



## Anaplan for Salesforce:

### Expanding the value of CRM

One of the surest technology bets a sales leader can make is to arm their sales organization with a CRM solution. Today, CRM systems are indispensable for managing leads, tracking opportunities, and accelerating pipeline. It's no wonder more than 90% of organizations now employ a CRM, and no wonder that the majority use Salesforce – the market leader in CRM solutions. At the same time, this also means that CRM technology no longer provides the competitive advantage it once did.

The responsibility for finding that next competitive edge now falls on the shoulders of sales leadership. It's sales leaders who, in addition to monitoring and coaching salespeople, are now charged with defining the organization's go-to-market strategy—the all-encompassing sales plan for achieving corporate objectives. This is the organization's roadmap for growth, and the step-by-step blueprint for achieving those goals. While traditional CRM systems can support some of these efforts, defining and managing a go-to-market strategy requires greater technological capabilities. Anaplan is the sales planning platform designed to work with Sales Cloud to empower the strategic decisions of sales leaders.

**“Anaplan is really one vision of the truth. You can look at it from all angles.”**

**ALYSON LOUGHEED, MANGER OF SALES COMPENSATION, TELUS**

### Components of a go-to-market strategy

A go-to-market strategy answers three questions: Where to sell? How to sell? What to sell? The answers to those questions define the pillars of your sales plan.

#### Sales Planning

*Where to sell*

How you divide up your market to best align your sales team.

Territory planning, quota setting, account segmentation, and sales coverage.

#### Sales Incentives

*How to sell*

How you motivate your salespeople.

The incentives that nudge your team in the right directions, including your strategies for measuring their effectiveness and modifying them when goals change.

#### Sales Insights

*What to sell*

The information you gather and analyze to make the right decisions.

Pipeline management, sales forecasting, pricing, discounting, and other analytics.

Anaplan and Salesforce, together, create the union of planning and execution that drives success in sales.

*Planning + Execution = Sales Success*



✓Revenue Growth

✓Cost Savings

✓Customer Success

## Empower sales with a complete planning and execution solution

Together, Anaplan and Salesforce provide a solution that seamlessly integrates sales planning processes with sales execution activities to improve go-to-market agility, increase sales alignment, and drive financial results.



### Dynamic

Quickly change plans and rapidly realign based on actuals and forecasts

### Collaborative

Coordinate goals, activities, and insights across Sales, Marketing, Finance, HR, and others

### Intelligent

Optimize territories, coverage, quotas, and incentives to drive sales performance

## Anaplan & Salesforce Partnership

### Key capabilities and benefits

- Optimized territories, sales coverage, quotas, and comp plans
- Planning and modeling across all sales processes
- Real-time visibility and insights on performance and metrics
- Pipeline optimization and intelligent sales forecasting
- Compensation estimation that drives sales behaviors
- Pricing and discounting optimization
- Accrual forecasting and visibility
- Improved sales productivity from automation

## Salesforce integration

Anaplan offers multiple options to bi-directionally coordinate data and workflows with Salesforce.

### Data connection options

Integrate data from Sales Cloud and other Salesforce clouds, or any cloud/on-premise application or database with Anaplan as either the source or the target

- MuleSoft, Informatica, Dell Boomi, and SnapLogic connectors
- HyperConnect from Anaplan—one-stop data integration

### Anaplan data within Salesforce

- Sales users can access Anaplan data from within the Salesforce user interface (no need to access a separate system)
- Lightning and Classic UIs are supported

## Customer highlight



### Anaplan for Sales

Territory and quota planning increases sales performance

### Challenges

- Planning territories and quotas for 20,000 sales reps across 170 countries
- Plans finalized many months after new fiscal year started
- Adapting to changes during fiscal year

### Results

- Finalized plans before new FY
- Insights around which plans working and not working
- Able to constantly adapt to change

## Engage with Anaplan

Join us at our booth for these forthcoming Salesforce World Tours

- Los Angeles, California
- Dallas, Texas
- Atlanta, Georgia
- New York, New York

**November 28, 2018**  
**November 28, 2018**  
**December 5, 2018**  
**December 13, 2018**