Scoping Questionnaire

TERRITORY PLANNING & MANAGEMENT

Anaplan

Sales Organization

SCOPING QUESTIONNAIRE

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Sales Organization

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- ☐ 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)?
    - ☐ Do you have channel territories?
        - ☐ How many levels are in this hierarchy?
        - ☐ Is the channel hierarchy balanced or ragged (i.e., does it skip levels)?
- ☐ How do you currently track individuals moving throughout the year, especially when managing assignments?
    - ☐ Does your planning process require accommodating movements, or is reporting the primary requirement?
- ☐ What is the current planning cycle/cadence?
- ☐ Does your organization have overlay specialists?
    - ☐ How are they assigned (i.e., geo, industry, products, etc.)?

Account & Territory Assignment

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Account & Territory Assignment

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- ☐ What attributes determine territories?
- ☐ How are territories assigned?
- ☐ Do you assign territories to people, people to territories, or both?
- ☐ Do you assign accounts to people or territories, or both?
- ☐ Do you plan by products? How is this planned?
- ☐ How do you optimize or balance your accounts (i.e. by bookings, by available sales reps, etc.)?
- ☐ Do you regularly rebalance territories? If so, how often?
- ☐ How are new hires assigned to a territory?
- ☐ Do you need to plan for 'To-Be-Hired (TBH)' headcount?
  - ☐ If so, how do you transition a 'TBH' to a real person?
- ☐ Could territories be transferred in whole between individuals?
  - ☐ Is there an established territory/account transfer process?
- ☐ Are there team assignments?
  - ☐ How do these function?

- ☐ Can anyone (any level) in the hierarchy have an assignment?
- ☐ Do you use rule engine to assign accounts to territories, or any other logical account-to-territory baseline?
- ☐ How do you handle global accounts?
- ☐ What are the downstream account reporting requirements?
- ☐ What are the downstream territory reporting requirements?
- ☐ What downstream territory management hierarchies are there?
- ☐ In what currencies do you capture your bookings and TAM? Do you need to show both local and constant currencies?

Products

SCOPING QUESTIONNAIRE

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Products

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

Data

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Data

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- ☐ How many people, managers, and quota-carrying reps are in your sales hierarchies?

- ☐ How many accounts need to be planned? What is your expected account growth in the next 1 to 3 years?

- ☐ How many products need to be planned? What is your expected product growth in the next 1 to 3 years?

- ☐ How many years of historical data is needed?

- ☐ How many future periods do you need to plan?

- ☐ How granular does the timescale need to be (e.g., year, quarter, month, week)?

- ☐ Do you require versioning of all or part of your data set?

  - ☐ If so, how many versions do you need?

- ☐ What data extracts do you expect (e.g., rep account assignments, territory hierarchy report, etc.)?

  - ☐ How often do you need them?

- ☐ 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?

- ☐ What is your current process and frequency around adding new accounts to the planning system?

Users

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Users

Anaplan

- [ ] 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 Single Sign-On (SSO)? Or else?
- [ ] What level(s) of hierarchies should the permission be granted?

User Interface

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User Interface Design

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- ☐ 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

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Other Considerations

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- ☐ 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?