

Strategic Sales Planning

An Intelligent Approach to Sales Planning to Optimize Performance

Xactly's Strategic Sales Planning solution eliminates the guesswork in building plans that align with enterprises' sales and revenue targets to drive top-line growth. Leveraging artificial intelligence and advanced scenario modeling to support data-informed profitability, capacity, alignment, and target planning allows organizations to optimize how they deploy their go-to-market resources.

By connecting these processes and integrating them with a company's existing tech stack, Xactly's Strategic Sales Planning solution ensures leadership across sales, sales ops, compensation, and finance have a single source of truth to build dynamic sales plans to drive sales performance.

The Impact of Adopting Strategic Sales Planning

INCREASED PRODUCTIVITY

↓ **25%**

Reduction in time to create sales plans

INCREASED REVENUE POTENTIAL

↑ **14%**

Increase in reps' quota attainment

Xactly's Strategic Sales Planning Solution Unifies Four Key Areas:

Profitability

Plan for the financial profitability of the go-to-market teams:

- Objective Planning
- Coverage Planning
- Employee Cost Modeling

Capacity

Plan for resource productivity and capacity:

- Roster Planning
- Ramp & Seasonality Planning
- Attainment Planning

Alignment

Plan for the territory alignments and assignments:

- Account Planning
- Territory Balancing and Optimization
- Discretionary Re-alignment Planning

Target

Plan for the allocation of targets across the coverage model:

- Top-Down, Bottom-Up and Derived Target Setting
- Proration & Seasonality Modeling
- Discretionary Target Override Planning

A Customer's Perspective

"Xactly allowed us to realign territories without any delays. All of our managers really liked the solution, and I have to say it was a valuable resource for us" - A Global Life Sciences Company

Benefits of Xactly's Strategic Sales Planning Solution

Automated

Integrate seamlessly with your existing tech stack including your CRM, HCM, ERP, OSM, and ICM solution, and other enterprise systems to transfer data and enable a holistic approach to sales planning.

Collaborative

Build trust and collaborate efficiently across different departments. Create iterative snapshots of your plan, model "what-if" scenarios, monthly plan updates, and analyze side-by-side comparisons.

Data-Informed

Enhance decision making by leveraging AI to predict key metrics including optimized territories, ideal ramp times, productivity targets, and seasonality in sales.

Continuous

Proactively monitor and continuously optimize sales plans with changes in business conditions to course-correct in real-time.

Strategic Sales Planning is one of the five essential components of Sales Performance Management (SPM). Xactly, experts in SPM, provide five distinct solutions — plan, manage, integrate, incent, and analyze — to help enterprises simplify the complex and effectively navigate the normalcy of change to reach their organizational goals. Change is inevitable. Growth is not optional when enterprises choose Xactly as their partner. For additional information on Xactly's Plan, Manage, Integrate, Incent and Analyze solutions for SPM please visit our website.