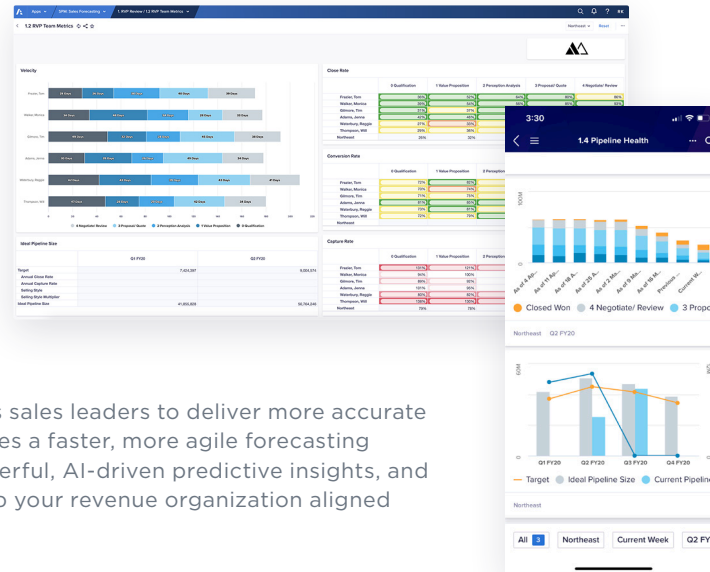


# Sales Forecasting

## Anaplan for Sales

Most sales forecasting techniques rely on historical sales patterns and seller intuition to provide projections of current and future deals. Even in optimal market conditions, forecasts require monitoring and revisions. In more volatile environments, sales projections can become obsolete within days, creating an urgent need for a more agile and continuous approach.

Anaplan's Sales Forecasting solution allows sales leaders to deliver more accurate and precise revenue projections, and enables a faster, more agile forecasting approach. Optimize your pipeline with powerful, AI-driven predictive insights, and embrace continuous planning that can keep your revenue organization aligned while driving better decision making.



### Provide an accurate and trusted sales forecast.

Leverage third-party data to clean and optimize your sales pipeline, and deliver a more accurate forecast to drive better decision-making in Sales, Finance, HR, and Supply Chain, and other departments.

**Connect the forecast with sales planning and performance.** Align real-time forecast and optimized pipeline to financial and sales planning models. Calculate quota attainment and estimated compensation payouts, make adjustments to sales capacity, align territories, and determine quota relief.

**Empower sales forecasting and pipeline management on an enterprise scale.** Ensure that everyone in every area of the business is maintaining revenue projections and sales forecasts using a standard methodology and process, and quickly perform complex calculations across any number of dimensions.

### Key benefits

- Provides an accurate, trusted, real-time sales forecast
- Focuses the sales organization on high-potential, desirable, winnable deals, resulting in more reliable and predictable revenue
- Enables improved decision-making based on a data-driven sales forecast and actionable insights
- Helps develop a sales forecast benchmark from historical sales performance, trends, seasonality, and third party-sourced intent data
- Removes bias from sales projections and builds trust with reliable, actionable information
- Reduces sales pipeline and forecast risks while aligning with sales quotas and revenue expectations
- Reduces cycle times and time spent planning territory coverage and setting quota assignments

### CUSTOMER STORY

## DocuSign

As DocuSign expanded across the globe, its sales forecasting became difficult to scale. Manual forecasting processes combined with data from disparate systems led to inefficiency and inconsistency. Using Anaplan, DocuSign created a more consistent forecasting process, and de-risked its process by dramatically reducing data gaps.

### Benefits

- Better alignment between Sales and Finance, with reliable sales forecasts
- De-risked sales forecasting, with fewer missed targets
- Decreased need for data consistency and integrity checking, allowing for more time driving data-driven decisions

“Having everyone on the same sales forecasting system has taken a lot of the risk from the business.”

Jeremy Scheffel, Senior Director of Sales Performance Intelligence

## Key features and capabilities

### Maintain an accurate and trusted sales forecast

Quickly review pipeline potential and increase sales rep accountability while spotting “sandbagging” and “overcommit” behaviors. Sustain and share an accurate and up-to-date forecast from one place.

### Execute sales forecast simulations and outcomes

Make changes to drivers and execute sales forecast simulations to project future impact on sales performance.

### Leverage Anaplan Predictive Insights to optimize your pipeline

Use our proprietary AI technology to gather insights and intent data on accounts in your pipeline, and create actionable recommendations to help your team pursue only the best opportunities.

### Analyze trends, changes, and patterns in the sales forecast over time

Develop time-based dashboards and key performance indicators (KPIs), such as velocity calculations, trending analytics, and seasonality fluctuations.

### Conduct scenario modeling and analysis

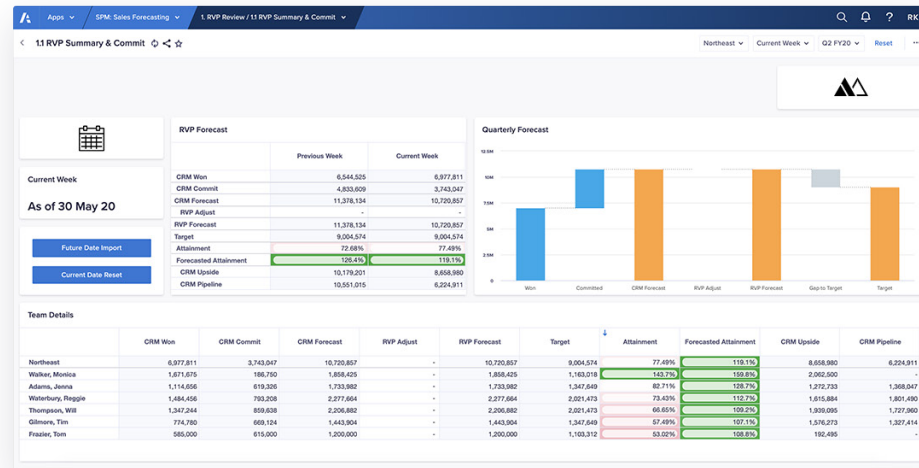
Create “what-if” analyses and scenario modeling to assess the impact to the sales forecast if a specific business, economic, or competitive situation were to occur. Prepare for challenges that you may encounter in your upcoming deal cycles.

### Build sales forecasting calculations with familiar formulas

Apply easy-to-use formula builder to configure forecasting models.

### Leverage CRM data to build projections and analyze multiple outcomes

Leverage customer relationship management (CRM) data including accounts, opportunities, and other objects to feed forecast models and build a more accurate view of the pipeline.



### Compare forecasts and improve reliability based on multiple modeling techniques

Create sales forecasts based on qualitative, time series analysis and projection, and causal modeling techniques, while comparing the degree of certainty with the sales forecast accuracy and predictability.

### Forecast across geography, products, accounts, and more

Develop sales forecasts by geographic locations, product lines, and accounts, or change any of these dimensions to analyze the sales forecast at any level of granularity — e.g., by state/city, a specific set of product SKUs, or a group of accounts in a selected vertical.

### Support data integration to external solutions and data sources

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

### Analyze performance with data visualization

Built-in dashboards, reporting, and analytics with data visualization (charts, graphs, maps, etc.). Dashboards and reports are updated immediately. Analyze sales forecast and sales performance metrics to make better decisions with actionable insights.

### 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 forecast through effective dating, versions, and audit tracking.

### Enable Microsoft Office integration

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

## About Anaplan

Anaplan (NYSE: PLAN) is pioneering the category of Connected Planning. Our platform, powered by our proprietary Hyperblock™ technology, purpose-built for Connected Planning, enables dynamic, collaborative, and intelligent planning. Large global enterprises use our solution to connect people, data, and plans to enable real-time planning and decision-making in rapidly changing business environments to give our customers a competitive advantage. Based in San Francisco, we have over 20 offices globally, 175 partners, more than 1,250 customers worldwide.

To learn more, visit [anaplan.com](https://anaplan.com).

