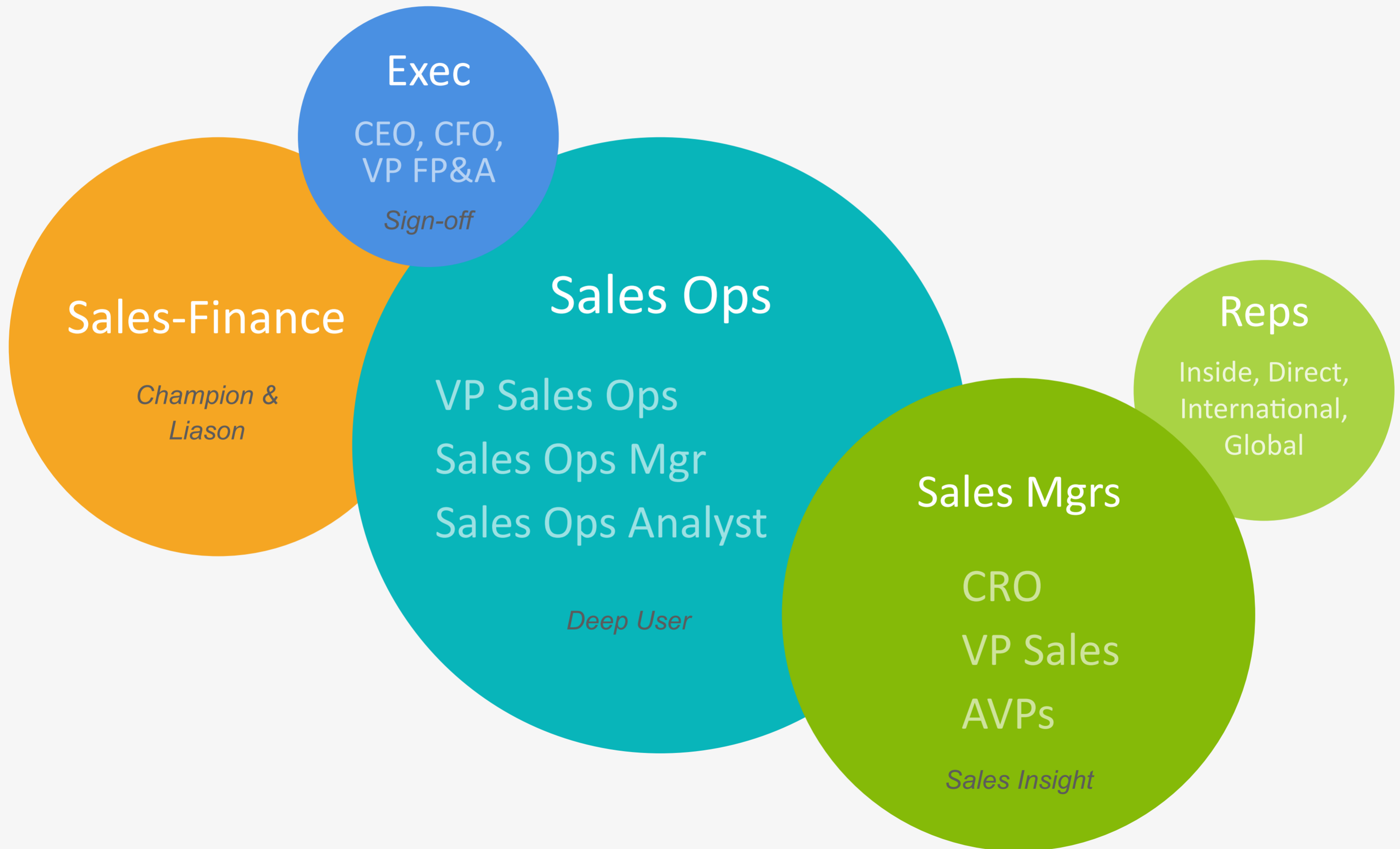


# Sales Planning: Personas & Processes

May 2017

1. Personas
2. Processes
3. Planning Steps
4. Forecasting
5. Tasks by role
6. Data flow

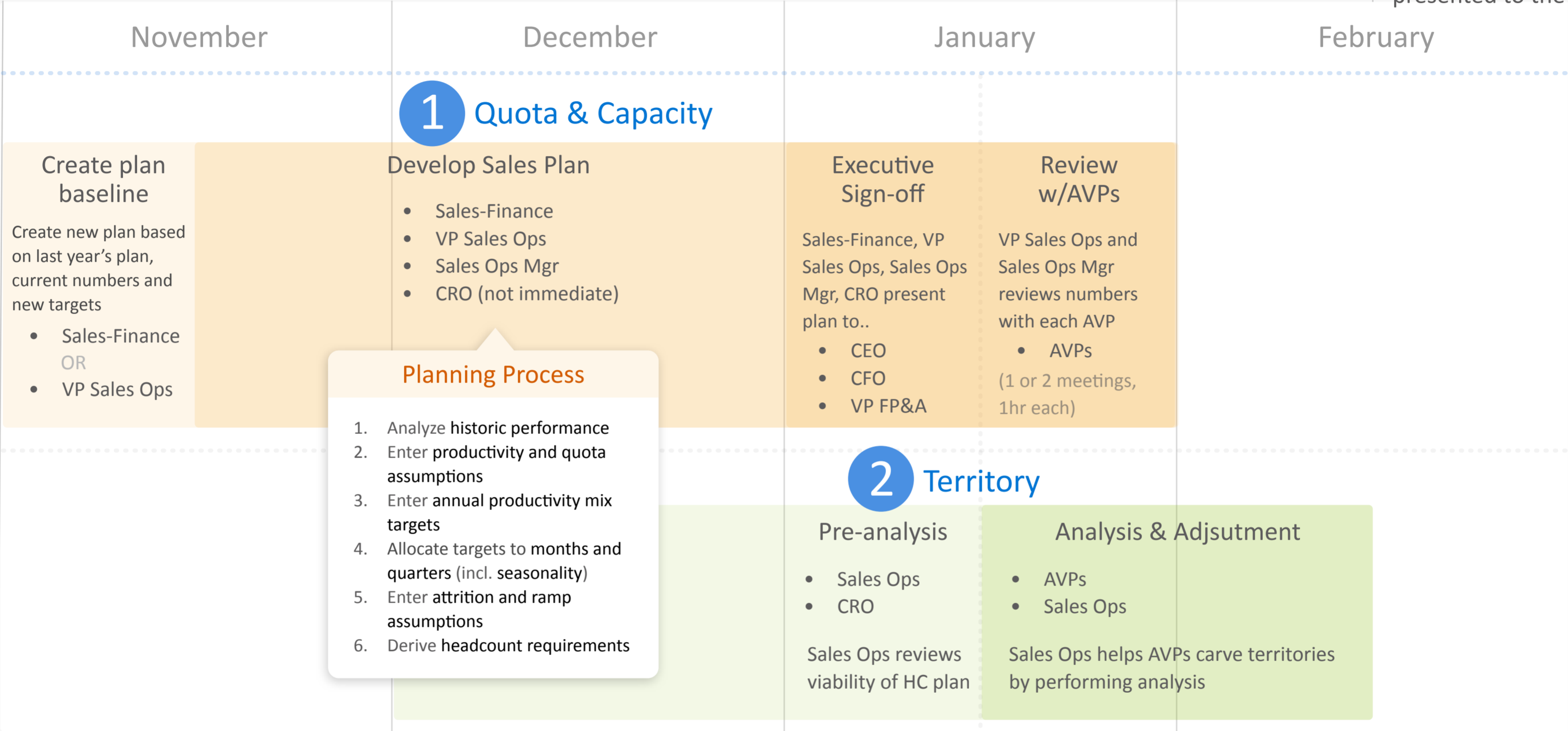
# Personas



# Processes

Fiscal Year 2017

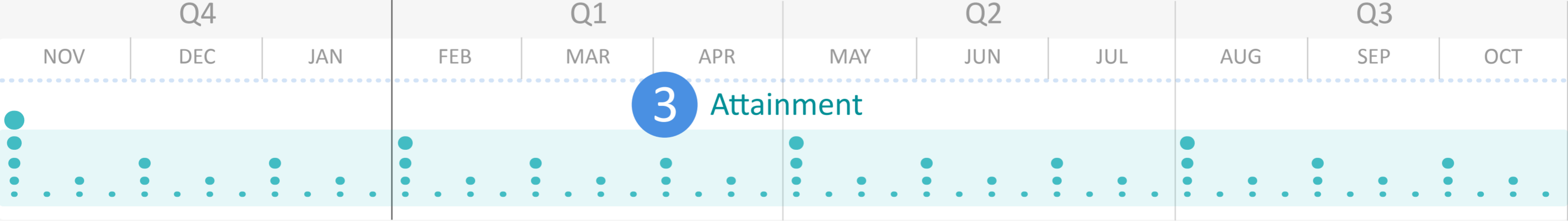
Plan is locked and presented to the Board



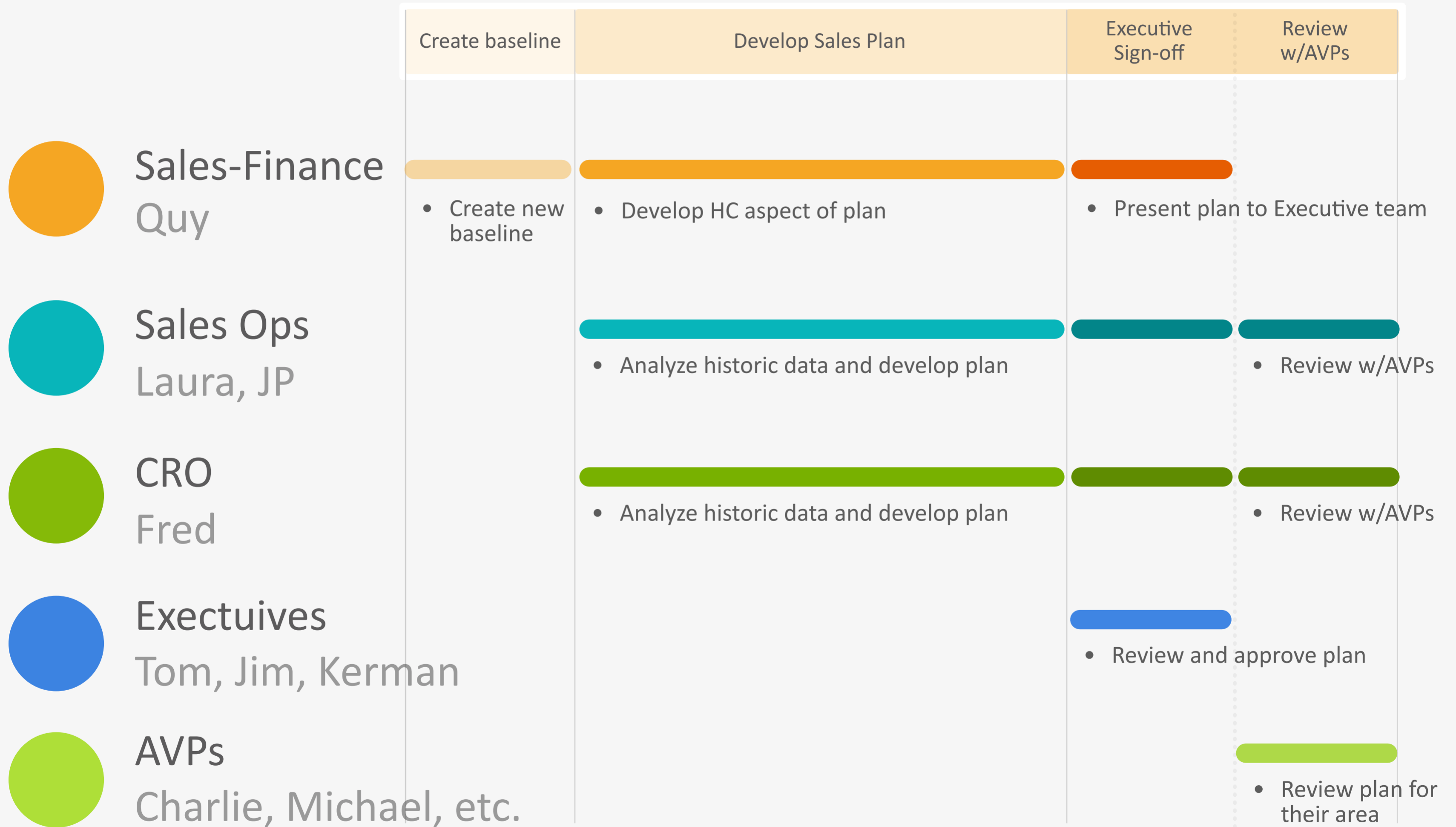
**Planning Process**

- Analyze historic performance
- Enter productivity and quota assumptions
- Enter annual productivity mix targets
- Allocate targets to months and quarters (incl. seasonality)
- Enter attrition and ramp assumptions
- Derive headcount requirements

Fiscal Year 2017



# Personas: Quota & Capacity Planning



# Personas: Territory Planning



Sales Ops  
Laura, JP



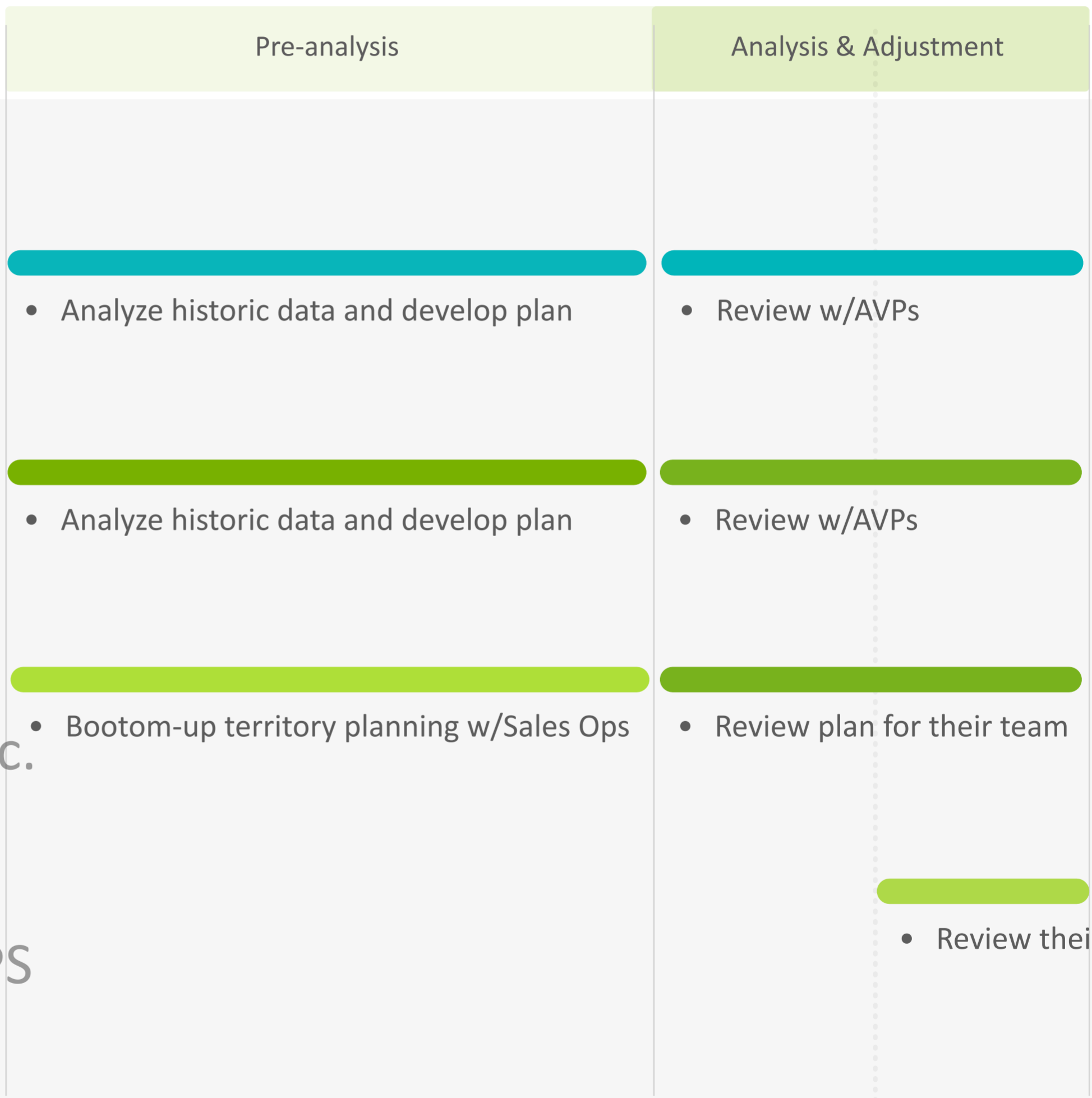
CRO  
Fred



AVPs  
Charlie, Michael, etc.



Reps  
Field Sales, CSMS, PS



# Planning Steps: Create and Develop Plan

## Plan Owner—Create and develop new plan

1. Create new plan for next year (based on current plan)
2. Enter new bookings targets and examine exceptions
3. Analyze historic data and modify assumptions
  - Territory—market distribution across TAM, leads, opportunities, and customers by geo, segment, AVP to inform staffing
  - Staffing—YOY staffing metrics, including adds, terminations, transfers in/out
  - Ramp—plan-actual ramp performance and 2017 ramp assumptions by segment and AVP
  - Modify Ramp assumptions
  - Productivity and Quota—productivity and quota assumptions in 2017 plan by segment and AVP
  - Modify Productivity and Quota assumptions
  - Seasonality—plan-actual seasonality in 2017
5. Review and get sign-off from Executive team
6. Review with each AVP
7. Lock plan-of-record and present to the Board

# Forecasting (Winshuttle)

## 1. Weekly—Pipeline growth and quality

By rep and region, month-over-month, year-over-year

## 2. Bi-monthly—Forecast

Rep and director forecasts, quota attainment, regional quota coverage

## 3. Monthly—Bookings, Opportunity forecast analysis, Sales rep productivity

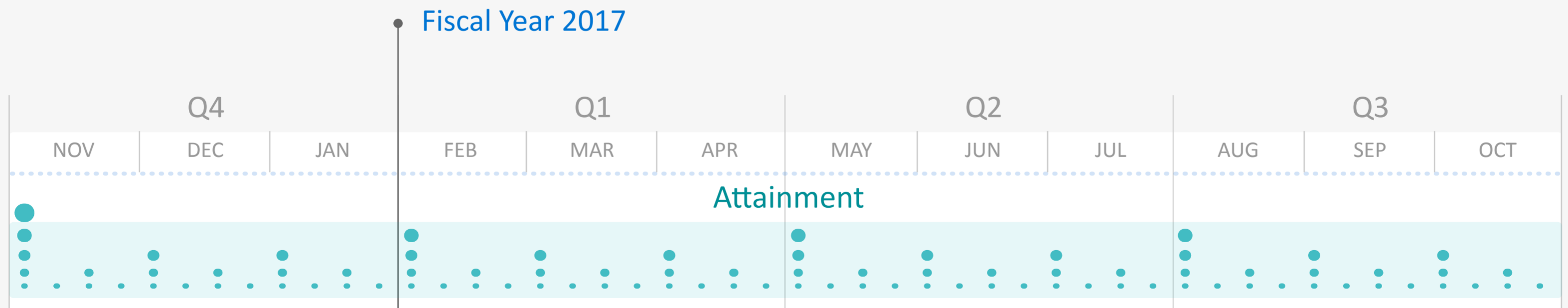
Closed sales w/rep detail, pipeline and 'most likely' variance, capacity plan and variance, ramp assumptions

## 4. Quarterly—Sales productivity forecast, Win-loss analysis

Cohort analysis, Sales capacity forecast and gap analysis, Pipeline close rates by type, product and stage

## 5. Annually—Product attach rates, Capacity and productivity planning

Sales planning by product attach rates, inc. maintenance and services, Seasonality, YoY capacity analysis an planning



# Tasks by Role

Weighted by significance (task volume, task significance/demo-ability, and role significance)



Sales-Finance



Sales Ops



Sales Leaders



Exec Staff



AVPs

	Sales-Finance	Sales Ops	Sales Leaders	Exec Staff	AVPs
Develop planning model	X Prof. Serv.	X			
Create new plan (baseline)	X Entry point	X			
Analyze historic performance	X	X	X		
Adjust levers (assumptions)		X	X		
Create and manage scenarios		X 25+	X		
Lock plan-of-record, publish, and share	X	X			
Territory analysis		X	X		X
Territory carving		X	X		X
Track attainment, reforecast	X	X	X		X
Presentation, reporting	X	X	X	X consumer	X



# Data Flow

External

SFDC

- Opportunities
- Customers
- Logos

Paylocity

- Headcount

SFDC/  
(other)

- TAM
- Leads
- Industries
- Channels
- Segments

Internal

Adaptive  
Finance

- Personnel
- Expenses
- Revenue/bookings

Adaptive  
Reporting

- Plan Summary
- AVP review
- Weekly Review



Actuals



Current Sales Plan

2017 QCT Plan

Summary,  
Analysis,  
Assumptions

New Sales Plan

2018 QCT Plan

Summary,  
Analysis,  
Assumptions

Plan of Record

2018 QCT Plan

Summary,  
Analysis,  
Assumptions

Forecast

2018 QCT Plan

Summary,  
Analysis,  
Assumptions

