# Quota Planning & Management

**Anaplan**

**Epic:** Top-down Cascade

**User Story Title:** Global Operations – Top-down Quota

**Who?** Global sales operations or finance team member

**What?** Cascade top-level regional sales target down to territory hierarchy based on the leaf count, historical performance or other methodology

**Why?** Initiate quota process by distributing financial revenue bookings targets through the territory hierarchy

**How?** Via Anaplan-native hierarchy relationships in the calculation engine

**Description:**

As a global sales operations or finance team member, I can cascade top-level regional sales target down to territory hierarchy based on the leaf count, historical performance or other methodology, so I can initiate quota process by distributing financial revenue bookings targets through the territory hierarchy.

This is a critical request, and I will know it's achieved when I can review cascaded targets at all levels of the territory hierarchy.

Data Inputs:

- Global sales target

- Historical bookings data or other cascade methodology (e.g., finance forecast, etc.)

**Complexity Estimate:** Low

**Level of Effort Estimate:** Low

**Sprint Cycle:** Sprint 1

**Sprint Points Assigned:** TBD

# Quota Planning & Management

**∧naplan**

**Epic:** Quota Planning Assumptions

**User Story Title:** Quarterly Seasonality Inputs

**Who?** Sales operations team member

**What?** Enter or review quarterly seasonality percentages by area, region and district

**Why?** Enable system-generated quota to be set by quarter

**How?** Differentiate quarterly seasonality percentages by area, region and district

**Description:**

As a member of the sales operations team, I can review and leverage historic seasonality in the platform and use the historic seasonality or enter my own seasonality, so I can enable system-generated quota to be set by quarter.

This is a critical request, and I will know it's achieved when I can enter quarterly seasonality percentages by area, region and district.

Data Inputs:
- Historical bookings data by region, district, area, and product

**Complexity Estimate:** Low

**Level of Effort Estimate:** Low

**Sprint Cycle:** Sprint 1

**Sprint Points Assigned:** TBD

# Quota Planning & Management

**∧naplan**

**Epic:** Bottom-up

**User Story Title:** Sales Manager – Bottom-up Quota

**Who?** Sales manager

**What?** Review, edit and validate sales quotas that came from top-down cascade calculation based on assumptions

**Why?** Ensure that local knowledge is incorporated in the system-generated quota recommendations

**How?** Review and capture manual inputs as necessary

**Description:**

As a sales manager, I can review, edit and validate sales quotas that came from top-down cascade calculation based on assumptions, so I can ensure that local knowledge is incorporated in the system-generated quota recommendations.

This is an improvement from the Excel process because it will allow me to review assumptions and make changes in the single source of truth, so that my input is immediately reflected in the proposed quota plan.

This is a critical request, and I will know it's achieved when I can go into the system, and review and override quota in my sales region.

Data Inputs:

- Historical bookings data
- Pipeline bookings data
- Financial targets

**Complexity Estimate:** Medium
**Level of Effort Estimate:** Low

**Sprint Cycle:** Sprint 2
**Sprint Points Assigned:** TBD