

Planning for Predictable Revenue

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Today's Presenters



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Today's Discussion

What's required

- People
- Processes

Using data effectively/ KPIs that count

- Which KPIs are most meaningful for your business?
- Workflows that support your KPIs
- Processes that support your KPIs

Key Elements for Predictable Revenue

How effective is your ability to predict revenue?

1. 100% accurate

☐

2. 50% accurate

☐

3. 25% accurate

☐

4. None of the above

☐

Sales

Market Assertion

By 2023, one-half of chief revenue officers will find their existing SFA technology inadequate to optimize territories and accounts to meet the quotas required to achieve maximum revenue potential.



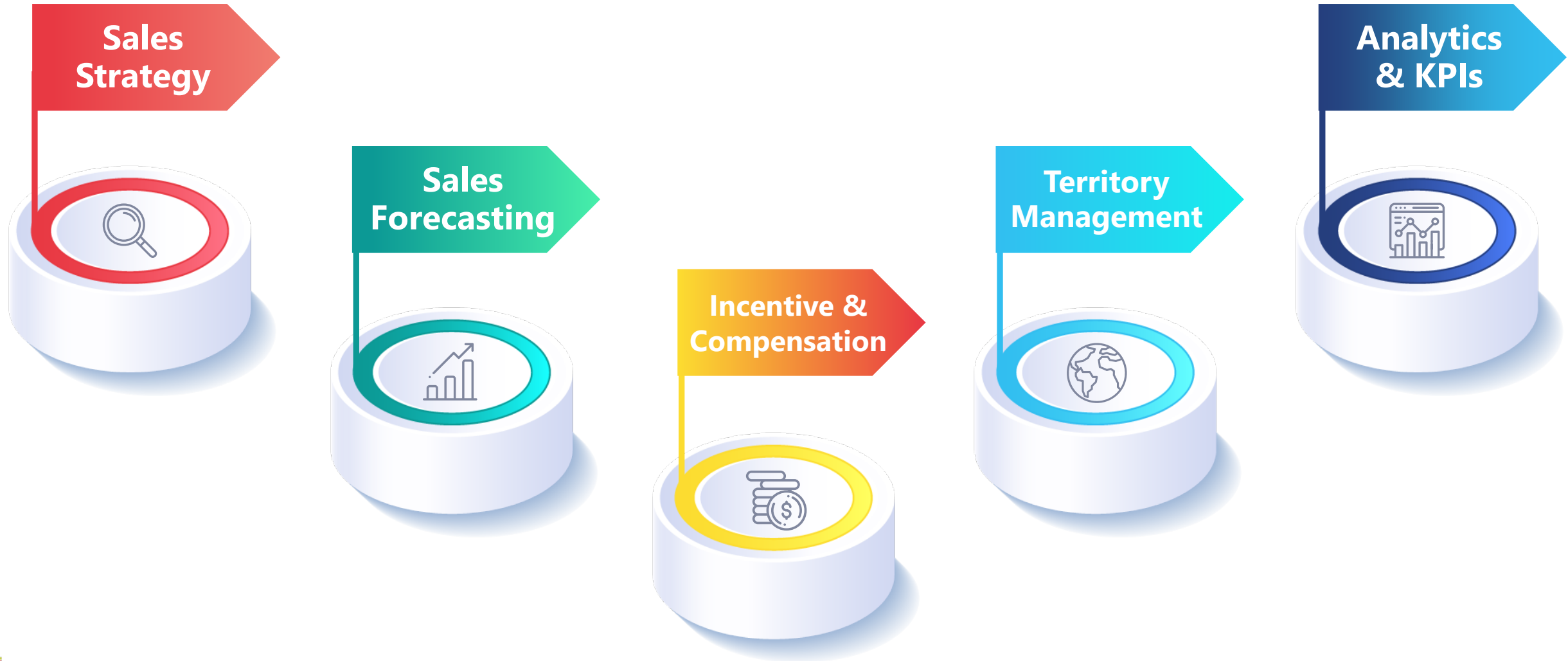
Stephen Hurrell
VP & Research Director



VENTANA
RESEARCH



5 Pillars of Sales Performance Management



What are the top 3 most important KPIs for your organization?

1. Closed business ☐
2. Conversion rates from lead to opportunity ☐
3. Accurate sales forecasting ☐
4. Sales cycle time ☐
5. Customer retention rate ☐

Top of Mind Concerns for Sales Leaders



**Improve
T&Q
Efficiency**



**Optimize
Sales Capacity**



**Identify
High-Propensity
Accounts**



**Effectively
Measure
Performance**



**Achieve
incentive-based
comp. plans**

From Sales Operations to Revenue Operations



Create a formal mission for The sales organization

- Key objectives definition
- Continuous benchmarking
- Definition of an effective communication channel



Enforce collaboration with other functions

- Alignment between sales operations, human resources and finance
- Online collaboration tools



Best practices and scalable processes

- Acting as a central hub for the sales organization
- Definition of standard processes and methods



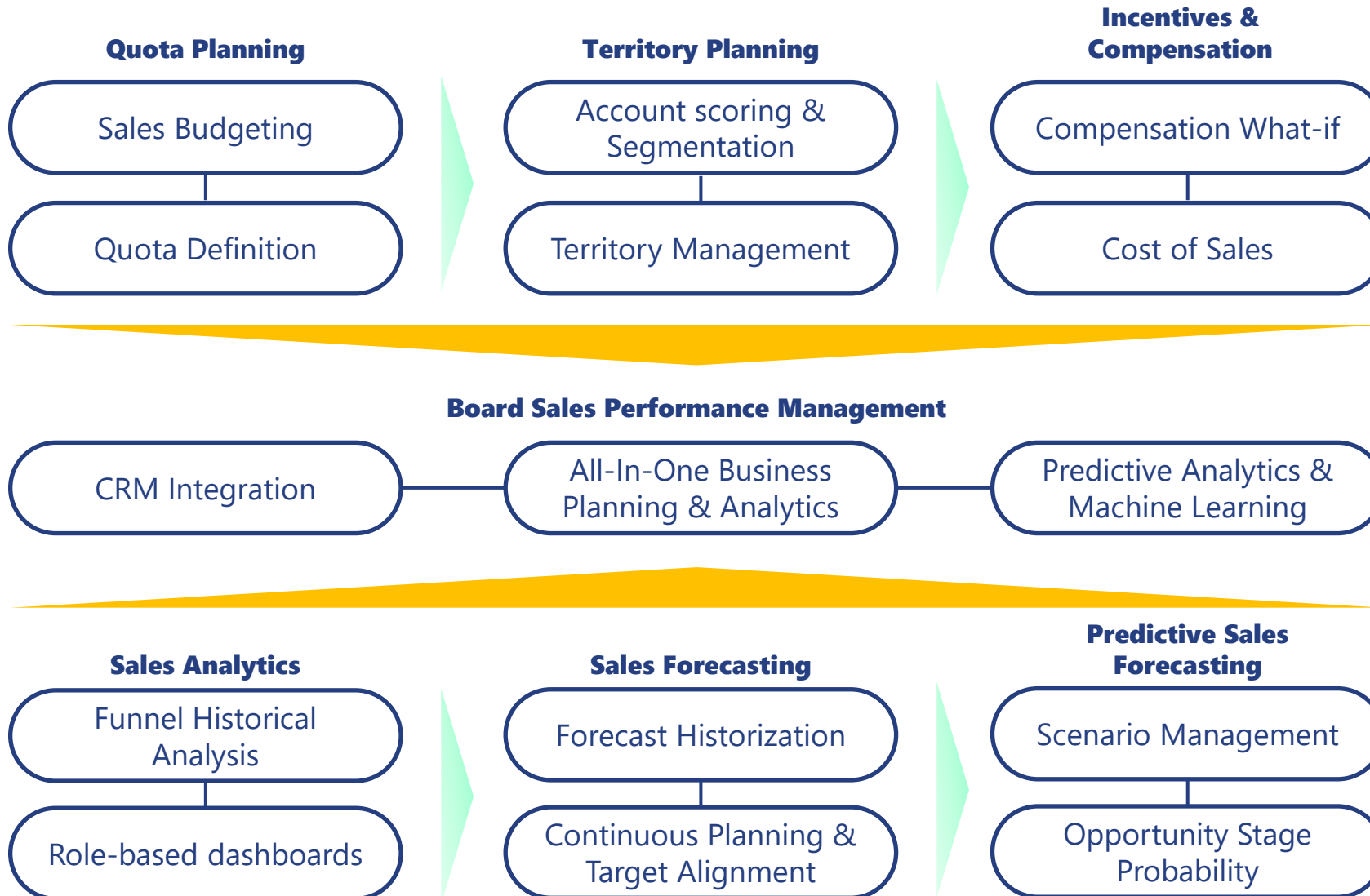
Prioritize customer retention

- In-depth knowledge of customer base
- Support of negotiation with deal desk
- Sharing of key customer insights with reps



Board Sales Performance Management

A Single Platform Connecting People, Data & Processes



Key Benefits



Quota Planning



Cascade quotas, and goals across the organization



“What-if” scenarios to assess changes



Quickly expand sales organization



Territory Planning



Easily score and segment accounts



Efficiently allocate and transfer accounts



Account distribution and contacts acquisition analysis



Incentives & Compensation



Construct compensation with accelerators, tiered commission rates/bonuses and SPIFs



Optimize compensation plans



Deliver accurate, timely incentive payouts

Key Benefits



Sales Analytics



Give sales reps and managers real-time data on sales performance



Maintain easily traceable record, dramatically simplifying audits



Connect CRM objects in in charts, graphs and maps



Sales Forecasting



Provide a single shared source of sales data



Limit visibility by role, providing level base access



Measure potential changes before rolling out targets to the sales team



Predictive Sales Forecasting



Leverage AI-power to enhance sales productivity



Model opportunity probability



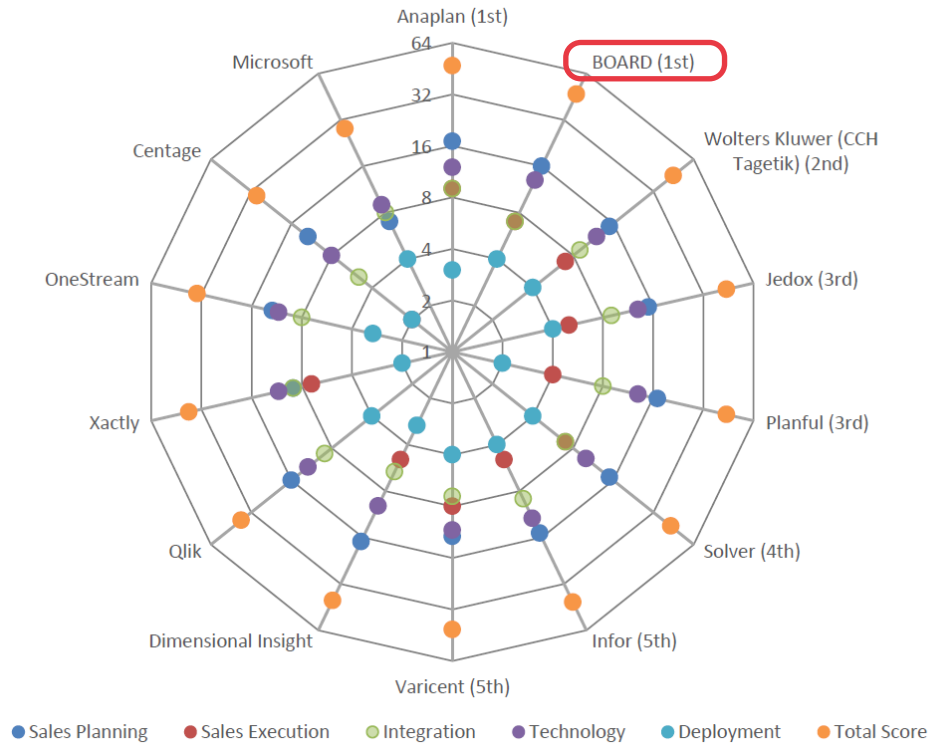
Measure forecast accuracy at sales rep level

Key Attributes of Class Leading Applications

Outcome	Attribute
Motivated sales team	Balanced and equitable territory, accounts and quotas
Team aligned to targets	Actions and behaviors linked to revenue and margin targets through incentives and compensation plans
Optimize attainment despite changes	Dynamically recompute for changes such as salespersons, leaving, joining and moving within the organization
React to changing market conditions	Adjust incentives and compensation to align with promotional activity in response to changing market conditions and competitive threats.
Continuous improvement	Single, platform system with integrated data model for single version of truth reporting and analytics.
Usable sale and revenue forecasts	Predictive analytics and AI assisted validation of bottom-up judgement-based sales and revenue forecasts.
Alignment to company objectives and policies	Straightforward bi-directional sharing of data and objectives with Finance and HR

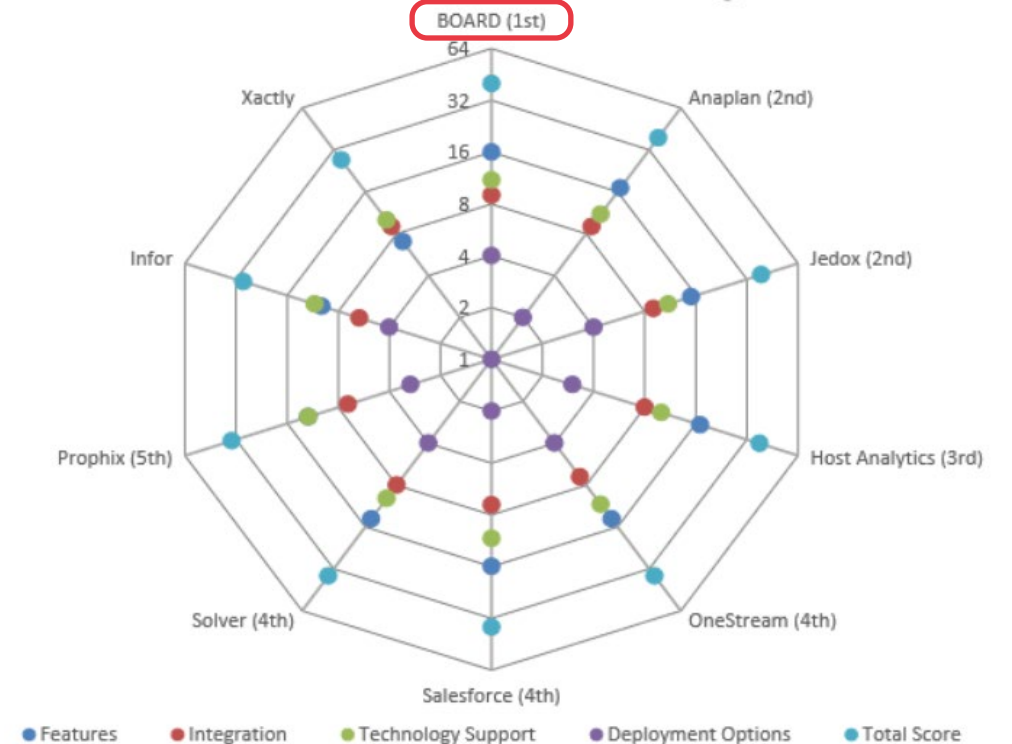
Board Named #1 SPM Platform

Sales Performance Management Vendor Ratings



Board Named #1 Sales Planning Platform

Sales Planning Vendor Ratings



International Recognition: Analysts



LEADER

EPM

Planning, Budgeting, Forecasting



Dresner
ADVISORY SERVICES

#1 WW

Sales Performance Management

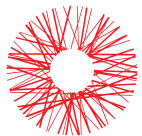
LEADER

CPM, BI & Analytics



MARKET LEADER

**Integrated Planning & Analytics
(Highest Portfolio Capability)**



**NUCLEUS
RESEARCH**

LEADER

CPM

BI & Analytics



**VENTANA
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**"EXEMPLARY"
LEADER**

**Global Analytics
& Data**

Gartner®

**2 MAGIC QUADRANTS
GARTNER PEER INSIGHTS**

**Cloud FP&A | Data & Analytics
Customers' Choice Award**



TOP RATED

Financial Consolidation



Pharma

Sales & Promotion Planning,
Sales Budget & Forecast



Tech & Services

Sales Performance
Management, Sales & Service
Reporting



Manufacturing

Sales Channel
Allocation



Beverage

Sales Performance
Management



White Goods

Weekly Sales Estimate,
Corporate Analysis



CPG

Sales Analysis & Score carding
Account segmentation & quota
planning, CRM Automation
integration



Consumer Goods

Sales Budgeting



Industrial Automation

Sales Planning, Sales Budget &
Forecast Marketing Promotion
Planning



Pharma

Sales Planning, Sales Budget &
Forecast Marketing Promotion
Planning

Getting started - **Board SPM**

Schedule time:

- Custom Board Demo
- Proof-of-Concept with Board
- Discovery Discussion



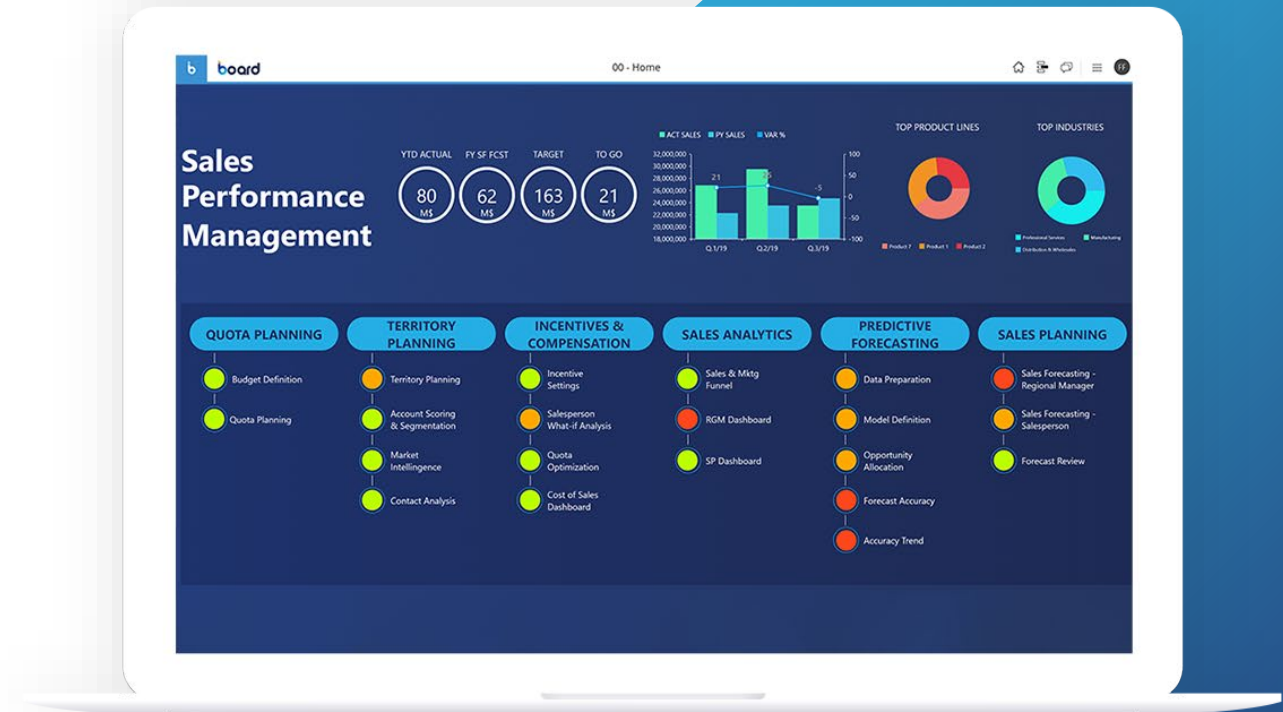
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Q&A



Thank you!