



Scoping Questionnaire

ACCOUNT SEGMENTATION & SCORING

 anaplan

Sales Hierarchies

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Sales Hierarchies



- ☐ How is sales territory hierarchy organized?
 - ☐ How many levels are there?
 - ☐ What does each reporting structure look like?
 - ☐ Is the hierarchy balanced or ragged (i.e., does it skip levels)?
- ☐ Do you map in external data sources to get account TAM?
 - ☐ If so, do you have a customer registry database doing the mapping from external to internal account hierarchies?

Account Segmentation & Scoring

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Account Segmentation & Scoring



- ☐ What is your current account segmentation and scoring process?
 - ☐ How do you use segmentation and scoring to drive rep assignment, quota assignment, etc.?
 - ☐ Do you use traditional GTM pyramid for segmentation? If not, what other methodology do you use?
 - ☐ Does the scoring exercise and resulting account potential impact the segmentation exercise?
- ☐ How often do you currently do account segmentation and scoring exercise?
- ☐ Is your segmentation assigned in your CRM?
- ☐ If you have a scoring process, what are the factors and weights?
 - ☐ Do you consider your product hierarchy as a factor in scoring?

Data

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Data



- ☐ 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?
- ☐ 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., account segments, account potential, etc.)?
 - ☐ How often do you need them?
- ☐ Which upstream and downstream systems need to be integrated?
 - ☐ Do these integration need to be automated? Or will they be manual?
 - ☐ Are there any data integration tools in place?
 - ☐ Are there any third-party data sources to integrate?
 - ☐ 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?

Users

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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?