

## Sales Planning

# Accelerate sales planning in a centralized and connected experience – now native in CRM.

### Centralized Planning Hub

Design, build, optimize, and iterate sales plans that reflect revenue results and upcoming goals. Within a single platform, companies can leverage customer data, in-app guidance, and real-time visibility into sales performance to craft flexible plans optimized for customer coverage.

### Segment & Hierarchy Design

Visualize account, market, and other CRM data points at each level of the hierarchy for precise segmentation.

### Allocation & Quota Refinement

Distribute fully optimized quota and other key metrics across the sales organization, directly from the CRM.

### Territory Carving & Optimization

Quickly and intelligently align accounts and territories to meet organizational priorities.

### Plan Collaboration

Nurture alignment and teamwork with comprehensive visibility into the planning process for the entire sales organization.

### The ROI of intelligent sales plans:

#### Revenue

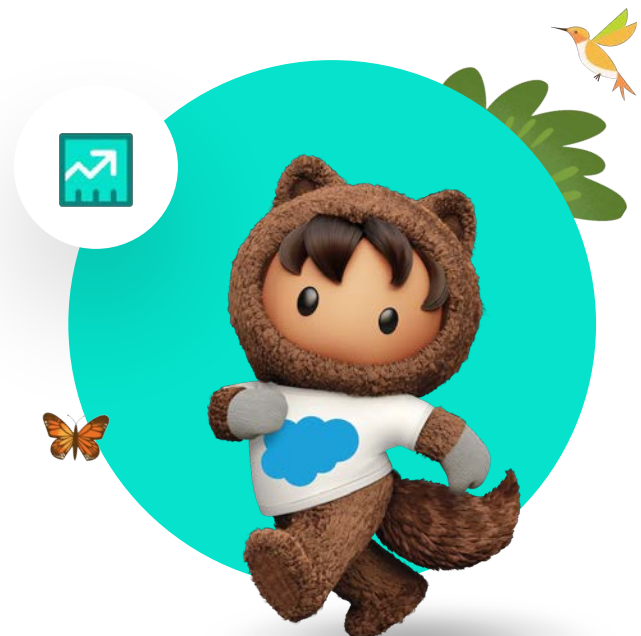
Unbalanced territories can cause organizations to miss up to 7% of revenue.

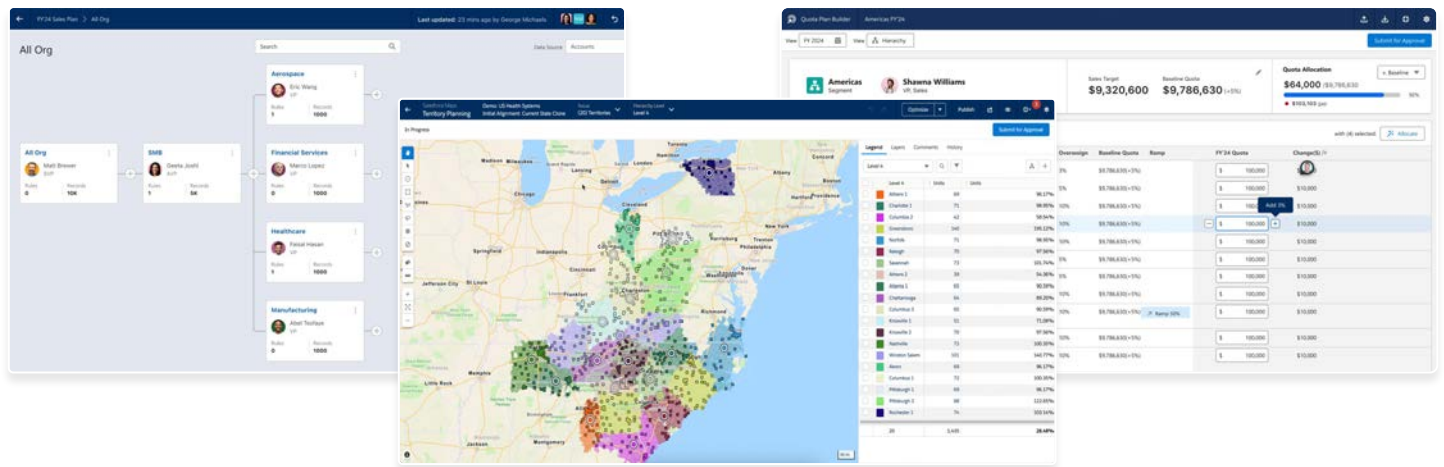
#### Satisfaction

Balanced patches improve customer responsiveness and lower seller attrition.

#### Agility

Adapt to market changes in days instead of weeks or months.





## Sales Planning Features and Benefits

### Connected Data

A single unified launchpad backed by CRM-enriched data driving more accurate planning cycles.

### Design & Collaboration

Visibility and consistency within and across the organization for stronger alignment.

### Segmentation

Actionable insights powered by CRMA across sales records and imported third-party data.

### Territory Carving & Optimization

Balance accounts and territories to set sales team up for individual and collective success.

### Targets & Quota

Comprehensively distribute quota and other relevant measurements with spreadsheet-like ease across the sales organization.

### Planning Activity Tracking

Review changes and team activity to align organizational efforts.

### Permission-Based Access

Least-privilege permissions tied to specific users.

### Quota Attainment Planning

Enable sellers to set strategy for achieving targets and improving attainment.

### Plan Publishing

Launch updates in simple steps to your CRM or export for external integrations.

“Salesforce helps us automate and simplify the planning process. We anticipate saving thousands of hours, and it’s setting us up to be a more agile organization.”



**Todd Hanna**  
Director, Digital Solutions  
Michelin