



PLNR - Sales-Driven Planning

Plan your top line in Salesforce®



PLNR - Sales-Driven Planning is a sales planning solution natively built on the Salesforce® Platform. PLNR provides a comprehensive single platform to plan the top line. PLNR quickly helps companies grow while driving increased productivity and accountability, increasing executive visibility into the revenue pipeline, reducing administrative efforts, streamlining the sales planning process, and increasing collaboration among the revenue-producing functions of the business.

Key Benefits

PLNR helps growth-focused organizations:

- Plan their top line at the Territory, Account and Opportunity level
- Compile the entire sales team's forecast instantly
- Align Marketing and Operations budgets and activities within the Sales Plan
- Visualize and analyze the sales organization's planning data to monitor and drive performance

Why PLNR?

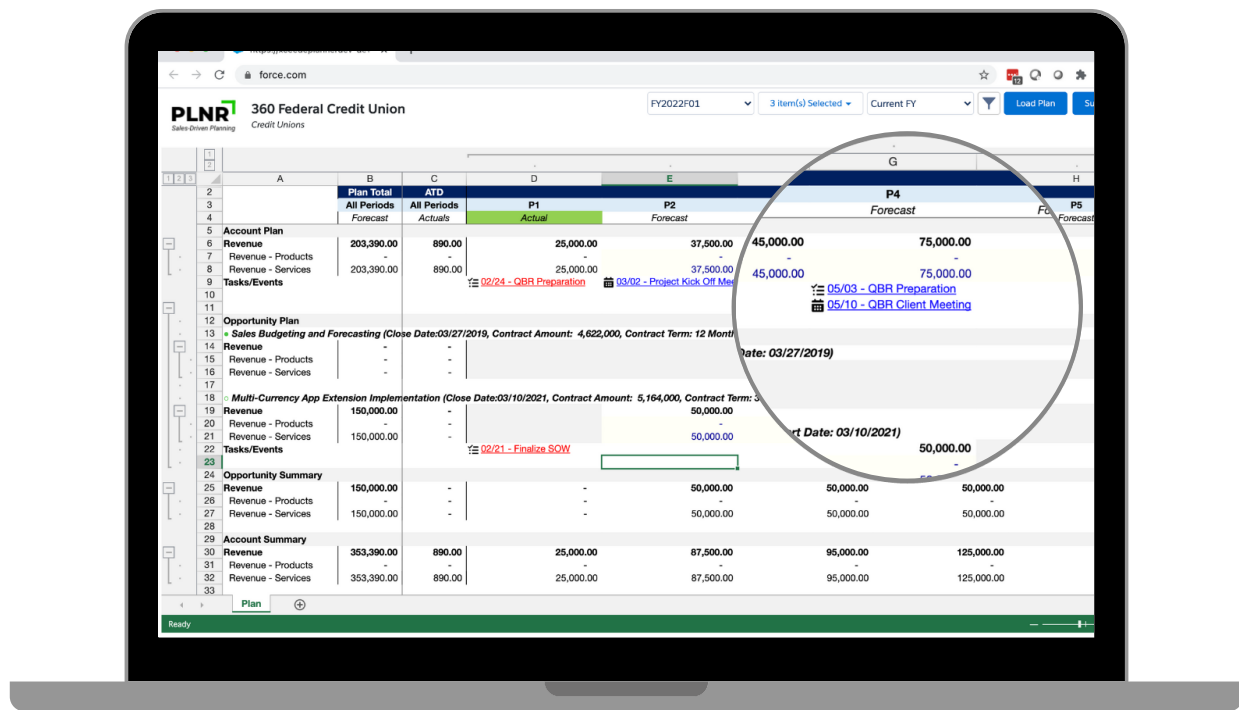
PLNR helps B2B revenue teams plan so they can meet and exceed their revenue targets. With PLNR, you gain complete visibility and control over your entire revenue and the activities needed to produce it — in real-time, from the assignment of targets to executives at the Territory Level all the way down to a single sales rep planning how to maximize a single opportunity, all while eliminating the need to compile forecasts from spreadsheets and controlling versions manually.

Key Features

Multi-currency. Leverage Multi-Currency and Advanced Multi-Currency features to build plans in local and corporate currencies, allowing for multinational expansion and growth management.

Territory Management. Leverage your existing Salesforce® Territory Models to build your overall Target setting and bottom-up budgeting and forecasting.

Planning and Approval Workflows. Implement robust planning and approval workflows across your Sales and Marketing organizations



Territory, Account, Opportunity Management. Leverage your existing Salesforce Territory, Account, and Opportunity information to set your targets and build your bottom-up budgets and forecasting.

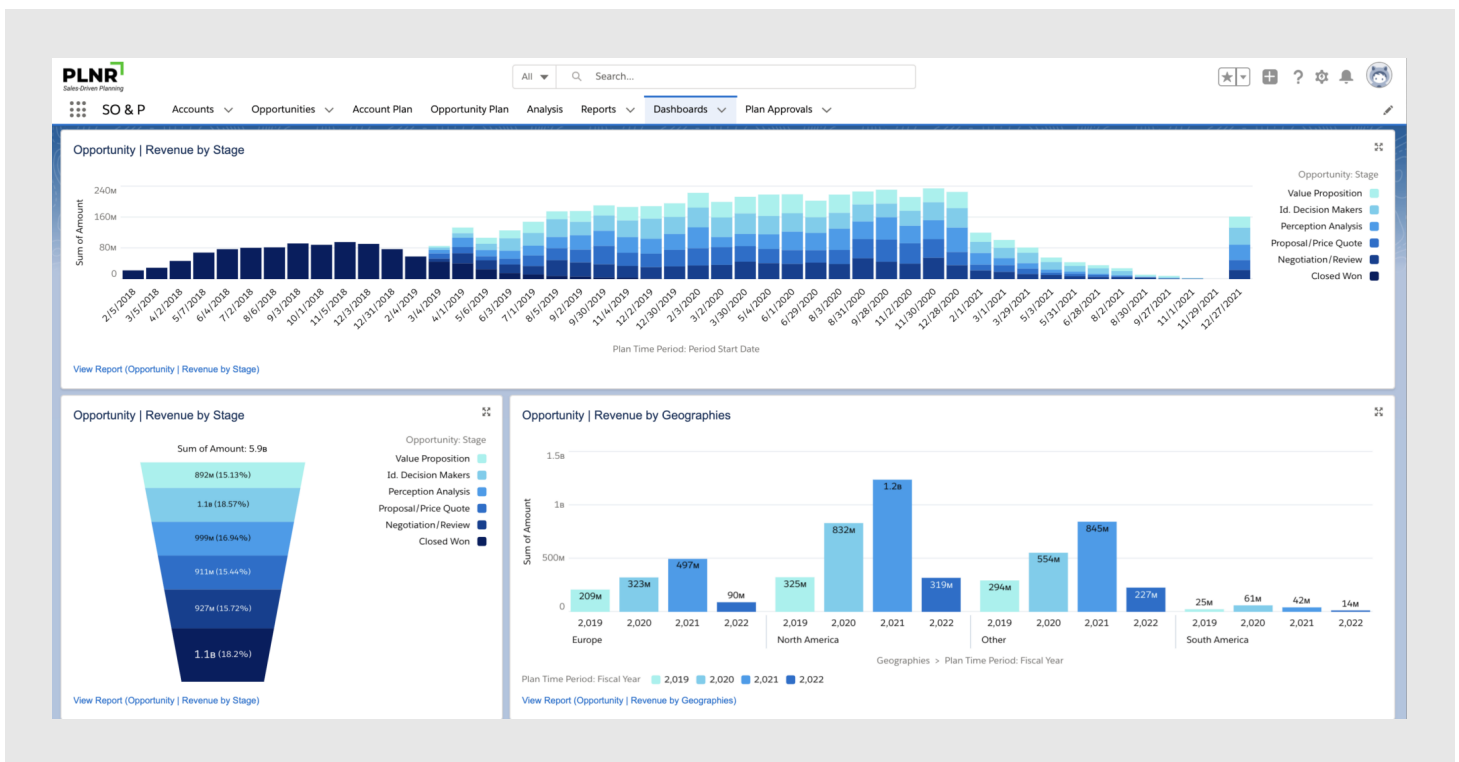
Key Performance Indicators. Define and plan against your Financial and Non-Financial KPIs.

Reports & Dashboards. Leverage out of the box Reports and Dashboards to analyze budgets and forecasts. Build advanced visualizations with Tableau CRM.

Artificial Intelligence. Utilize Artificial Intelligence capabilities (Einstein) to uncover and mitigate against business risk.

Security Model. Your planning activities are governed by your existing security model within your Salesforce environment

Data Integration. Bring in data from your ERP and other corporate systems of record to inform your budgeting and forecasting activities using our built-in integration platform options.



**Supercharge your growth
beyond the limits you see today.**



One Integrated Plan.

Align Sales, Marketing, and Operations inputs in a single plan for leadership

**View a two-minute
video overview of PLNR at:**

plnr.io



Ongoing critical activities and adjustments.

Focus on critical activities across the organization that will drive to meeting your goals. Remain nimble by making the necessary adjustments.



Drive Business Outcomes.

Ensure your plan and adjustments are focused on delivering the desired business outcomes. Provide management with key analysis to make critical decisions.

Follow us



© 2021 Xceede Solutions Inc. All rights reserved.

No part of this publication may be reproduced or transmitted in any form or for any purpose without the express permission of Xceede Solutions Inc.

Salesforce, Sales Cloud, and others are trademarks of Salesforce.com, Inc. and are used here with permission.