



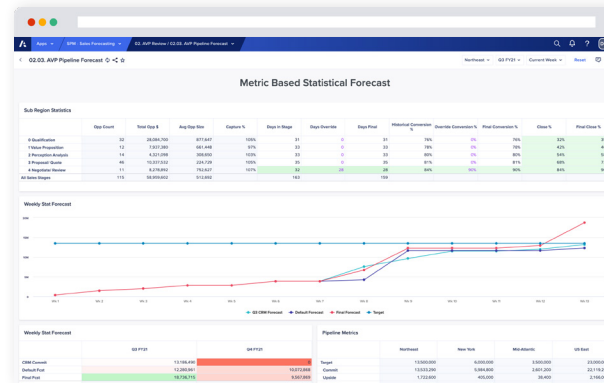
SALES FORECASTING

Anaplan for Sales

Sales Forecasting by Anaplan provides sales leaders the ability to deliver more accurate revenue projections, and to be faster and more agile in their forecasting approach. Anaplan can quickly perform complex calculations on the fly based on real-time data to ensure more reliable projections and predictable revenue. Equipped with these insights, you can reduce forecasting risk and optimize your pipeline to keep your team focused on strategic and winnable opportunities.

Key benefits

- Provides an accurate, trusted, real-time sales forecast and data-driven insights to enable improved decision-making.
- Helps develop a sales forecast benchmark from historical sales performance, trends, seasonality, and third party-sourced intent data.
- Removes bias from sales projections and builds trust with reliable, actionable information.
- Reduces sales pipeline and forecast risks while aligning with sales quotas and revenue expectations.



- Reduces cycle times and time spent planning territory coverage and setting quota assignments.

There's a better way to plan

As a purpose-built platform connecting people, data, and plans, Anaplan delivers a unified real-time, cloud-based environment to optimize planning and democratize decision-making across all lines of business and business activities, from strategic to operational levels. Leveraging the speed and scale of the platform, Anaplan offers businesses a nimble, intuitive, and secure way to collaborate concurrently to drive faster and more accurate decisions.

Customer Story

DocuSign

As DocuSign expanded across the globe, its sales forecasting became difficult to scale. Manual forecasting processes combined with data from disparate systems led to inefficiency and inconsistency.

Using Anaplan, DocuSign created a more consistent forecasting process and de-risked its process by dramatically reducing data gaps.

- Better alignment between Sales and Finance, with reliable sales forecasts
- De-risked sales forecasting, with fewer missed targets
- Decreased need for data consistency and integrity checking, allowing for more time driving data-driven decisions

“No one has to worry about when was the data pulled, and whether you are stitching together two different data sets Those pains are actually gone.

Jeremy Scheffel

Senior Director of Sales Performance Intelligence Team, DocuSign

Key features and capabilities

Maintain an accurate and trusted sales forecast

- Quickly review pipeline potential and increase sales rep accountability while spotting “sandbagging” and “overcommit” behaviors.
- Sustain and share an accurate and up-to-date forecast from one place.
- Develop sales forecasts by geographic locations, product lines, and accounts, or change any of these dimensions.
- Create sales forecasts based on qualitative, time series analysis and projection, and causal modeling techniques, while comparing the degree of certainty with the sales forecast accuracy and predictability.

Conduct scenario modeling and analysis

- Create “what-if” analyses and scenario modeling to assess the impact to the sales forecast.
- Project the revenue impact for a specific business, economic, or competitive situation were to occur.
- Prepare for challenges that you may encounter in your upcoming deal cycles.
- Execute sales forecast simulations and outcomes.
- Make changes to drivers and execute sales forecast simulations to project future impact on sales performance.

Optimize your pipeline with Predictive Insights

- Make better predictions with Anaplan’s proprietary AI technology that gathers predictive insights and buyer intent data on accounts in your pipeline.
- Create actionable recommendations to help your team pursue only the best opportunities.
- Understand which accounts are ideal candidates for up-sell and cross-sell opportunities.

- Identify new territories and industries for market growth and expansion.

Analyze trends, changes, and patterns in the sales forecast over time

- Analyze the sales forecast and sales performance at any level of granularity — e.g., by state/city, product SKUs, or a group of accounts in a selected vertical.
- Develop time-based dashboards and key performance indicators (KPIs), such as velocity calculations, trending analytics, and seasonality fluctuations.
- Apply easy-to-use formula builder to configure forecasting models.
- Built-in dashboards, reporting, and analytics with data visualization (charts, graphs, maps, etc.).
- Maintain history of sales forecast through effective dating, versions, and audit tracking.

Support data integration to external solutions and data sources

- Leverage customer relationship management (CRM) data including accounts, opportunities, and other objects to feed forecast models and build a more accurate view of the pipeline.
- Integrate with any upstream or downstream system using pre- built connectors, third-party connectors (e.g. Mulesoft, Dell Boomi, SnapLogic, and Informatica) or self-service import and export with Excel.
- Utilize integrations with Microsoft Office™ Excel®, Word®, and PowerPoint® to provide productivity and efficiency when delivering presentations or reviewing sales forecast in sales meetings.

Key features of the Anaplan platform

- **“What if” scenario and multi-dimensional modeling**, powered by our patented Hyperblock® calculation engine, produces ultra-fast calculations at unprecedented scale so you can anticipate market changes.
- Built-in dashboards, reporting, and analytics with data visualization provide **a single source of truth** on business performance.
- **Collaborative and agile planning** across Sales, Finance, Supply Chain, HR, Marketing, and other business units.
- Best-in-class **security and compliance** with role-based access control, user management, SSO support with SAML 2.0 compliance, and data encryption.
- Highly extensible ecosystem **collects and analyzes data** in a single location using APIs, ETL connectors, and built-in integrations with other solutions.



About Anaplan

Anaplan, Inc. (NYSE: PLAN) is a cloud-native enterprise SaaS company helping global enterprises orchestrate business performance. Leaders across industries rely on our platform—powered by our proprietary Hyperblock® technology—to connect teams, systems, and insights from across their organizations to continuously adapt to change, transform how they operate, and reinvent value creation. Based in San Francisco, Anaplan has over 20 offices globally, 175 partners and approximately 1,500 customers worldwide.

