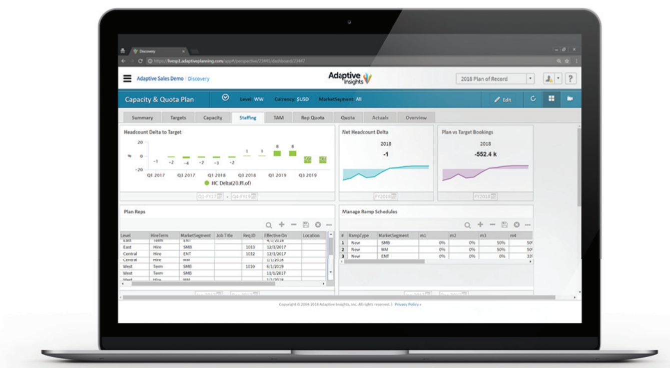
Data Sheet

Adaptive Insights
A Workday Company

# Adaptive Insights for Sales

In today's fast-moving world, sales teams need to respond instantly to changes in the market. Adaptive Insights for Sales helps you quickly optimize resources, increase sales performance and improve sales predictability. Automatic integration with corporate plans gives you insight into functional interdependencies and the ability to forecast with greater accuracy so you and your whole business can make smarter decisions faster.



Build detailed sales capacity and staffing plans

## Improve Sales and Predictability

The business can deliver better, more predictable performance if:

- **Sales** can run real-time 'what if' and gap analysis around ramping, staffing & attainment to efficiently deploy quota
- **Sales** can construct balanced territories to optimally deploy the sales force
- **Finance** can link the sales and core financial models in a single, integrated environment to run holistic scenarios

### Set Sales Targets with Ease

Setting sales targets begins with a top-down allocation of corporate targets received from finance. High level targets flow seamlessly from your finance model and are split across time, region, product and other market segments that are relevant to your company's go-to-market strategy. Over-assign targets at the manager and rep level to provide cushion or coverage relative to your financial plan.

### Track Processes Collaboratively

- Facilitate and monitor consolidation processes to increase accountability
- Define deliverables, assign them to users, monitor their status, and track their closure
- View task statuses with at-a-glance graphs that automatically update

### Plan Staffing, Ramping, and Attrition

Build detailed bottoms-up staffing plans to model planned rep hires, ramping schedules and attrition. A flexible, intuitive dashboard interface enables you to run 'what-if' scenarios in real-time. Analyze coverage and gaps to target. Add headcount, push out hire dates, change ramping assumptions, plan for attrition and see the capacity impacts in real time.

### Get Quotas Just Right

Too high and reps become disillusioned, too low and you won't get the growth you need. Don't get stuck sending quota letters for a plan that won't work. Use flexible templates to input and manage quotas by rep or by role. Visually monitor coverage in real-time to ensure enough quota has been deployed to hit targets. Track performance by rep to see forward assumptions in the context of historical actuals from your CRM system.

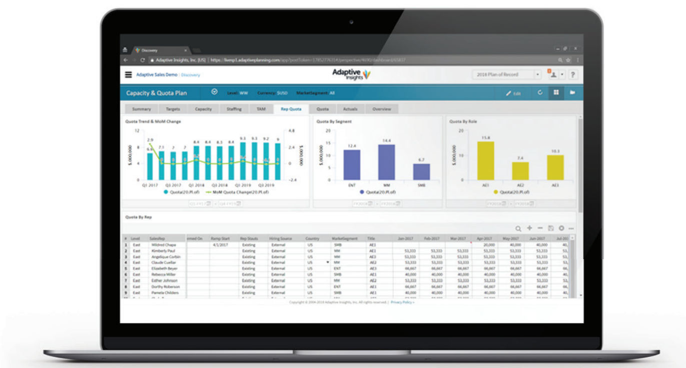
### Create Balanced Territories

Carve up and optimize territories to ensure every rep can support their quota. Import TAM, lead, opportunity and customer data sets from CRM and marketing automation systems. Segment and score your market by geo, company size, vertical and product attributes. Assign territories to reps via named accounts or by geo/segment, then analyze and optimize for balance.

"When you get to the final stages of planning and try to eke out additional EBITDA or revenue growth, you need an integrated tool that enables you to see the impact of changing a single variable has on the rest of the business."

**– MARK CHAMBERLAIN, VP SALES OPERATIONS, IVANTI**

Balance and optimize territory assignments



Plan quotas by rep or by segment

### Compare Scenarios and Actuals

Planning is iterative. Run scenarios, compare assumptions and results between plans to answer "What changed?" Ensure that plan assumptions are grounded in historical experience and identify gaps and risks. Track performance versus actuals by rep and by segment real-time so you can course correct fast enough to impact results.

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