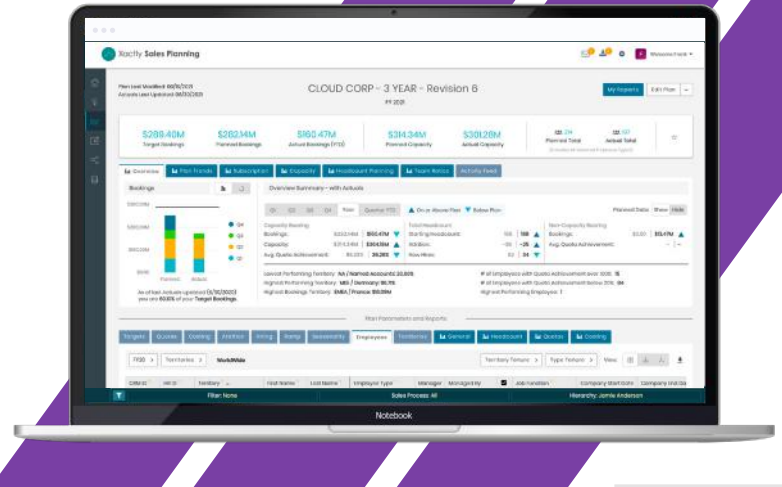


# Capacity and Quota Planning

Design, Monitor and Optimize Sales Capacity and Quota Plans



Sales planning can be stressful. Manual processes are time-consuming and make collaboration between Sales, Sales Operations and Finance difficult, causing critical information to slip through the cracks. As a result, many sales teams rely on an annual planning cycle, which greatly impacts their ability to respond with agility when unforeseen disruptions occur.

Xactly Sales Planning is an automated sales planning solution that empowers organizations to easily create, continuously monitor and optimize data-based sales capacity and quota plans.

## AUTOMATE SALES COVERAGE AND CAPACITY PLANNING PROCESSES

Determine the optimal resources required to hit bookings goals using automation.

- ▶ Access intuitive dashboards showing headcount plans, quota, achievement and performance, so users can see how events, such as hiring and attrition, impact goals.
- ▶ Create iterative snapshots of sales plans, model “what-if” scenarios and monthly forecasts, and analyze side-by-side comparisons across teams.

## INCREASE VISIBILITY ACROSS PLANNING PROCESSES

Monitor ongoing sales performance to drive alignment and link planning more closely to execution.

- ▶ Provide Finance and Sales teams with dashboards showing more granular visibility into how the organization is operating to enable more strategic business decisions.
- ▶ Use out-of-the-box KPIs and dashboards highlighting historical and real-time data to proactively analyze metrics so you can spot and correct problems faster.

## STRENGTHEN ORGANIZATIONAL INSIGHTS

Use artificial intelligence and data integration to:

- ▶ Predict key indicators such as ramp times, ideal quotas and seasonality in sales to build optimal sales plans.
- ▶ Consolidate data from CRMs and other sources to capitalize on historical performance data to drive growth.



## Why Xactly Sales Planning™?

Xactly understands the value of bringing together operational and intelligence capabilities to drive revenue operations success. That's why we built our [Intelligent Revenue Platform](#), enabling us to align planning, performance and prediction functions into one cohesive platform.

As part of the broader Intelligent Revenue Platform, Xactly Sales Planning provides end-to-end continuous sales planning solutions that incorporate automation and data-based insights, so you can manage everything including coverage, territory, quota and capacity management.

**25%**

Reduction in time to create sales plans

**14%**

Increase in quota attainment

### Trusted by Customers to Strengthen Organizational Insights

Leverage artificial intelligence and data integration to enhance decision-making and accurately predict and optimize sales plans.

**“Best Platform for Quota and Territory Management.”**



**“Perfect way to get accurate results”**



**>> READY TO GET STARTED? <<**

To learn more about Xactly Sales Planning™, visit our website to request a demo at [xactlycorp.com](https://xactlycorp.com).

#### ABOUT XACTLY

Xactly has helped thousands of companies and millions of sellers around the world beat their revenue targets. Using Xactly's solutions, leaders look past the current quarter to create revenue streams for long-term growth.

The Xactly Intelligent Revenue Platform marries artificial intelligence and 17 years of proprietary data in easy-to-use applications. Sentiment, process and trend analysis come together to form accurate machine forecasts. Quick identification and implementation of revenue plan, quota and territory improvements is easy. And, rapid calculation of even the most complex compensation plans keeps sales reps motivated and on track. This makes the Xactly Intelligent Revenue Platform the only solution that aligns seller behavior with boardroom strategy to create a resilient, predictable and profitable business.