



# Scoping Questionnaire

DEAL DESK AND PRICE OPTIMIZATION

# Sales Organization

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)?

# Deal Desk Process

SCOPING QUESTIONNAIRE

# Deal Desk Process

- What is the default approval process of a quote?
- What level(s) do you require approvals, and what are the triggers that differentiate levels?
- What system do you use to approve quotes? Where are the quotes stored?
- How do your quotes impact compensation calculation?
  - Do you currently calculate attainment impact or the actual dollar commission amount – if so, how is it calculated?
- Do we have to incorporate revenue recognition logic?
- What is your discounting guidelines?
- How do you calculate net to company?
- What is the process of obtaining the price book? Does it vary by geo, region, etc.?

# Data

SCOPING QUESTIONNAIRE

- How many people, managers, and quota-carrying reps are in your direct sales hierarchies?
- How many accounts and opportunities need to be forecasted? What is your expected account and opportunity growth in the next 1 to 3 years?
- How many quotes need to be modeled? What is your expected customer growth in the next 1 to 3 years?
- How many years of historical data is needed for analysis?
- Do you require versioning of all or part of your data set?
  - If so, how many versions do you need?
  - What kind of what-if scenarios do you typically perform?
- What data extracts do you expect (e.g., opportunities, quotes)?
  - How often do you need them?
- How many products/SKUs do you have?
- 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?

# Products

SCOPING QUESTIONNAIRE



# 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 forecasting?
  - Is the hierarchy consistent across the organization?
  - At what level of the product hierarchy will you import/input data for analysis?
- Do you forecast for every product, or a subset of products?

# Users

SCOPING QUESTIONNAIRE

## SCOPING QUESTIONNAIRE

# 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 SSO? Or else?
- What level(s) of hierarchies should the permission be granted?

# User Interface

SCOPING QUESTIONNAIRE

# 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

SCOPING QUESTIONNAIRE

# 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?