SCOPING QUESTIONNAIRE

Sales Organization

☐ How is the sales force organized?
  ☐ Is the sales force reporting structure different than the selling structure?
    ☐ How many levels are there for each?
    ☐ What does each reporting structure look like?
    ☐ Is the hierarchy balanced or ragged (i.e., does it skip levels)?

☐ Do you have channel territories?
  ☐ How many levels are in this hierarchy?
  ☐ Is the channel hierarchy balanced or ragged (i.e., does it skip levels)?

☐ How do you currently track individuals moving throughout the year, especially when managing assignments?
  ☐ Does your planning process require accommodating movements, or is reporting the primary requirement?

☐ What is the current planning cycle/cadence?

☐ Does your organization have overlay specialists?
  ☐ How are they assigned (i.e., geo, industry, products, etc.)?

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Account & Territory Assignment

SCOPING QUESTIONNAIRE
SCOPING QUESTIONNAIRE

Account & Territory Assignment

☐ What attributes determine territories?
☐ How are territories assigned?
☐ Do you assign territories to people, people to territories, or both?
☐ Do you assign accounts to people or territories, or both?
☐ Do you plan by products? How is this planned?
☐ How do you optimize or balance your accounts (i.e. by bookings, by available sales reps, etc.)?
☐ Do you regularly rebalance territories? If so, how often?
☐ How are new hires assigned to a territory?
☐ Do you need to plan for 'To-Be-Hired (TBH)’ headcount?
  ☐ If so, how do you transition a 'TBH’ to a real person?
☐ Could territories be transferred in whole between individuals?
  ☐ Is there an established territory/account transfer process?
☐ Are there team assignments?
  ☐ How do these function?

☐ Can anyone (any level) in the hierarchy have an assignment?
☐ Do you use rule engine to assign accounts to territories, or any other logical account-to-territory baseline?
☐ How do you handle global accounts?
☐ What are the downstream account reporting requirements?
☐ What are the downstream territory reporting requirements?
☐ What downstream territory management hierarchies are there?
☐ In what currencies do you capture your bookings and TAM? Do you need to show both local and constant currencies?

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Products

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Products

- Do you have bookings by product?
- Do you set targets at the product level?
- What does your product hierarchy look like?
  - How many levels do you need for planning?
  - Is the hierarchy consistent across the organization?
  - At what level of the product hierarchy will you import/input data for analysis?
- Do you plan for every product, or a subset of products?
SCOPING QUESTIONNAIRE

Data

- How many people, managers, and quota-carrying reps are in your sales hierarchies?
- How many accounts need to be planned? What is your expected account growth in the next 1 to 3 years?
- How many products need to be planned? What is your expected product growth in the next 1 to 3 years?
- How many years of historical data is needed?
- How many future periods do you need to plan?
- How granular does the timescale need to be (e.g., year, quarter, month, week)?
- Do you require versioning of all or part of your data set?
  - If so, how many versions do you need?
- What data extracts do you expect (e.g., rep account assignments, territory hierarchy report, etc.)?
  - How often do you need them?
- Which upstream and downstream systems need to be integrated?
  - Do these integrations need to be automated? Or will they be manual?
    - Are there any data integration tools in place?
  - How often are data transfers / syncs conducted?
  - Do you have a data mart / data lake strategy currently in place?
- What is your current process and frequency around adding new accounts to the planning system?
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Users

- What are the types of roles of the anticipated users of Anaplan?
  - How many users do you anticipate for each type of role?
- How will each role interact with the model?
  - Are there individuals who fit into more than one role?
- How are the users accessing the platform? Via Single Sign-On (SSO)? Or else?
- What level(s) of hierarchies should the permission be granted?
User Interface

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User Interface Design

- Who are the end users?
- What is their technical aptitude?
- What are some examples of current user interfaces?
- Do the users use PC, Mac, or both?
  - What is the typical resolution of the users’ computer screen?
  - What browser(s) are used?
- Are other devices used? If so, what (e.g., mobile, tablet, TV screen, double screen, etc.)?
Other Considerations

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Other Considerations

☐ How would you measure success of your project? Which metrics do you need to achieve?
☐ How are the decisions made in your organization?
  ☐ What are the technical criteria to make a decision?
☐ Who will sign off on moving forward at each stage?
☐ Who is in the power base?
☐ What is the consequence of doing nothing?
☐ Who is willing to carry the Anaplan flag internally?
☐ Who is your executive sponsor?
☐ Who is your project sponsor / business owner?
☐ Who are the model owner(s)? Model builder(s)?
☐ Who will attend Anaplan training? How many people?
☐ Do you have change management resources who will help with training?
☐ How do you plan to train your end users?
☐ Users will need to have suitable access to modules, lists, versions and actions. Who will provision users?
☐ What is your desired go-live timing?