

STANDARD USER STORIES

Account Segmentation & Scoring

Anaplan

Epic: Account Segmentation

User Story Title: Set Up Account Segmentation Rules

Who? Sales operations team member

What? Review and define rules that drive how accounts should be segmented

Why? Align sales force to key accounts and ensure company strategy is reflected in how you go to market, and better define territory coverage based on intelligent market opportunities

How? By defining cohort bands to apply to the account base

Description:

As a sales operations team member, I need the ability to review and define rules that drive how accounts should be segmented, so that I can align sales force to key accounts and ensure company strategy is reflected in how we go to market, and better define territory coverage based on intelligent market opportunities.

This is a critical request, and I will know it's achieved when I can review the resulting accounts assigned to segments.

Data Inputs:

- Detailed account attributes

Complexity Estimate: Medium

Level of Effort Estimate: Low

Sprint Cycle: Sprint 1

Sprint Points Assigned: TBD

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Account Segmentation & Scoring

Anaplan

Epic: Account Scoring

User Story Title: Set Up Account Scoring Rules

Who? Sales operations team member

What? Review and define rules that drive how accounts should be scored

Why? Quantify potential revenue contributions from each account based on attributes that drive revenue for the company

How? By defining factors that drive revenue and applying weights to those factors

Description:

As a sales operations team member, I need the ability to review and define rules that drive how accounts should be scored, so that I can quantify potential revenue contributions from each account based on attributes that drive revenue for the company.

This is a critical request, and I will know it's achieved when I can review the calculated account potential.

Data Inputs:

- Detailed account attributes

Complexity Estimate: Medium

Level of Effort Estimate: Low

Sprint Cycle: Sprint 2

Sprint Points Assigned: TBD

STANDARD USER STORIES

Account Segmentation & Scoring

Anaplan

Epic: Reporting

User Story Title: Review Dashboard

Who? Sales operations team member

What? Review segmentation and KPIs by the territory and/or account hierarchy

Why? Analyze areas that support decision-making while planning territories and quotas

How? By reviewing dashboard that is set up with key metrics by accounts and territories

Description:

As a sales operations representative, I need the ability to review segmentation and potential KPIs by the territory and / or account hierarchy, so that I can analyze areas that support decision-making while planning territories and quotas.

This is a critical request, and I will know it's achieved when I can see a dashboard that summarizes key metrics by market segment and sales regions.

Complexity Estimate: Medium

Level of Effort Estimate: Low

Sprint Cycle: Sprint 3

Sprint Points Assigned: TBD