



Deal Desk

With Anaplan for Deal Desk, sales leaders or “deal desk” managers can optimize the productivity of the sales team while standardizing construction, pricing, and discounting of proposals. Using deal desk, sales teams can quickly and easily construct and price their deal proposal for review. Sales leaders or deal desk managers establish pre-set discount levels and are then engaged to approve non-standard deals and work with cross-functional stakeholders on deal solutions.

Construct, price, and quote non-standard pricing, discounting, and quoting of sales deals. B2B companies often implement sales desks to aid with closing sales deals. Construct, price, and quote complex, high-value, competitive deals with long sales cycles and high cost of sales more efficiently.

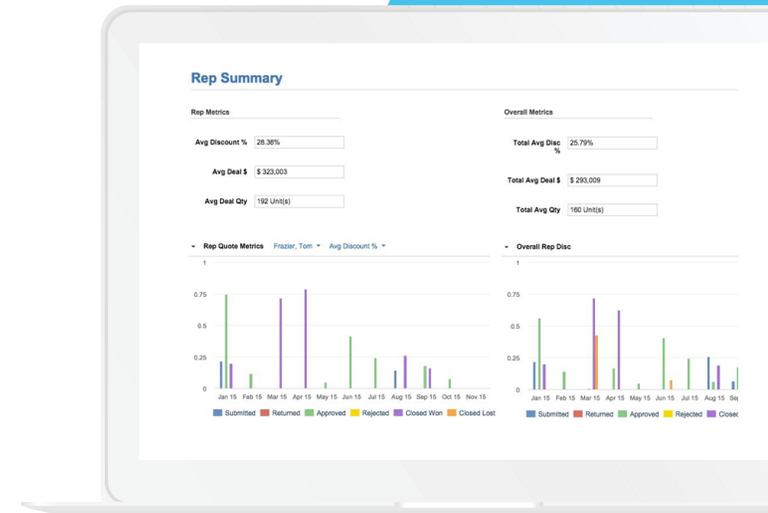
Streamline price and approval process of sales deals and get sales reps back selling. Deal review and approval processes with sales and internal business units, such as legal and procurement, can be time consuming and difficult, resulting in sales reps spending too much time on activities such as proposal and contract development. Deal Desk provides efficiencies to sales reps and streamlines the process of constructing, pricing, and discounting sales deals.

Configure pricing and discounting thresholds to increase revenue and profitability margins. Establish specific thresholds that identify pricing and discounting boundaries. Sales deals that have been priced and

discounting below specific thresholds do not require review and approval while others above specific thresholds will follow a deal desk workflow review and approval process.

KEY BENEFITS

- Key benefits
- Establish consistency with a pricing and discounting model that reps use to construct, price, and quote sales deals
- Reduce time sales reps spend constructing, pricing, and providing quotes so they can increase time spend selling
- Establish a process for managing complex, high-value, competitive deals with long sales cycles and high cost of sales
- Define when and which pricing and quote proposals are submitted for a workflow review and approval process to increase revenue and better profitability
- Optimize revenue and profit margins for the organization and all stakeholders



By deploying Anaplan for Deal Desk, McAfee is able to standardize how sales deals are structured by their 1,500 sales people across 130 countries. McAfee now has better control of pricing and profitability of sales deals that are complex, high-value, and competitive while reducing sales cycle time and cost of sales. With integration to Anaplan for Incentive Compensation Planning, sales reps have visibility into pricing and discounting practices and how this impacts their compensation and earnings.

Benefits

- Forecasting data based on Salesforce opportunities and account data with Big Machines pricing and quoting data
- Better alignment with Sales, Finance, and Operations with reliable monthly sales forecasts
- Sales forecast calls focused on outliers and changes instead of data consistency
- Went from concept to deployment in nine months

Key Features

Establish pre-set pricing and discounting thresholds

Configure pre-set pricing and discounting thresholds to determine which sales deals will automatically be approved and which sales deals need to follow a workflow review and approval process.

Configure alerts and notifications Set dashboard alerts and notifications to inform sales reps when sales deal pricing and discounting reviews and approvals are required before providing a quote to the customers.

Reference a single point of entry for all sales deals

Sales reps have a single point of entry for all sales deal pricing and discounting negotiations, reviews, and approvals coordinated between Sales, Finance, Legal, and Operations while following corporate standards and governance.

Build deal desk rules with familiar formulas Apply easy-to-use Excel-like formula builder to configure deal desk.

Define workflow and routing process for sales deal pricing, discounting, and quotes Establish workflow and routing process to ensure the proper review and

approval of deal pricing, discounting, and quotes have been obtained at every level within the sales team and organization.

Enable sales reps to see the impact of pricing changes on their compensation Allow sales reps to view the impact to their sales compensation and earnings based on pricing and discounting of deals. Motivate sales reps to provide the best quote for the customer, the organization, and themselves.

Apply effective dates to customer quotes Maintain history of customer quotes through effective dating, versions, and audit tracking

Analyze accounts with data visualization Reference built-in dashboards, reporting, and analytics with data visualization (charts, graphs, maps, etc.). Dashboards and reports are updated immediately. Analyze account segments and scoring to make better decisions with actionable insights.

Support data integration (import and export) Integrate with any upstream or downstream system using a pre-built connector to Salesforce, third-party connectors (e.g. Mulesoft, Dell Boomi, SnapLogic, and Informatica) or self-service import and export with Excel.

“What-if” scenario modeling and analysis Create “what-if” scenarios and modeling to analyze the impact to the sales forecast if a specific business, economic, or competitive situation were to occur. Prepare for challenges that you could encounter in your upcoming deal cycles.

Enable MS Office integration Utilize integrations with Microsoft Office™ Excel®, Word®, and PowerPoint® to provide productivity and efficiency when delivering presentations or reviewing sales performance metrics in sales meetings.

Implement top security with reduced IT costs

Single, continuously monitored multi-tenant cloud platform and infrastructure. Role-based security, user management and single sign-on support. Disaster recovery and full data encryption.

Reference and analyze historical data Maintain history of sales deal pricing, discounting, and quotes through effective dating, versions, and audit tracking.

Anaplan for Sales end-to-end solution integration

Upstream integration with enterprise systems such as CRM and ERP. Downstream integration with Anaplan for Incentive Compensation Planning app for a comprehensive end-to-end solution.



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. To learn more, visit anaplan.com.