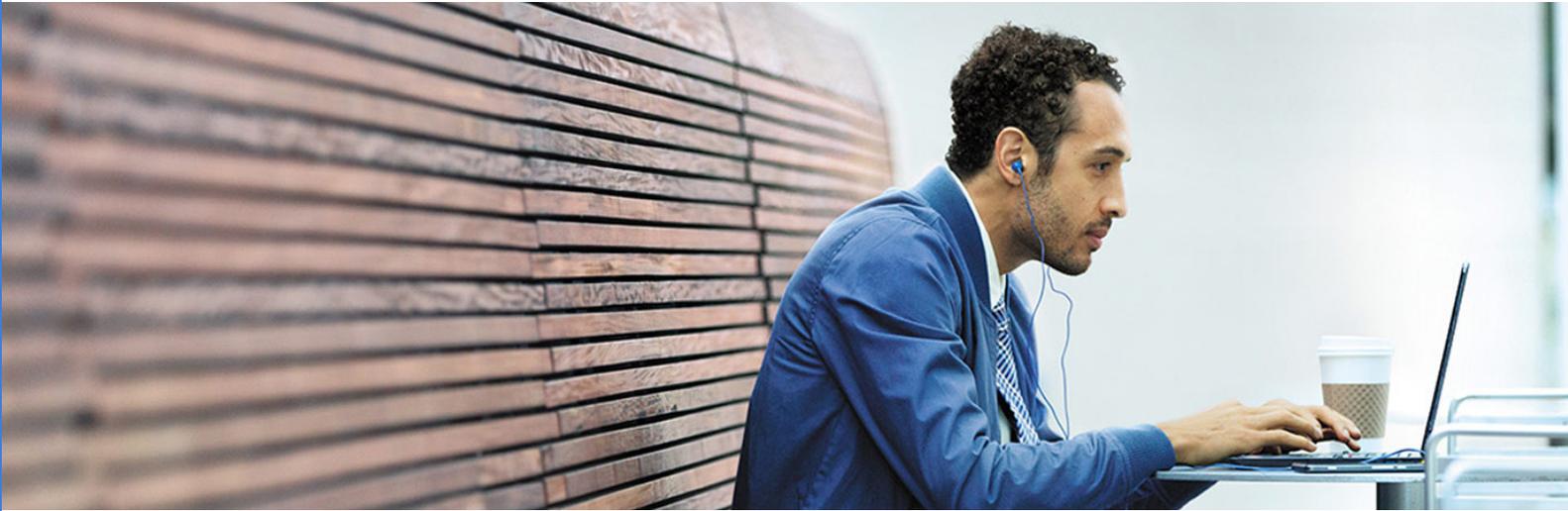
Anaplan – the Organization

Given its background in the field of security, Intel Security is unsurprisingly quite conservative about taking on new systems. So Bayless and Anaplan initially had to work hard to gain acceptance in the organization for a cloud-based solution. Anaplan has also proved its mettle as a supplier overall and although it is a small vendor it punches well above its weight.

"Anaplan feels like a large organization," he said. "It always answers queries quickly and is noticeably 'solutions-oriented' rather than 'sales-oriented' i.e. not using every opportunity to sell more product and services. The team is full of praise for Anaplan and it is one of the best relationships I have ever had with a vendor."

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About Us

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. Follow us on Twitter: @anaplan

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