Anaplan

Anaplan for Sales & Microsoft Dynamics 365

Aligning sales execution with the revenue strategy

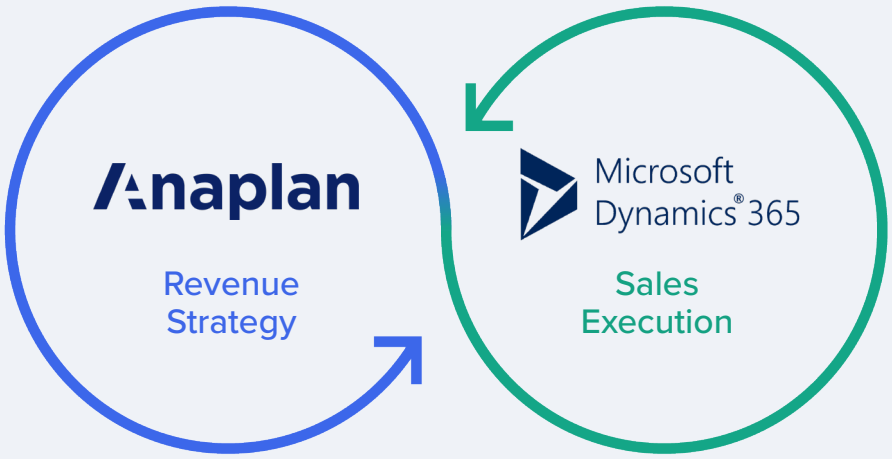
CRM solutions are an indispensable tool for go-to-market efforts, helping sales teams execute and accelerate revenue-generating activities. But strategy is what steers the ship. Sales and operations leaders must work together to define the organization's go-to-market strategy, the all-encompassing revenue plans for achieving corporate objectives.

Successfully building and executing these plans is a challenge in ever-changing markets, requiring a holistic view of sales performance drivers and insights from across the business. For businesses to consistently drive growth while navigating change, they need a way to capitalize on the value of their CRM while expanding upon its capabilities to build their go-to-market strategy more effectively.

Expand the value of Dynamics 365 with Anaplan

As your sales teams adopt Dynamics 365 for Sales, it becomes a key data source for building and adapting your revenue strategy, providing crucial input for better decision-making. Anaplan's platform can combine this CRM data with other source system data to provide modeling capabilities and intelligence-based insights that help leaders craft a revenue plan aligned with corporate goals.

Built to manage the entire go-to-market strategy, Anaplan for Sales solutions span account segmentation, territories, quotas, sales capacity, incentive programs, KPI tracking, multi-dimensional forecasts, scenario modeling, and more. The platform provides relevant visibility to all stakeholders while allowing leaders to keep revenue teams focused and adapt where necessary. Anaplan, combined with Microsoft Dynamics 365, helps businesses build a more connected, dynamic revenue strategy that optimizes performance and drives growth.



Building a connected revenue strategy

Anaplan for Sales provides revenue leaders with the ability to build a dynamic go-to-market strategy to reliably drive revenue growth, regardless of what comes your way.

Sales Planning

Optimize territories, quotas, capacity plans, and market segmentation to focus your sales resources.

Sales Incentives

Transform incentives from a line item to a strategic revenue driver by building, modeling, and optimizing compensation plans faster.

Sales Insights

Fill your pipeline with realistic, winnable opportunities and increase the accuracy of sales and revenue forecasts.

Anaplan solutions listed on Microsoft AppSource

Anaplan for Sales Planning

- Quota planning
- Territory planning
- Capacity and coverage
- Account segmentation
- Market scoring

Anaplan for Sales Incentives

- Plan administration
- Scenario modeling
- Sales crediting
- Compensation budgeting
- Adjustments and clawbacks

Anaplan for Sales Insights

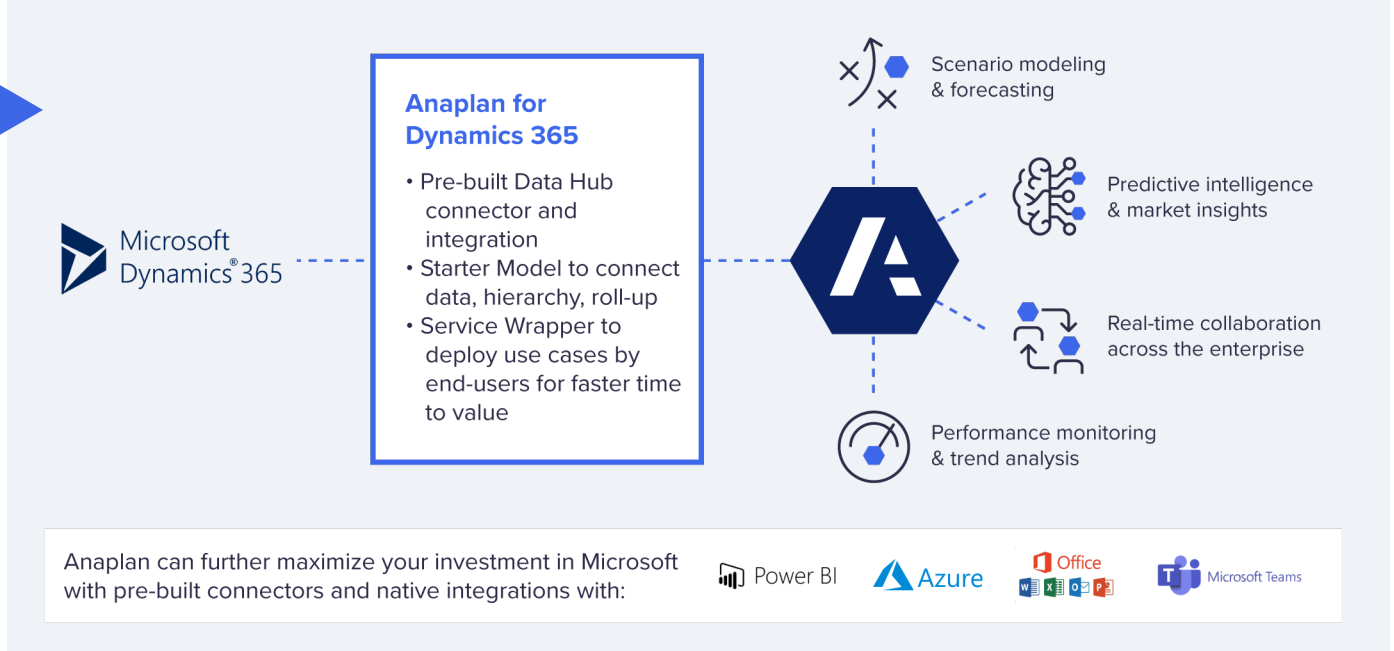
- Sales forecasting
- Sales KPI analytics
- Pipeline optimization
- Deal desk and pricing
- Attainment measures

Anaplan & Microsoft Dynamics 365 technology partnership

Together, Anaplan and Microsoft provide a solution that seamlessly integrates a connected revenue strategy with optimal sales execution to improve go-to-market agility, increase sales alignment, and drive revenue growth.

Anaplan for Sales: Platform capabilities

- Scenario and multi-dimensional modeling, powered by our patented Hyperblock® calculation engine, producing ultra-fast calculations at unprecedented scale so you can anticipate market changes
- Built-in dashboards, reporting, and analytics with data visualization providing a single source of truth on business performance
- Collaborative and agile planning across sales, marketing, finance, supply chain, HR, and other business units
- Best-in-class security and compliance with role-based access control, user management, SSO support with SAML 2.0 compliance and data encryption
- A highly extensible ecosystem: Collect and analyze data in a single location using APIs, ETL connectors, and built-in integrations with other solutions



Integration with Microsoft Dynamics 365

Anaplan has a pre-built integration package with Microsoft Dynamics 365 so your team can get up and running immediately.

Anaplan for Dynamics 365

- Deployable Cloud Package for Anaplan Sales Solutions
- Bi-directional integrations for bulk and transactional API data transfers
- Pre-built Data Hub connector and integration
- Starter spoke models to connect data, hierarchy, roll-up
- Service Wrapper to deploy use cases by end-users for faster time to value

About Anaplan

Anaplan (NYSE: PLAN) is a transformative way to see, plan, and run your business. Using our proprietary Hyperblock™ technology, Anaplan lets you contextualize real-time performance, and forecast future outcomes for faster, confident decisions. Because connecting strategy and plans to collaborative execution across your organization is required to move business FORWARD today. Based in San Francisco, we have 20 offices globally, 175 partners and more than 1,750 customers worldwide.
To learn more, visit Anaplan.com