Deal Desk & Pricing Optimization

Anaplan

Epic: Deal Evaluation

User Story Title: Compare Blended Margin for Product to Threshold / Target

Who? Deal desk analyst

What? Review each deal scenario and its blended margin for product to threshold / target

Why? To ensure profitability of the deal

How? Build a dashboard where all deals can be reviewed and details of the product can be viewed by drilling into its deal details

Description:

As a deal desk analyst, I need the ability to set rules to determine margin threshold. Rules could be set by SKU, product line, business unit, and pricing category. When viewing blended margin for product, there should be a field that shows the margin threshold for product margin and if product margin violates that threshold it will be flagged.

This is a critical request, and I will know it is achieved when I have a dashboard to review flagged product in a deal and drill into its deal details.

Complexity Estimate: Medium

Level of Effort Estimate: Low

Sprint Cycle: Sprint 1

Sprint Points Assigned: TBD

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Epic: Manage Approval Rules

User Story Title: Define Key Drivers that Map to Workflow

Who? Deal desk analyst

What? Override my team's Forecast sales number at the aggregate level or the top level of account, opportunity or product

Why? To quickly ensure my forecast is accurate based on my judgment of my team's expected performance while maintaining the information provided by my sales representatives

How? Build a dashboard where all opportunities in my territory can be reviewed and can be adjusted as needed

Description:

As a deal desk analyst, I need to be able to map deal size drivers to specific user groups and approval workflow, so that I can route quotes for approval and facilitate the approval process.

I will know that this critical request is complete when I can review user groups and deals requiring sales manager's approval.

Complexity Estimate: Medium
Level of Effort Estimate: Low

Sprint Cycle: Sprint 2
Sprint Points Assigned: TBD

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Epic: Product Adjustments

User Story Title: Model the Quote with Additional SKUs

Who? Deal desk analyst

What? Iterate on the quote by adding SKUs and making necessary product adjustments, overriding necessary attributes

Why? To model out various pricing scenarios for the deal, optimizing the deal

How? Build a dashboard that pulls in attributes of a product into a deal and allows for modification of SKUs in a quote

Description:

As a deal desk analyst, I need to iterate on the quote by adding SKUs and making necessary product adjustments, overriding necessary attributes such as unit cost, total cost, quantity, discount, etc., so that my quote is optimized.

I will know when this critical request is complete when I can iterate on different quote scenarios and generate a final quote that allows for maximum profitability.

Complexity Estimate: Medium

Level of Effort Estimate: Medium

Sprint Cycle: Sprint 2

Sprint Points Assigned: TBD