Account segmentation and scoring

Anaplan

With Anaplan for Account Segmentation and Scoring, sales leaders can uncover new market opportunities and identify potential revenue growth. Plan and model account segments at the market, account, or product level. Score and rank accounts within segments to focus your sales team on your best, most profitable opportunities. Analyze your customer's purchasing behaviors to define your sales territories with more precision and appropriately align your sales resources. Set quota targets that can be easily explained and justified to your sales people, and are based on accurate and fair apportionment of opportunities.
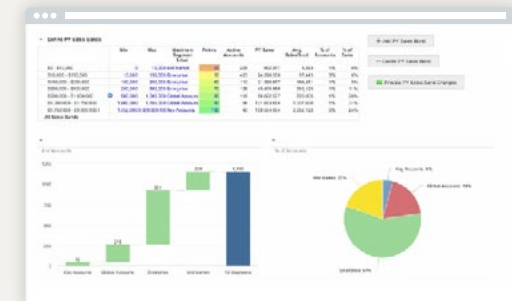
Uncover market opportunity and revenue potential. Know your market. Segment and score opportunities and accounts to uncover market opportunities and revenue potential that might not have otherwise been recognized. Create account segments by any account attribute to allow you to evaluate the value of each account segment in alignment with your corporate objectives.

Allocate and focus sales resources on the best opportunities. Categorize accounts by any number of unique account segments so that appropriate sales resources can be assigned. Accounts can then be scored so that the sales team can prioritize sales activities.

Gain insight to improve sales territory coverage and quota dissemination. Account segmentation and scoring is an integral component to the sales territory and quota planning process. Sales executives and leaders who know the market opportunity and revenue potential by account, as well as the product, can better define sales territories, set quota targets, and assign appropriate sales resources.

Key Benefits

- Analyze account segments to better define sales strategy, provide alignment with corporate objectives, and optimize sales performance in real time

- Segment and score accounts to provide visibility and insight to where you should focus your sales resources

- Improve account assignment ratio to sales representatives capacity to ensure that there is sufficient account service

- Better define sales territory coverage and quota assignments based on intelligent market opportunity and revenue potential

- Use any account attributes such as revenue, size, geographic location, wallet share, number of employees, or industry vertical to define account segments and scoring criteria

Account segmentation is not an exercise that can simply be put on a shelf. Account segmentation requires a view of account and opportunity attributes, as well as the segmentation of accounts that are in alignment with corporate objectives. The insight needs to be deployed to make actionable decisions and plans to realize the benefits.

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Key Features

Configure account segmentation rules Categorize accounts into segments such as "Global Accounts," "Key Accounts," Enterprise Accounts," Mid-Market Accounts," or by unique criteria rules such as "Insurance Accounts with sales revenue > $1B in the east region" or "Retail Accounts with more than 1000 employees who sell building supplies."

Design account scoring rules Score and rank accounts within each account segment to surface which accounts are your best opportunities within each account segment and allow you to set account prioritization with the sales team.

Build account scoring and segmentation rules with familiar formulas Apply easy-to-use, Excel®-like formula builder to configure account segmentation and scoring rules.

"What-if" scenario modeling and analysis Create "what-if" scenarios and modeling to analyze the impact to the sales forecast if a specific business, economic, or competitive situation were to occur. Prepare for challenges that you could encounter in your upcoming deal cycles.

Optimize sales territory definitions and coverage Uncover market opportunity and potential by geographic location, product mix, and account types before defining sales territory definitions and assignments. Optimize fair and equitable territories for the sales team.

Set realistic quotas With an understanding of market opportunity and potential, and territories that are fair and equitable, sales quotas can be set and justified to the sales team.

Determine sales capacity needs Match current sales resources and sales capacity requirements with market opportunity and potential that align with territory assignments.

Support data integration (import and export) Integrate with any upstream or downstream system using a pre-built connector to Salesforce, third-party connectors (e.g. Mulesoft, Dell Boomi, SnapLogic, and Informatica) or self-service import and export with Excel.

Enable MS Office integration Utilize integrations with Microsoft Office™ Excel®, Word®, and PowerPoint® to provide productivity and efficiency when delivering presentations or reviewing performance and metrics in sales meetings.

Analyze account segmentation and scoring with data visualizations Built-in dashboards, reporting, and analytics with data visualization (e.g. charts, graphs, maps, etc.). Dashboards and reports are updated immediately. Analyze account segments and scoring to make better decisions with actionable insights.

Implement top security with reduced IT costs Single, continuously monitored multi-tenant cloud platform and infrastructure. Role-based security, user management, and single sign-on support. Disaster recovery and full data encryption.

Reference and analyze historical data Maintain history of account segments and scoring through effective dating, versions, and audit tracking.

Anaplan for Sales end-to-end solution integration Upstream integration with enterprise systems such as CRM, ERP, and third-party lists such as Dun & Bradstreet data. Downstream integration with Anaplan's Sales Territory and Quota planning app and other Anaplan for Sales apps for a comprehensive end-to-end solution.

About Anaplan

Anaplan is the only scenario planning and analysis platform designed to optimize decision-making in today's complex business environment so that enterprises can outpace their competition and the market. By building connections and collaboration across organizational silos, our platform intelligently surfaces key insights — so businesses can make the right decisions, right now.

More than 2,400 of the world's best brands continually optimize their decision-making by planning with Anaplan.

To learn more, visit www.anaplan.com

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