Scoping Checklist

SALES COVERAGE / CAPACITY PLANNING

Anaplan

Sales Organization

SCOPING QUESTIONNAIRE

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Sales Organization

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- ☐ How is the sales force organized?
  - ☐ Is the sales force reporting structure different from 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)?
- ☐ What is the current planning cycle / cadence?
- ☐ Does your organization have overlay specialists?
  - ☐ How are they assigned (i.e., geo, industry, products, etc.)?

Coverage Calculations

SCOPING QUESTIONNAIRE

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Coverage Calculations

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- ☐ Do you have optimal coverage ratios by role defined?
    - ☐ If not, how do you identify coverage gaps today?
- ☐ Where is sales capacity in your financial target setting process?
    - ☐ Do you look at capacity, then set revenue targets? Or do you set growth targets, then set revenue targets based on the growth target?
- ☐ What drivers and assumptions do you use in your current coverage and capacity calculations?
    - ☐ What are your sales rep ramping profiles by role?
    - ☐ Do you have productivity information by rep?
- ☐ At what level do you identify coverage and capacity?
- ☐ Do you have skills assessment on your sales reps?
- ☐ At what level does your financial team issue revenue targets?
    - ☐ Can you map them to appropriate sales regions?
    - ☐ Are they set by product?

Products

SCOPING QUESTIONNAIRE

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Products

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- ☐ Do you have bookings by product?
- ☐ Do you set targets at the product level?
- ☐ How many levels do you need for planning?
  - ☐ Is this 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?

Data

SCOPING QUESTIONNAIRE

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Data

Anaplan

- [ ] How many people, managers, and quota-carrying reps are in your sales hierarchies?
- [ ] 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., proposed sales headcount plan, 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?
  - [ ] How often are data transfers / syncs conducted?
  - [ ] Do you have a data mart / data lake strategy currently in place?

Users

SCOPING QUESTIONNAIRE

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Users

Anaplan

- ☐ 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

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- ☐ 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

SCOPING QUESTIONNAIRE

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Other Considerations

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- ☐ 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?