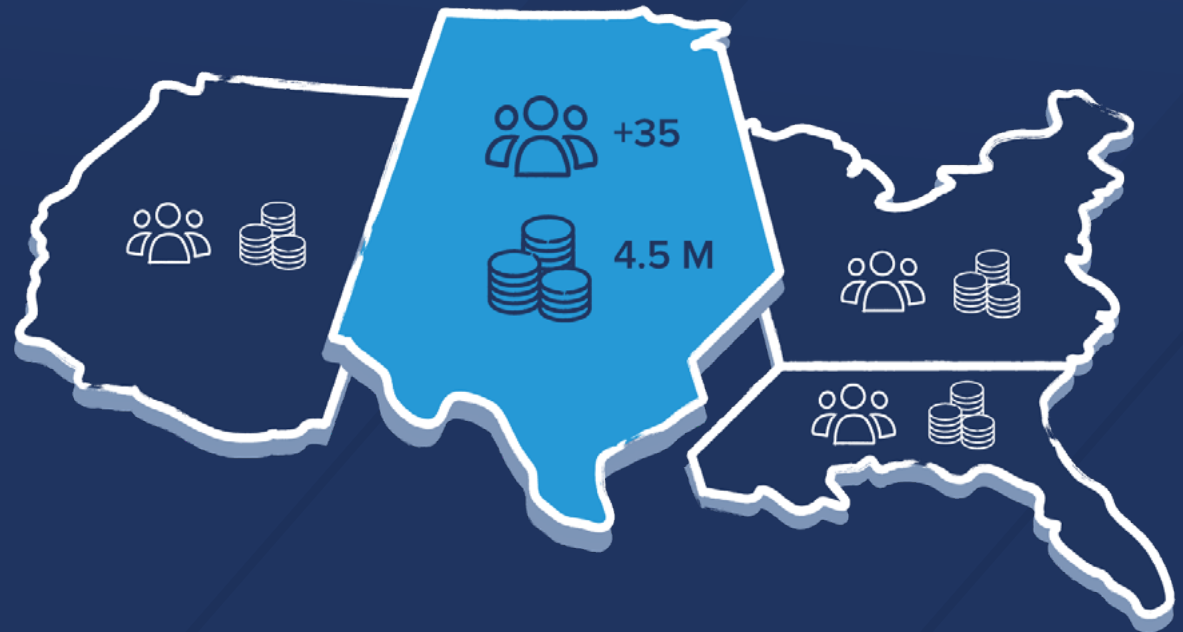


A pillar of modern Sales Performance Management:

# Your Ultimate Guide for Sales Territory and Quota Planning



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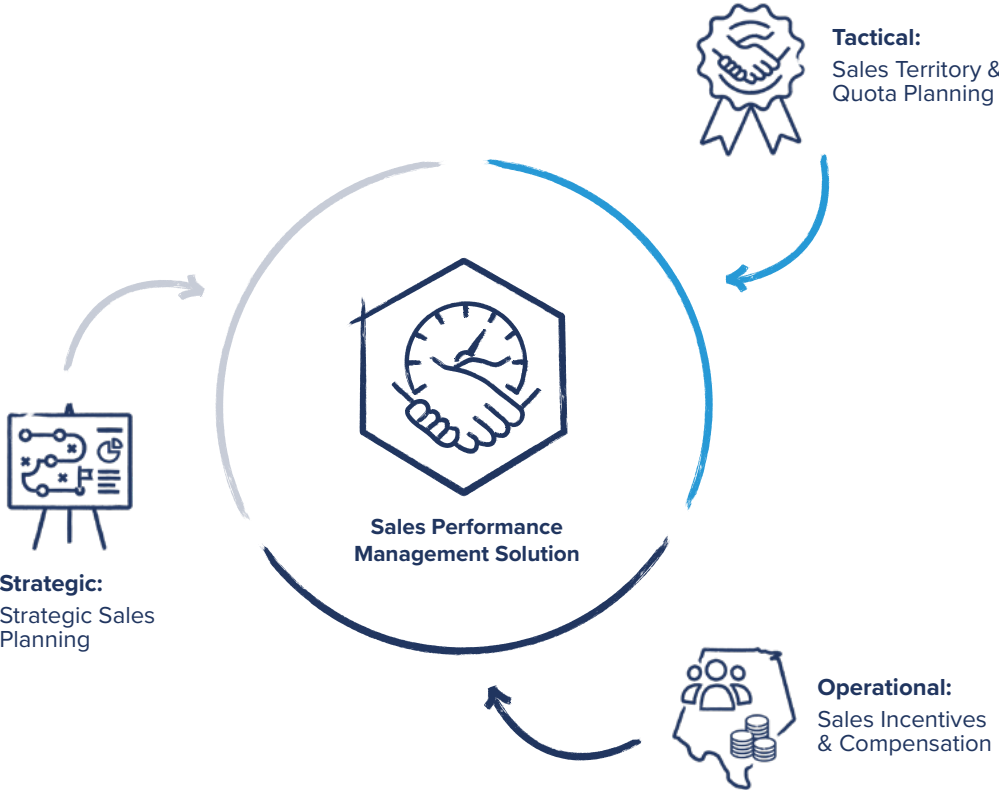
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# What to expect in this guide

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

Finding balance and maximizing value is key to improving sales territory and quota planning. This guide provides an overview of how it fits into collaborative, unified sales planning to enable modern SPM. Discover the importance of balanced sales territory and quota planning, the hurdles you will encounter along the way, and how you can enable your sales team to do what they do best – talking to customers and closing deals. Use this guide to deepen your understanding of linking sales territory and quota planning with SPM. Learn how this process can be supported, increase accuracy, and improve sales planning across your organization.



## Unified approach for sales planning domains

Digital planning platform

# Sales Territory and Quota Planning

## The Impact on Performance & Credibility

Sales territory and quota planning will ultimately be fundamental to defining your organization's sales strategy and empowering your sales team members to map their own path to success. As a pillar of modern SPM, not getting it right means untapped potential, frustrated sales professionals, and potentially losing valuable resources because of poorly planned T&Q.

Aligning business data is key to achieving balanced territory planning and realistic sales quotas. Enabling access to all relevant data with modern SPM allows you to make informed decisions about sales territories and quotas and easily make adjustments as needed throughout the year to stay on course.

Effective, software-supported planning supports salespeople in planning and managing sales, sales territories, quotas, and compensation models. With intelligent, automatable forecasts, you always know where you currently are and can accurately measure performance and increase trust and credibility by being able to provide intelligent course corrections along the way.

### Sales quota achievement



**Sales territory and quota planning** is the set of processes that align with strategic sales plans assigning territory by geographic region, industry, or account type to specific sales members and setting financial goals for specific time periods.

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With Jedox, we always know the status of our sales projects and can respond with targeted, timely actions.

Thomas Kremer –  
Head of Sales Controlling  
Zimmer BIOMET

# Finding balance and maximizing value

Sales territory and quota management that is poorly balanced dramatically increases the risk you'll lose valuable resources, talented sales professionals being among them. Utilizing the capabilities of modern sales territory and quota planning provides balance, maximizes value, and reduces frustration across the sales organization. This is another multidimensional aspect of modern sales performance management, in addition to strategic sales planning and sales incentives and compensation.



## Provide Balance

Finding the right balance is vital to successful sales territory and quota planning that align with market and business goals. Having all relevant data easily accessible for T&Q ensures you avoid the pitfall of putting too heavy of a weight into a single territory or setting quotas too high or too low. Carefully review your historical sales data to design territory planning and account segmentation.



## Maximize Value

With balanced sales teams and territories, it is much easier to maximize value as well as potential for your sales teams and quota carriers to succeed. Quotas can sometimes be a sensitive subject for sales, so it is important they are clear and easily understandable by all stakeholders.



## Avoid Frustration

Most companies are only as successful as their best salespeople. A frustrated sales professional who has been assigned a high quota may feel like it is unattainable. Successful sales territory and quota plans provide a high level of reliability and transparency. This is often reflected in the technology organizations use for their data preparation and processing. No one likes having to dig through old spreadsheets that are several years old to figure out where the T&Q needs to be adjusted.

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.

# Roadmap for Sales Territory and Quota Planning

The basic framework of improving sales territory and quota 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.



## Define: Planning

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.



## Set: Capacity and Segmentation

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.



## Maintain: Forecasting

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.

# Enabling modern SPM

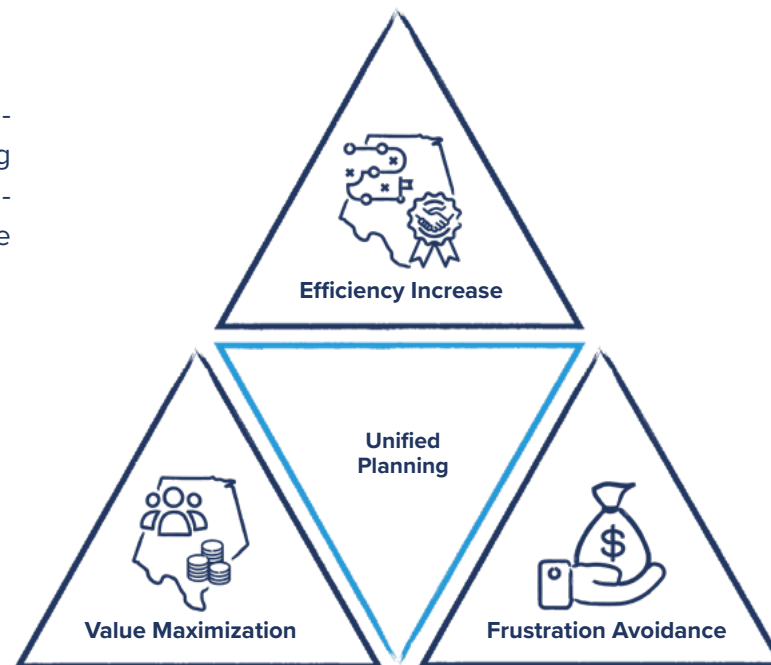
## Accelerate performance with faster, more accurate territory and quota planning

With increasing complexity across all sales planning processes, the demand for simplified solutions has become louder. Fragmented processes and manual tasks make a visible, credible, and accurate T&Q process even more cumbersome and challenging.

Spreadsheets or isolated solutions quickly reach their limits - lack of automation and limited data availability disrupt the planning flow. Faster, more accurate, and more reliable territory and quota planning is key to successful long term SPM. 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.

Give your sales force the best chance to achieve their revenue targets and close rates and no longer rely on pure speculation for territory and quota planning. Whether geography, industry, or product, you can model ideal and actionable structures across multiple dimensions. Increase your sales team's motivation by setting sales quotas that are perfectly aligned.



### The benefits of a unified planning solution:

- > 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

Increase your productivity and achieve peak revenues - optimize your resources and sharpen your forecast accuracy. Jedox enables perfectly thought-out and coordinated territory and quota plans and realistic market segmentation. It also supports bottom-up planning and capacity planning.

Transforming your sales territory and quota planning with a unified, software-based solution increases visibility on targets, quotas, product mix, forecasts, and top performers to have a full 360 degree view of performance.

Modern Sales Performance Management enables you to easily adapt your planning processes to the speed of change and takes your sales performance management to the next level.

## Sales Quota & Territory Planning

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

## Strategic Sales Planning

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

## 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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