



Scoping Questionnaire

SALES FORECASTING

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)?
- What is the current forecasting cycle/cadence?
- Does your organization have overlay specialists?
 - How are they structured? (e.g. product overlay specialists, etc.)
 - Are they engaged in the forecast? If so, how?

Forecasting Process

SCOPING QUESTIONNAIRE

Forecasting Process

- How frequently do you currently forecast?
- What is your current workflow for committing deals or making adjustments?
- What is the sequence of approvals of a forecast?
- What is the current review process of your sales forecasts?
- What information or data points do you use to support your sales forecasts?
- How do you inform and track deal slippage and pull-forward? Do you inform and track those at a deal level or territory level?

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 products need to be forecasted? What is your expected product growth in the next 1 to 3 years?
- How many years of historical data is needed for trending analysis?
- How many future periods do you need to forecast?
- How granular does the forecasting timescale need to be (e.g., quarter, month, week)?
- Do you require versioning (snapshots) 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, adjustments)?
 - How often do you need them?
- How are accounts / opportunities assigned to reps?
- 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

- 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?