



Workday Adaptive Planning for sales.

To keep up with the fast pace of change in today’s business world, sales operations and leadership teams need better tools for planning and analysis. Sales teams need a robust solution that will help improve planning accuracy and processes, and grant insight into functional interdependencies. With Workday Adaptive Planning, organizations can build better, more integrated plans in a single technology platform.

Design a sales planning process that can scale with the needs of your sales organization.

With Workday Adaptive Planning, you can collaborate seamlessly across the organization to quickly and easily set targets, optimize resources, deploy effective quotas, and design balanced territories. With better planning, you and your entire business can make smarter decisions faster.



Set sales targets and align with finance.

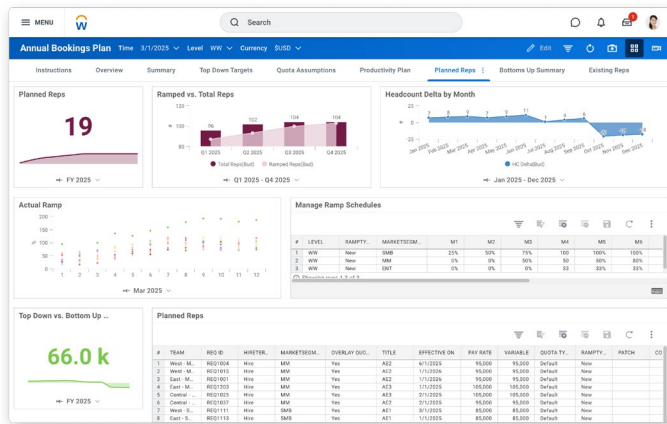
Allocate top-down targets throughout your sales organization across time, region, product, and other market segments that are relevant to your company’s go-to-market strategy. Over-assign targets at the manager and rep level to provide coverage and mitigate risk relative to your corporate plan.

Build detailed sales capacity and staffing plans.

Plan for staffing, ramping, and attrition across the sales organization with detailed bottom-up staffing plans. Flexible, easy-to-use dashboards in Workday Adaptive Planning enable you to run what-if scenarios in real time. Analyze coverage and gaps to target, add headcount, adjust hire dates, change ramping assumptions, and plan for attrition—all while seeing the impact on your sales capacity plan in real time.

Key Benefits

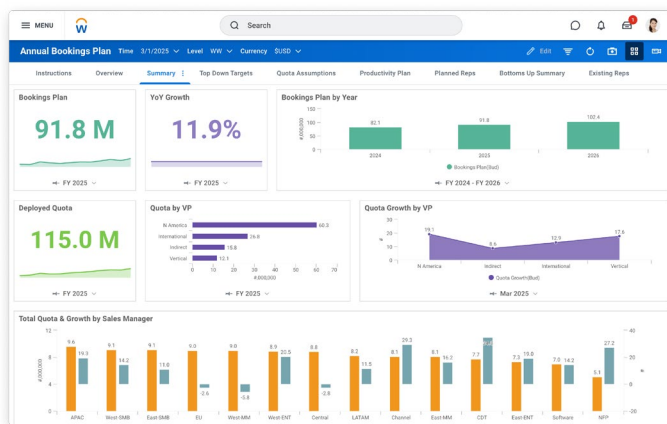
- Improve sales productivity and predictability with equitable, data- driven quotas
- Distribute sales targets across your organization while aligning with corporate goals
- Design balanced territories through account and territory scoring, account segmentation, and territory carving across geographic, segment, or industry lines
- Deploy the right reps in the right territories, anticipate expenses, and close coverage gaps
- Conduct frequent forecasting, improve visibility, and streamline planning processes
- Optimize your go-to-market strategy with what-if analysis
- Take action quickly with embedded, real-time analytics



Build detailed sales capacity and staffing plans.

Analyze, create, and manage quotas.

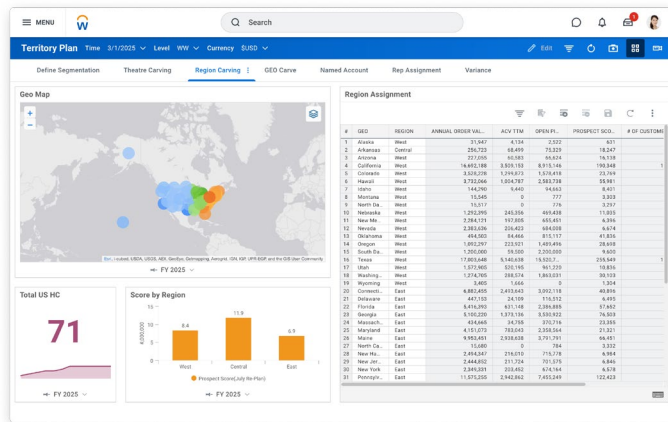
When quotas are too high, reps become unmotivated; too low, and you won't get the growth you need. Instead of sending quota letters for a plan that won't work, use flexible templates to input and manage quotas by rep, role, or segment. Visually monitor quota coverage in real time to ensure there's enough to hit targets. Track performance by rep to see forward assumptions in the context of historical actuals from your CRM system.



Plan equitable quotas for your entire sales team.

Design optimized sales territories.

Workday Adaptive Planning enables you to 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, and vertical and product attributes. Distribute accounts to territories via explicit named assignment, geographical or segment rules, or any combination of factors. Score the strength of accounts and territories to ensure that each sales territory is targeted, balanced, and successful.



Balance and optimize territory assignments.

Significant value for sales and sales operations teams.

Compare scenarios and actuals.

Planning is iterative. With Workday Adaptive Planning, you can stage multiple scenarios in real time and compare assumptions and results between plans. Ensure that plan assumptions are grounded in historical experience, and identify gaps and risks. Track performance versus actuals by rep and by segment in real time so you can course-correct fast enough to impact results.

Improve sales performance and predictability.

With what-if and gap analyses around ramping, staffing, and attainment in order to efficiently allocate quota, you can confidently create plans that your sales team can get behind. Drive visibility and productivity across your sales organization through streamlined sales forecasting and pipeline analytics. With Workday Adaptive Planning, designing optimized, balanced territories to effectively deploy the sales force becomes an exercise rooted in insights, not instincts.

Track processes collaboratively.

Facilitate and monitor processes to increase efficiency and accountability across the sales organization. Define planning deliverables and then assign them to users, monitor their status, and track their closure. View the status of tasks with at-a-glance graphs that automatically update so you can keep your planning efforts on track. Sales, finance, HR, and other areas of your organization can plan in a single integrated technology platform to run holistic planning scenarios.

Visit us online to learn more: [sales planning](#)



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