

STANDARD USER STORIES

Sales Coverage / Capacity Planning

Anaplan

Epic: Coverage/Capacity Planning Assumptions

User Story Title: Productivity Assumptions

Who? Sales operations team member

What? Import and update the productivity assumption table for capacity calculations

Why? Be able to calculate the sales capacity of the existing sales force + TBH(s)

How? Import, create or calculate a Current Year productivity assumption table by rep role

Description:

As a sales operations team member, I can import and update the productivity assumption table for capacity calculations, so that I can calculate the sales capacity of the existing sales force + TBHs.

This is a critical request, and I will know it's achieved when I can import, create or calculate a current year productivity assumption table by rep role.

Data Inputs:

- Historical bookings data by account
- Historical account to rep assignment
- Historical quota assignment by rep
- Headcount plan (TBH)

Complexity Estimate: Low

Level of Effort Estimate: Low

Sprint Cycle: Sprint 1

Sprint Points Assigned: TBD

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Epic: Capacity Calculation

User Story Title: Coverage Gap Analysis

Who? Sales operations / finance team member

What? Calculate sales capacity based on assumption tables and compare the output to financial targets

Why? Identify sales region coverage gaps

How? Based on capacity calculation formulas set in Anaplan

Description:

As a sales operations team member, I can calculate sales capacity based on assumption tables and compare the output to financial targets, so I can identify sales region coverage gaps.

This is a critical request, and I will know it's achieved when I can validate calculated capacity and coverage gaps by sales region.

Data Inputs:

- Current financial targets
- Assumptions (e.g., coverage ratios, productivity, ramping profile, seasonality, etc.)
- Sales reps by role
- TBHs by role

Complexity Estimate: Medium

Level of Effort Estimate: Medium

Sprint Cycle: Sprint 2

Sprint Points Assigned: TBD

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Epic: Iteration

User Story Title: Sales Headcount Plan

Who? Sales operations team member & workforce planning team member

What? Sales operations analyst will request modification to headcount plan based on the capacity/coverage gaps via a shared dashboard

Why? In order to resolve sales capacity / coverage gaps

How? Based on shared dashboard built in Anaplan

Description:

As a sales operations team member, sales operations analyst will request modification to headcount plan based on the capacity/coverage gaps via a shared dashboard in order to resolve sales capacity / coverage gaps.

Sales operations team member will request changes to TBH headcounts, and the workforce planning team will either accept or reject the request.

I will know it's achieved when I can use a shared dashboard that shows coverage gaps, requested changes, and status of change requests.

Complexity Estimate: Medium

Level of Effort Estimate: Low

Sprint Cycle: Sprint 3

Sprint Points Assigned: TBD