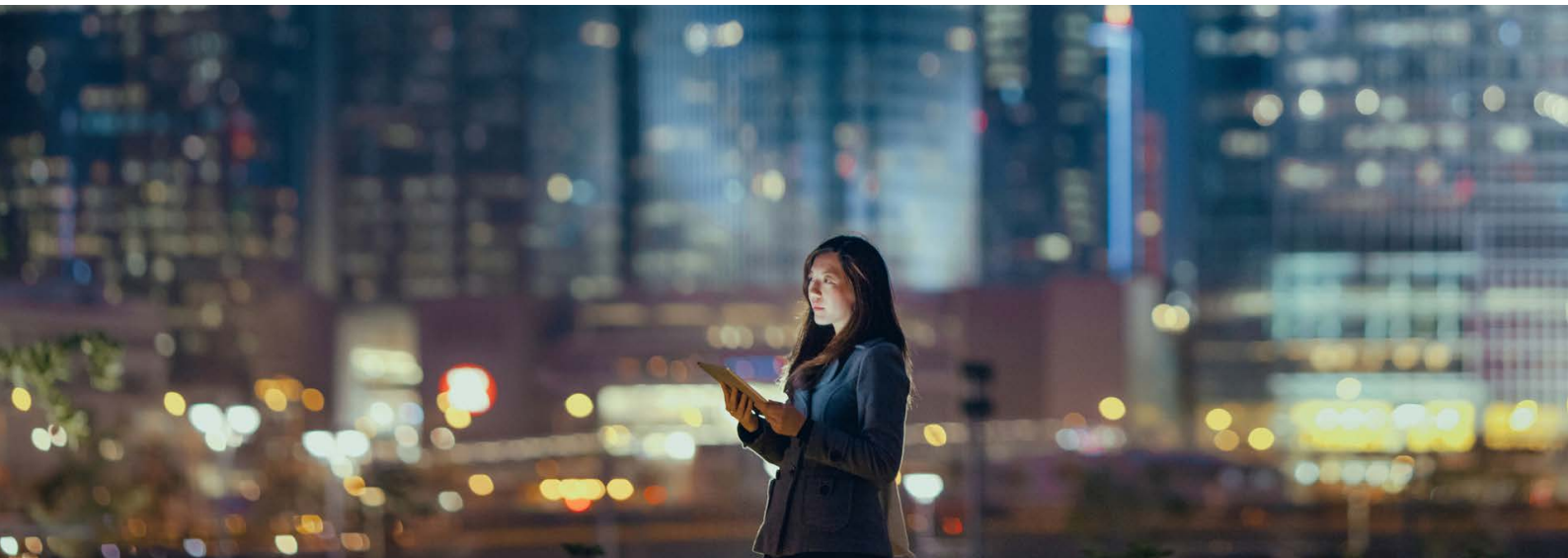**SAP Solution Brief | PUBLIC**
Sales Performance Management | SAP SuccessFactors Territory and Quota

Optimizing Sales Planning to Achieve Agility, Fairness, and Transparency

SAP

Translating Your Sales Strategy into Effective Sales Plans

Allocating territories effectively and setting fair and realistic quotas is crucial if you are to keep sales teams motivated and engaged while fulfilling strategic goals. With the SAP® SuccessFactors® Territory and Quota solution, you can **streamline sales planning** and gain the insights you need to optimize territory assignments, set targets in an equitable way, and maximize revenue.

As one of your most valuable resources, a happy sales force is key to success. However, too often, unattainable targets and uneven workloads can disillusion sales staff, leading them to seek positions elsewhere. Manual processes and the use of different approaches in different teams can make territory and quota setting a haphazard, time-consuming, and unscientific affair. Meanwhile, a lack of up-to-date performance information can make it difficult to correct plans quickly to meet corporate goals or take advantage of new market opportunities.

From territory optimization to quota management, SAP SuccessFactors Territory and Quota helps you automate the sales planning process. You can manage territory assignment effectively and fairly, based on opportunity, workload, account information, and geography. You can also adjust quotas and drive sales performance in alignment with business goals, preventing overallocation or underallocation of accounts and responding quickly to market changes.

Territory Modeling and AI Optimization

SAP SuccessFactors Territory and Quota optimizes the process of creating and managing sales territories within your sales organization, with embedded workflows streamlining approval processes for territory assignment. Innovative segmentation tools and a powerful rules engine enable you to automatically build or update territory assignments. Meanwhile, territory modeling functionality uses customer demographics, geographic information, and other relevant factors to propose potential sales territories, allowing you to explore "what-if" scenarios. The solution also analyzes various data points to identify patterns and correlations, enabling sales managers and administrators to define well-balanced and optimized territories for sales representatives and helping ensure that sales resources are allocated strategically.

You can align products to territories based on product category associations and use flexible rule definition to automate product alignments for the territory program. In addition, AI enables you to optimize territory creation while taking multiple constraints and objectives into consideration. These include minimizing overlap between territories, maximizing sales potential, and helping ensure fair distribution of workload and travel efficiency.

Territory Modeling and AI Optimization

Sales Forecasting and Quota Setting

Visualization and Mapping

Analytics and Reporting

Sales Forecasting and Quota Setting

Using advanced analytics, SAP SuccessFactors Territory and Quota draws on information from other enterprise solutions, tapping into multiyear historical data to analyze past sales performance and establish performance patterns. Based on your desired growth by product categories, accounts, or time period dimensions, the solution then defines a quota for each salesperson. Meanwhile, powerful and flexible calculation options enable you to cross-reference different quota types and make midcycle changes to quotas to reflect changing business conditions.

A tailored KPI scorecard helps you drive behavioral changes to align your sales organization with corporate strategy. In addition, a dedicated dashboard helps you empower and engage your sales reps and managers, giving them access to relevant performance data at their fingertips. What's more, embedded workflows help facilitate sales team communications and quota approvals or acknowledgements and streamline other sales planning processes.

Finally, continuous monitoring and analysis of actual sales against forecasts and quotas give you insight you need to make data-driven decisions and adjustments. In this way, you can optimize sales performance over time and stay aligned with overall company objectives.

Visualization and Mapping

With visual and interactive mapping functionality, SAP SuccessFactors Territory and Quota provides a quick and straightforward way to set up and manage territories. Geospatial analysis of sales territories enables you to identify trends and coverage gaps. In addition, based on geographical data, you can identify potential untapped markets, enabling you to take steps to allocate more sales resources where they are needed.

More-granular geographical information and on-demand aggregated statistics help you make informed sales planning decisions. And with in-depth insights into customer distribution, market potential, and regional sales performance, you can better align sales plans with your business strategy.

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Understand at a glance how to **make your territory allocation more effective** with intuitive visual mapping tools.

Analytics and Reporting

Robust analytics and reporting in
SAP SuccessFactors Territory and Quota
enable you to monitor and analyze sales data,
track progress against targets, and make
informed decisions to optimize sales operations.

Key capabilities include:
- **Interactive dashboards**: Offering a visual
  representation of key sales performance
  metrics and territory-related data
- **Real-time data integration**: Providing real-time
  updates from various data sources, including
  CRM and sales performance solutions
- **Territory performance analysis**: Providing
  insights into metrics relating to sales revenue,
  customer acquisition, and sales pipeline
- **Quota attainment tracking**: Monitoring the attain-
  ment of sales quotas for individual sales represen-
  tatives, teams, regions, or the overall organization
- **KPI monitoring**: Tracking KPIs related to
  territory performance, sales targets, customer
  engagement, and other relevant metrics

- **Ad hoc reporting**: Enabling the creation of ad
  hoc reports tailored to your specific needs
- **Data visualization**: Making it easier to interpret
  and communicate complex sales data with
  charts, graphs, and heatmaps
- **Drill-down capabilities**: Enabling you to explore
  granular details, such as individual sales
  transactions, customer information, or specific
  quota assignments
- **Benchmarking and historical comparison**:
  Evaluating current sales results against
  historical performance or industry standards
- **Export and sharing**: Sharing insights with
  stakeholders and decision-makers by exporting
  reports in various formats

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Improving Business Outcomes with Optimized Territories and Fair Quotas

By setting fair quotas based on more-accurate forecasts, you can motivate your sales teams more effectively and avoid demoralization due to unrealistic targets. Meanwhile, making sure that you allocate salespeople to the right regions or customer segments helps you increase sales opportunities and reduce travel time and expense.

SAP SuccessFactors Territory and Quota also helps sales teams work more efficiently, with automated sales planning processes allowing them to focus less on administration and more on selling activities. In addition, collaboration features support better teamwork, enabling salespeople to communicate updates and share best practices.

Tight integration with other enterprise solutions enables you to make data-driven decisions based on the latest information. What's more, a clear view of sales performance allows you to identify additional training needs and areas for improvement and helps ensure you are aligned with business goals.

SAP SuccessFactors Territory and Quota also offers the flexibility to adjust your sales plans in response to changing market conditions, helping you make the most of emerging opportunities and meet new business priorities in an agile way. In addition, the cloud-based solution enables you to scale quickly to meet new requirements, while availability in multiple language versions supports your geographical expansion.

Summary

The SAP® SuccessFactors® Territory and Quota solution helps you optimize territories, adjust quotas, and drive sales performance in alignment with your overall business goals. In this way, you can better motivate your sales force, maximize revenue potential, and adapt to changing market conditions.

Objectives
- Streamline sales planning processes
- Make well-balanced territory assignments to help ensure effective allocation of sales resources
- Create fair and equitable quotas based on accurate forecasts

Solution
- Advanced territory modeling, optimized with AI technology
- Data-driven and transparent quota calculations
- Visual mapping and geospatial analysis of sales territories
- Embedded analytics and reporting functionality
- Straightforward integration with enterprise solutions, including SAP SuccessFactors solutions

Benefits
- Better-motivated sales teams, working toward achievable targets
- Improved sales team efficiency, with automated processes freeing more time to focus on sales activities
- Data-driven decision-making based on in-depth analysis of sales performance
- Ability to change sales plans quickly in response to changing market conditions

Learn more
To find out more, call your SAP representative today or visit us **online**.

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