Oracle Sales Planning Cloud
Advanced Quota Planning

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Engagement Cloud

While quota planning is ideally done as a data-driven exercise, 40% of sales executives rely on instinct when setting quota targets. This can result in sales reps not meeting targets resulting in increased attrition, or reps easily meeting too-low targets, resulting in revenue and payouts that decrease margins. Setting actionable, realistic quotas is mission-critical for motivating and retaining top sales talent. These decisions can no longer be made through error-prone, inefficient spreadsheets, but require advanced planning tools that increase agility and reduce silos.

DATA-DRIVEN QUOTA PLANNING

Oracle Sales Planning Cloud provides an extensible, reliable way to set and analyze data-driven intelligent quotas using best practice methodologies and by engaging key participants in the process, such as Sales Operations, Sales Management and Sales Reps.

Quota planning provides best practice methodologies:

- **Top down**: data driven quota targets based on predicted sales or historical actuals is allocated down to the lowest level in the hierarchy, either automatically or with the option for each management level to pad or reallocate the default distribution

- **Bottom up**: sales reps can propose quotas for their accounts that are collaboratively reviewed and adjusted with managers

Quota optimization tools, such as organization-wide padding, enable modification of quotas in anticipation of known or possible risks. Adjustments can be made for products, accounts, and time/seasonality. Overlay Targets and Quota Attainment Analytics are additional capabilities.

ORACLE CUSTOMER EXPERIENCE

- **Complete:** A comprehensive sales solution focused on driving performance and connecting business processes.

- **Innovative:** Productivity-driven apps offering deep customer insight with the flexibility to adapt and differentiate.

- **Proven:** Power global sales organizations and leverage recognized industry expertise for secure and scalable global operations.

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PRESCRIPTIVE APPLICATION

The application can quickly be configured to enable adjustments to additional dimensions including:

- **Product Hierarchy**: to specify product level quotas either top down or bottom up
- **Account Hierarchy**: to set account level quotas either top down or bottom up
- **Geography Hierarchy**: to spread quotas geographically either top down or bottom up
- **Other Hierarchies**: to accommodate channel, revenue type etc…

IMPROVE MODELING AND ANALYSIS

Sales Planning Cloud includes powerful predictive analytics capabilities to model forecast predictions based on historic actuals. Predictions can be made at the territory level, or at the account level. The system will automatically choose the prediction method that best fits with the available data for the given territory or account, including

- **Simple/ Double Moving Average**: for volatile data with no seasonality
- **Single/Double Exponential Smoothing**: for volatile data with no seasonality
- **Damped Trend Smoothing Non-Seasonal Method**: for data with a trend but no seasonality
- **Seasonal Additive**: for data without trend but seasonality that does not increase over time
- **Seasonal Multiplicative**: for data without trend but seasonality that changes over time
- **Holt Winters' Additive**: for data with trend and seasonality that does not increase over time
- **Holt Winters' Multiplicative**: for data with trend and seasonality that increases over time
- **Damped Trend Additive Seasonal Method**: for data with trend and seasonality
- **Damped Trend Multiplicative Seasonal Method**: for data with trend and seasonality
- **Arima**: for data with a minimum of 40 historical data points, and no seasonality
- **Sarima**: for data with a minimum of 40 historical data points, and seasonality

All predictive planning results can be manually adjusted for modeling of additional scenarios.

Additionally, Smart View for Office enables stakeholders to continue to use Excel and PowerPoint within the planning process, with the latest planning data and assumptions pulled in real time.

DRIVE SALES BY MOTIVATING AND REWARDING TOP TALENT

As a connected part of the Engagement Cloud solution covering the end-to-end marketing, sales and service process, Sales Planning Cloud powers right-sized quotas that keep reps motivated to their full potential. Engagement Cloud's market leading Sales Performance Management capabilities provide coaching, gamification and complete Incentive Compensation capabilities to ensure reps stay motivated, successful and rewarded.

CONNECT WITH US

For more information about Oracle Engagement Cloud, visit engagement-cloud, or call +1.800.ORACLE1 to speak to an Oracle representative.

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