



Use Cases

Territory & Quota Planning

Challenge

- Disconnected Excel-based planning process
- 30,000 people on sales plan across 178 countries
- Unable to effectively collaborate across 4,000 sales managers and 380+ sales plans
- Limited visibility into worldwide quota deployment
- Top down targets to territory and quota plan took 10 months

Solution

- Single, cloud-based Territory & Quota data model
- Real-time, global collaboration and governance with audit and rollback history tracking
- Advanced sales history analytics to provide data-driven account and territory opportunity assessment
- Consolidated, consistent bottoms-up input to plan
- Real-time KPIs to monitor and optimize deployed plan
- Single, living plan with role-based visibility and controls

Results at a Glance

- Sales letters out in days instead of weeks
- Worldwide Day 1 visibility into deployed quota and sales performance
- Time spent aggregating sales data reduced from a month to three days



Hewlett-Packard transforms sales territory and quota planning across the globe with Anaplan

Introduction

Hewlett-Packard (HP) is a Palo Alto-based, global company with a broad technology portfolio spanning printing, personal systems, software, services and IT infrastructure. They've recently embarked on a multi-year initiative to transform the company, and achieve long-term profitable growth. One of the key levers for driving this transformation is by transforming the applications, the services and the infrastructure that drive HP.

With a sales team encompassing 30,000 sales representatives selling over 150 product lines to customers around the globe, a key element of HP's transformation plan was to dramatically increase their sales performance. HP came to Anaplan to improve visibility into and the effectiveness of their territory and quota planning process to make that happen.



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Before Anaplan

Prior to Anaplan, there was a gap between the design and implementation of their annual sales territory and quota assignments. Although they spent a significant amount of time at the worldwide level to determine the optimal design for how they wanted to go market, and how to best spend their budget, their spreadsheet-based process led to unpredictable deployment and a lack of visibility into what was actually implemented in the field. This left sales leadership without full transparency into actual quota deployment, and some degree of uncertainty that their sales assignments and customers were covered optimally.

"Before Anaplan, we were always looking at what actually got deployed in a rearview mirror," said Sue Barsamian, Senior Vice President, Worldwide Indirect Sales, HP Enterprise Group, Hewlett-Packard. "This was a spreadsheet-run exercise, and by the time that all got rolled back up, and people corrected minor errors along the way, we were usually at the beginning of Q2."

Selection Process

Although HP quickly identified this gap as a significant limitation in reaching their aggressive growth goals, identifying how to solve it proved challenging. The sales team could not initially find a solution that met their needs and planned on creating their own home-grown solution, until they found Anaplan.

"To attack this problem, we were beginning to develop a solution in-house because we really didn't see anything in the marketplace until we came across Anaplan," said Rob Ficalora, Senior Director, IT, Hewlett-Packard. "The capabilities that we could get with Anaplan, frankly, exceeded our expectations and our own requirements for building a homegrown solution. It gave us an opportunity to stretch beyond the ideas that we had for quota deployment."

A key capability that made Anaplan stand out from the pack was the ability to do real-time modeling and handle an impressive volume of data with sub-second response times. This would enable front-line sales management to engage directly in the quota planning process to quickly and easily visualize the effects of the changes they were making, and try out various "what if?" scenarios to deploy the right coverage.

Implementation and Deployment

Unlike many other enterprise software initiatives, which can easily span fiscal years, Anaplan was implemented and in use at HP, by hundreds of users in over 50 countries, in only eight months.

"We made the decision to deploy Anaplan across all of our businesses at the same time, which is really quite a challenge," said Bob Slaby, Vice President Sales Operations, Hewlett-Packard. "But because we could stand up the solution quickly, train our people quickly, leverage resources across HP, across Anaplan, across service providers, we were able to deploy to hundreds of users in more than 50 countries within a matter of weeks."



Benefits

"With Anaplan, we moved entirely away from this being a rearview mirror conversation," said Barsamian. "We don't even go live until we're sure that our design is being deployed as expected and that we are comfortable with the way that quota is actually rolled out. I have been at HP eight years, and I have never seen a start of a year like we had this year, thanks to Anaplan."

The data and the insight that comes out of their use of Anaplan has given HP insight into their deployment model and design that they were never able to uncover when the data sat in disconnected spreadsheets around the world.

Further, Barsamian noted HP has seen solid ROI in terms of time to sales letter. Having the sales letter in hand at the start of the year has shown to influence improvement in quota performance; the sooner somebody gets a sales letter, the quicker they start working towards their target. "There is something about a sales letter that says, 'This is what you need to go, go do it,'" said Barsamian. "And in the old days, when people waited sometimes eight weeks for a sales letter, you were way into the start of the year, and people were still unclear on what their objectives were."

What's Next?

HP is looking to Anaplan to help optimize and change the way they work— not only doing things better, faster, and cheaper, but gaining insights that empower them to drive meaningful process change.

"With Anaplan, we made it easier to deploy coverage and quota with complete transparency, improving sales targeting and performance" said Slaby. "I see all kinds of opportunities with Anaplan. We'll have the ability to compare plans we set in Anaplan to actual performance, build models based on best practices, create simulations that help our businesses test assumptions, and select the best plan. Anaplan will help us move the sales planning process from art to science."

About Anaplan

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.