

A pillar of modern Sales Performance Management:

Your Ultimate Guide for Strategic Sales Planning



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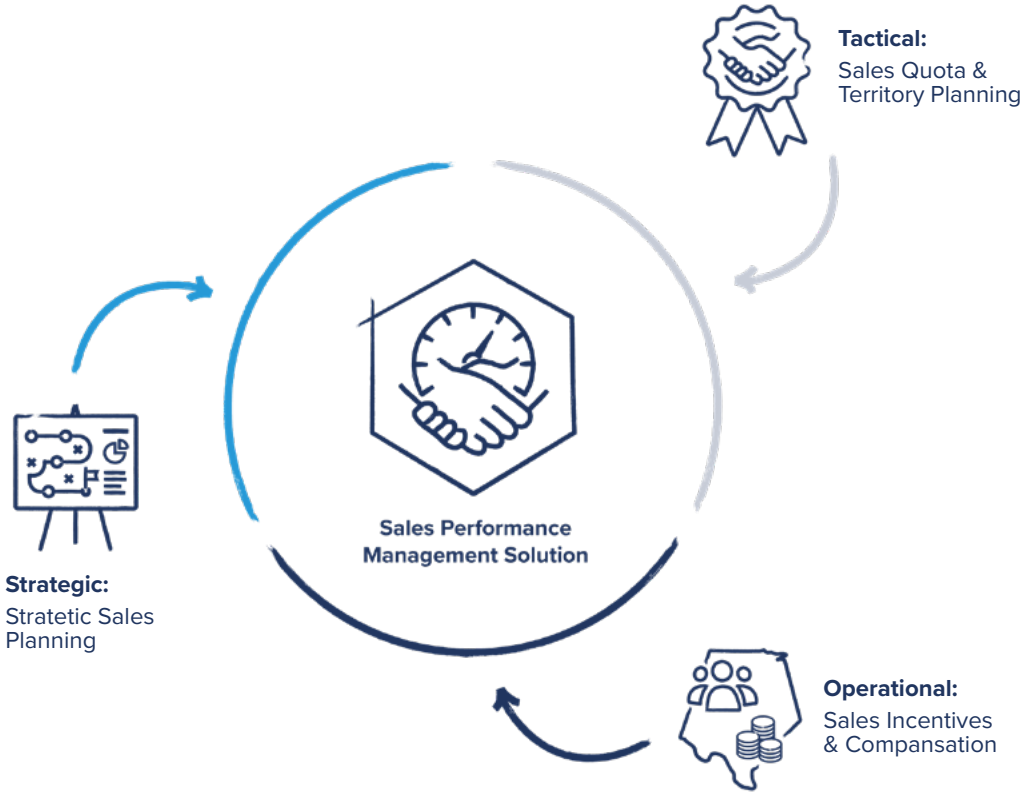
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What to expect in this guide

Immerse yourself in **Strategic Sales Planning** which, along with **Sales Quota & Territory Planning** and **Sales Incentives & Compensation**, is one of the **three key pillars of modern Sales Performance Management (SPM)**.

There is still untapped potential in improving the performance of sales planning strategy. This guide provides a first step toward unified, strategic sales planning to enable sales performance management. Discover the importance of Strategic Sales Planning, the hurdles you will encounter during implementation and how you can transform your Strategic Sales Planning, and a checklist for creating a strategy map. Deepen your understanding of how to link strategic sales planning with SPM.

Learn how to create a valid data basis to make strategic decisions quickly. As an expert on collaborative, unified planning solutions, we will show you how this process can be supported and improve sales planning across your organization.



Unified approach for sales planning domains

Digital planning platform

Strategic Sales Planning

The Impact on Finance, Sales, and IT

On the planning horizon, a distinction is made between strategic, tactical, and operational planning. Strategic sales planning is considered the engine of the sales organization. It defines the fundamental goals of a company within a time horizon of more than five years, so that you know how much horsepower you can put on the road.

The Impact on Finance, Sales, and IT

In addition, strategic sales planning ensures that all sales activities are aligned with corporate goals and coordinated with plans and measures of other corporate divisions. Conscientious top-down planning lays the foundation for a successful go-to-market. It forms the cornerstone for positioning the company on the market in the long term and ensuring sustainable growth.

In the day-to-day business of operational planning and budgeting, where revenues, sales figures, costs and other measurable values determine the path, there is often a lack of alignment with the overarching strategy. The lack of alignment and lack of collaboration between budgeting and sales strategy causes a deficiency in operational excellence that can only be achieved with a clear strategic framework for action. At its best, strategic planning acts as a missing piece of the puzzle, seamlessly aligning with a company's vision, mission and values and providing a clear roadmap.

Strategic sales planning is a holistic and structured process that compresses go-to-market plans with specific sales targets, implementing measures, and continuously tracking a company's overall long-term goals to deliver competitive advantage.

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With Jedox, we now control our reporting and sales planning efficiently and we even get thirsty for more data!

Oliver Dammann – Sales Controlling
MBG International Premium Brands



The challenge of multidimensional complexity

Strategic sales planning often misses the mark for organizations due to one or a combination of three dimensions: Business Complexity, Human Collaboration and Data & Tools. This multidimensional aspect of the company dramatically increases the complexity of the sales planning process and makes it difficult to implement with manual methods and processes.



Business Complexity

From management and customer expectations to strategy changes and market volatility, business success depends on internal and external factors. These interrelationships influence a business and define organizational complexity. Globalized markets, technological disruption and changing customer demands are making the business environment more complex than ever before.



Human Collaboration

Smooth collaboration between employees is an integral part of the sales planning process. They must share the defined approach. In the individual process steps, they collect data, evaluate it and thus create the basis for decision-making by the executive board. The collaboration environment should therefore be equipped with the right methods and solutions.



Data & Tools

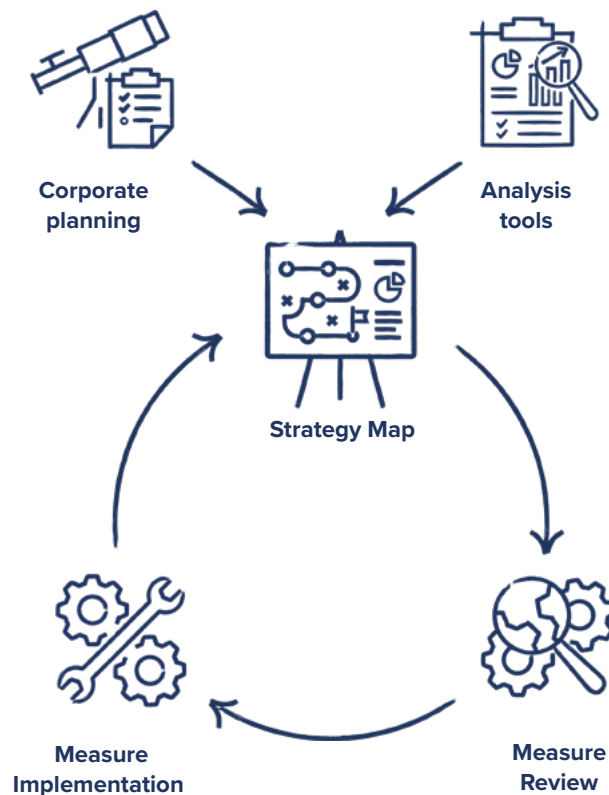
Planning is only as good as the data on which it is based. A high level of reliability and transparency is the result of a successful planning process. This is often reflected in the tools used for data preparation and processing. The higher the need for coordination in a company, the more a supporting solution is required to handle processes in a standardized and integrated manner.

Effective planning means operationalizing complexity. However, reducing complexity must not be at the expense of quality. Based on automated and integrated processes, all three dimensions can be taken into account in a strategic sales planning process and transformed into opportunities for the company.

Strategy Map: Your roadmap for Strategic Sales Planning

The basic framework of improving strategic sales planning is a multi-stage concept that flows smoothly into operational planning and thus perfectly links the two areas. Each step addresses its own points that need to be dealt with.

How such a concept looks in detail depends on individual parameters such as company size, market cycles and strategic orientation. Nevertheless, we would like to provide you with a general guideline here.



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Jedox is an integral part of our performance management process. I can't imagine our sales department without it.

Christoph Lang – Project Manager
Allsafe

#1 The foundation of planning

The overarching corporate planning provides the general framework for action - the thrust of the planning of individual divisions and departments is derived from it. In this way, it also forms the foundation for strategic sales planning.

- ✓ What is the purpose of the company?
- ✓ What is the corporate philosophy?
- ✓ What are the unique selling points of the company?
- ✓ What are the overriding corporate goals?
- ✓ What is the company's strategy?

#4 Implementation

Now that strategic planning has moved on to operational planning in the previous step, the next step is concrete implementation. It is clarified which measures and activities will be carried out when and how.

- ✓ Organization of the activities
- ✓ Empowerment of employees
- ✓ Orchestration of the measures

#2 Analysis of the actual and target situation

Internal and external influences determine the gap between the target and actual situation. Within the scope of an analysis - with the help of a handful of instruments - potential levers for the further planning process can be identified.

- ✓ SWOT analysis
- ✓ Sales audit
- ✓ Market and environment analysis
- ✓ Competitor analysis
- ✓ Customer analysis

#5 Regular review

To ensure the effectiveness and efficiency of the selected measures and activities, performance is monitored at regular intervals. In this way, conclusions can be drawn quickly in the event of a lack of success or exceptional success, and the strategy can be adjusted at any time.

- ✓ Monitoring of results by means of quantitative and qualitative targets
- ✓ Initiation of optimization processes if required

#3 The strategy map as a roadmap

In the concrete planning, sales targets are formed and underpinned with the corresponding measures and resources. The corporate goals and analysis results from the first two steps form the basis for this.

- ✓ Definition of sales targets (products/sales staff/sales processes)
- ✓ Formulation of sales strategy including forecast of results
- ✓ Planning of concrete sales measures and activities
- ✓ Planning of budget and resources
- ✓ Strategic price positioning

Enabling modern SPM

Maximize business value with Collaborative, Unified Sales Planning

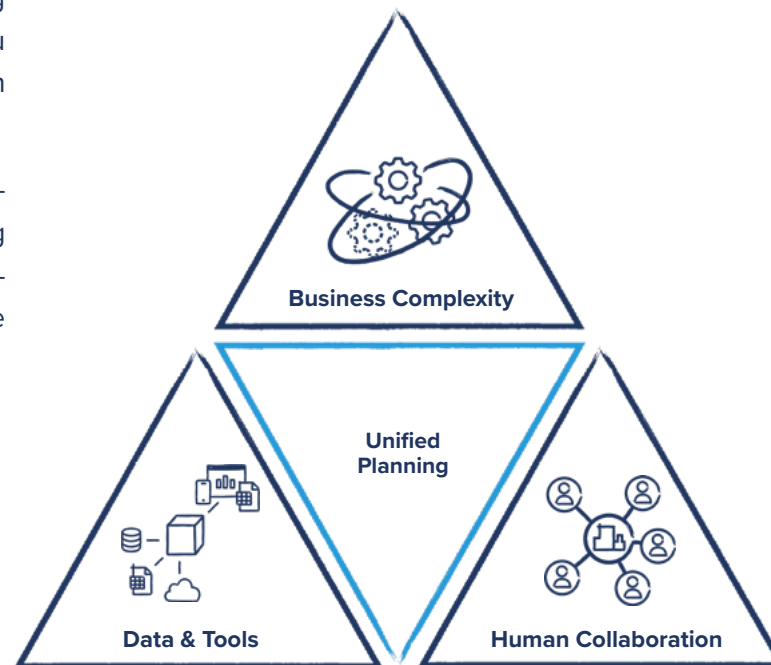
With increasing complexity across all sales planning processes, the demand for simplified solutions becomes louder. Fragmented processes and manual tasks make the implementation of strategic sales planning cumbersome and challenging.

Spreadsheets or isolated solutions quickly reach their limits - lack of automation and limited data availability disrupt the planning flow. Strategic sales planning forms the foundation for operational and sales planning and provides a framework for evaluating and controlling concrete measures. By creating transparency based on an integrated solution, you have taken the first step towards breaking down multidimensional complexity.

Unified planning increases efficiency and effectiveness across all areas of the company by supporting employees in planning with a software-based solution. It accelerates and simplifies processes while clearly revealing hidden potential.

Improved sales insights allow accurate planning and profitable forecasts to be derived. Decision-makers have access to up-to-date, secure data and information. This enables optimal control of the customer and product mix, capacity planning and sales cycles.

In talent management, transparent data provides motivation and drive.



In summary, the following benefits of an unified planning solution can be identified:

- > Focus through driver-based sales planning
- > Integration through a uniform platform for strategic-, sales and operational planning
- > Relief through digitalization, AI and machine learning
- > Agility through continuous real-time planning and modern forecasting

Jedox: Key features of an effective solution

Improve your sales insights and look into the future, shorten your budgeting cycles and sharpen your forecast accuracy. Transforming your sales planning with an unified, software-based solution like Jedox adapts your planning processes to the speed of change and takes your sales performance management to a new level.

For Strategic Sales Planning Jedox enables software based long term strategy, top down planning as well as sales insights and sales forecasts. Artificial Intelligence and Machine Learning support continuous Planning and time series prediction for new sales.

Jedox as one tool for the future offers you a unified platform for Sales Planning domains. Become a pioneer in modern sales performance management by optimizing your sales planning with a software-based approach.

Strategic Sales Planning

- › Long term strategy
- › AI/ ML
- › Top down planning
- › Sales Insights
- › Sales Forecasts

Sales Quota & Territory Planning

- › Bottom up planning
- › Market segmentation
- › T&Q plans
- › Capacity planning

Sales Incentives & Compensation

- › Modeling compensation plans
- › Individual Performance Insights
- › Compensation accruals
- › Sales crediting
- › Dispute Resolution



Jedox simplifies planning, analysis, and reporting with one unified and cloud-based software suite. Jedox empowers decision makers and business users across all departments and helps them work smarter, streamline business collaboration, and make insight-based decisions with confidence.

Over 2,500 organizations in 140 countries use Jedox for real-time planning on the web, in the cloud, and on any device. Jedox is a leading Enterprise Planning and Corporate Performance Management solution provider with offices on four continents and with over 250 certified business partners. Independent analysts recognize Jedox for its leading enterprise planning solutions.



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