



Scoping Questionnaire

QUOTA PLANNING & MANAGEMENT

 anaplan

Sales Organization

SCOPING QUESTIONNAIRE

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Sales Organization



- 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)?
- 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?
- Does your organization have overlay specialists?
 - How are they assigned (e.g., geo, industry, products, etc.)?
- How are the quota-carrying reps identified?

Quota Assignment

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Quota Assignment



- Who is responsible for setting quotas (e.g., account owners, managers, VPs, finance, etc.)?
- Do you cascade top-down (i.e., using financial targets to push down), bottom-up (setting lowest-level targets to derive a top-level goal), or both?
- What is your current methodology for cascading quota to territories?
 - Is it standard across geography, or separate per region?
 - What do you use as a baseline? (e.g., last year, last 3-year's average, etc.)
 - Are there exceptions? For instance, is there disaggregation needed to give parts of a quota based upon a particular compensation plan?
 - Can you share an example of each?
- At what level are individuals commissioned (e.g., account-product, individual-product, whole account, whole individual, whole product, team assignments)?
 - Does this vary by role? Product? Geography? Company?
- Do sales managers up through executives carry a quota? If so, how is it assigned?
 - Can individuals have multiple quotas?
 - How often are quotas set?
 - How are quotas assigned to direct reps?
 - How is the quota set for overlays?
 - Do you include account plans for quota letters?
 - Do you have any negotiation period for reps to accept the quota letters? Or do they not have option to negotiate or question?
 - How do you assign new hire quotas throughout the year?
 - When do the quota letters typically go out?
 - What's the time period currently, and what is the goal for getting the quota letters out with Anaplan?
 - Where are the quota letters stored?
 - Do you have e-signature tool in place?
 - What is the current planning cycle / cadence?

Compensation Plans

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Compensation Plans



- Do you plan to assign and/or maintain compensation plans?
- Please describe the nature of the compensation plans. Are the necessary inputs included in the planning process for their assignment?
- If an individual changes compensation plans throughout the year, does that impact their quota?
 - Do you need to track these changes?
- How many compensation roles and plans do you have today?
 - Are new plans added annually?

Products

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Products



- Is anyone compensated by product sales?
 - If yes, proceed with questions below
- 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

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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 required?
- 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, compensation plan export, 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?
 - Are there any e-signature tools in place?
- How often are data transfers / syncs conducted?
- Do you have a data mart / data lake strategy currently in place?

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?