

STANDARD USER STORIES

Territory Planning & Management



Epic: Territory Planning Data

User Story Title: Import sales hierarchy from the CRM

Who? Sales operations team member and/or data integration specialist

What? Synchronize the sales hierarchy fed from the CRM and make changes

Why? To make sure the Territory Plan is based on the latest hierarchy

How? Import sales hierarchy from the CRM and build administrative dashboard to make synchronization easy

Description:

As a sales operations team member, I need the ability to synchronize the sales hierarchies between the CRM and Anaplan's Territory Planning and Management model.

This is a critical request, and I will know it's achieved when I can validate that the hierarchies are the same between both systems through the admin dashboard.

Import sales hierarchy from the CRM and build administrative dashboard to make synchronization easy.

Complexity Estimate: Medium

Level of Effort Estimate: Low

Sprint Cycle: Sprint 1

Sprint Points Assigned: TBD

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Epic: Rep Assignment

User Story Title: Direct Rep-to-Territory Assignment

Who? Sales operations team member

What? Assign a direct rep to selling territory in Anaplan based on appropriate attributes

Why? To achieve appropriate coverage of sales territories

How? Consider territory attributes and sales rep attributes to optimize coverage

Description:

As a sales operations team member, I can assign the appropriate direct rep to a selling territory by ensuring reps' skill sets are aligned with territory potential.

This is an improvement from the Excel process because it will incorporate additional relevant account data and give me a complete picture of the territories.

This is a critical request, and I will know it's achieved when I can go into Anaplan and assign a direct rep to a territory.

Data Inputs:

- Sales rep skill set (e.g., hunter / farmer, historic attainment, etc.)
- Territory TAM and SOW (share of wallet)
- Account attributes (e.g., segmentation, industry, etc.)
- Historical account assignments (based on previous year bookings data)

Complexity Estimate: Low

Level of Effort Estimate: Medium

Sprint Cycle: Sprint 2

Sprint Points Assigned: TBD

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Anaplan

Epic: Hierarchy Modeling

User Story Title: Approval of New Sales Planning Hierarchy

Who? Regional vice president

What? Review and approve new sales planning hierarchy

Why? Ensure all new or changed territory considerations are reflected in the sales planning hierarchy

How? Dashboard with summarized list of new and/or changed territories to review and approve

Description:

As a regional vice president, I need the ability to quickly review the summary of new and changed territories in my sales region. I need the ability to approve, reject, or ask for additional changes.

This is an improvement from the current Excel process, because I can see the single source of truth in a collaborative platform and provide real-time feedback in that single source of truth.

This is a critical request, and I will know it's achieved when I can go into Anaplan and see the changes and feedback are reflected.

Data Inputs:

- Historical bookings data
- Pipeline bookings data
- Territory TAM and SOW (Share of Wallet)

Complexity Estimate: Medium

Level of Effort Estimate: Low

Sprint Cycle: Sprint 3

Sprint Points Assigned: TBD