Sales Planning Oracle Cloud EPM

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Set, analyze, and adjust individual and team quotas to motivate sellers and increase their agility. Oracle Sales Planning has the data-driven tools needed to take a top- down or bottom- up approach to quota planning and use predictive analytics to improve modeling and identify optimal territory assignments.

Quota Planning

Ensure sales quotas align with company goals. Conduct top-down or collaborative, bottom-up targeted sales quota planning and allocation by territory, product, account, or other custom dimensions. Use powerful, AI-driven predictive planning capabilities, flexible modeling, and analysis for data-driven quota plans that optimize market and sales territory coverage.

- **Predictive planning**
  Set quota targets based on predicted sales or historical actuals and modify them in anticipation of any known or possible risks. Adjustments can be made for products, accounts, and time/seasonality.

- **Flexible Modeling**
  Use multidimensional and drivable what-if planning by territory, product, account, channel, seasonality, and more.

- **Built-in Best Practices**
  Leverage best-practice planning methodologies, like top-down, bottom-up or waterfall.

- **Data-Driven**
  Calculate quotas that are right-sized and attainable by connecting finance data and using historical actuals to drive the quota planning process.

- **Prescriptive Modules**
  Easily configurable prescriptive modules come with navigation, forms, dashboards and calculation business rules to meet the complexity, scale and structure of your business.

- **Oracle Smart View**
  Using a plug-in for Microsoft Office, you can do your planning directly in Excel and PowerPoint using real-time data.

Related services

The following services extend Oracle Sales Planning Cloud:

- Oracle Sales
- Account & Contact Enrichment
- Address Verification
- Subscription Management
- DataFox for Sales

Quota Planning Methodologies:

- **Top-Down:** data driven quota targets are based on predicted sales or historical actuals are allocated down to the lowest level in the hierarchy, either automatically or with the option foreach 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.

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Key Account Planning

Create better, more accurate forecasts, develop the right promotion strategies, foster collaboration, and run what-if scenarios with a data-driven sales and promotion planning tool.

- **Predictive Baseline Planning**
  Predict sales volumes and corresponding revenue based on statistical forecasting methods across customer segments, product groups, or channels. After estimating a base forecast, make incremental adjustments using building blocks for factors—price, product, or placement— that would affect additional sales or revenue. Do gap analyses between your sales targets and the baseline.

- **Promotion Planning**
  Make data-driven promotion strategy decisions to get the most profitable sales. Add promotions and identify sales uplifts based on those promotions. Run various what-if scenarios by adding, removing, or reassigning different promotions to different products, Build best case or worst case scenarios.

- **Analysis**
  Make the right planning decisions by reviewing trade spend summaries, ROI on uplifts, and customer profit and loss. View promoted and non-promoted volume and revenue as well as analyses across key accounts, product groups, and sales territories.
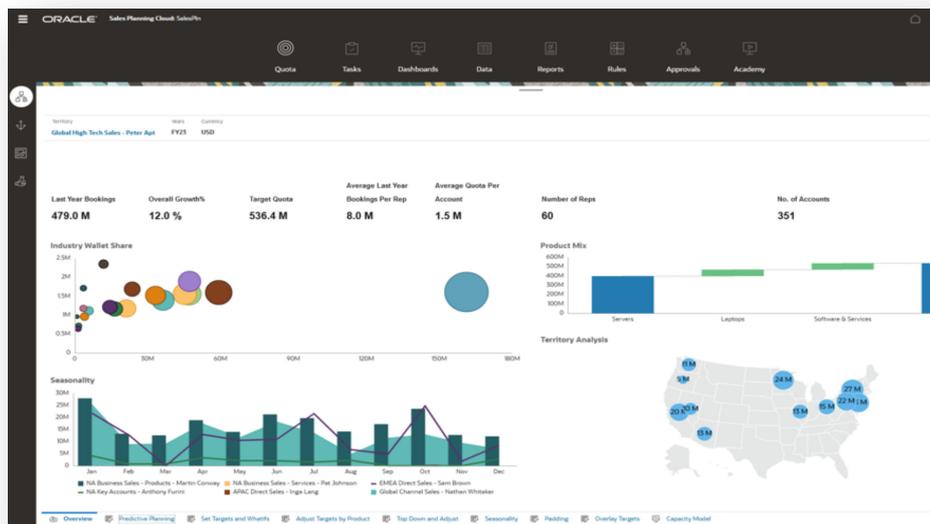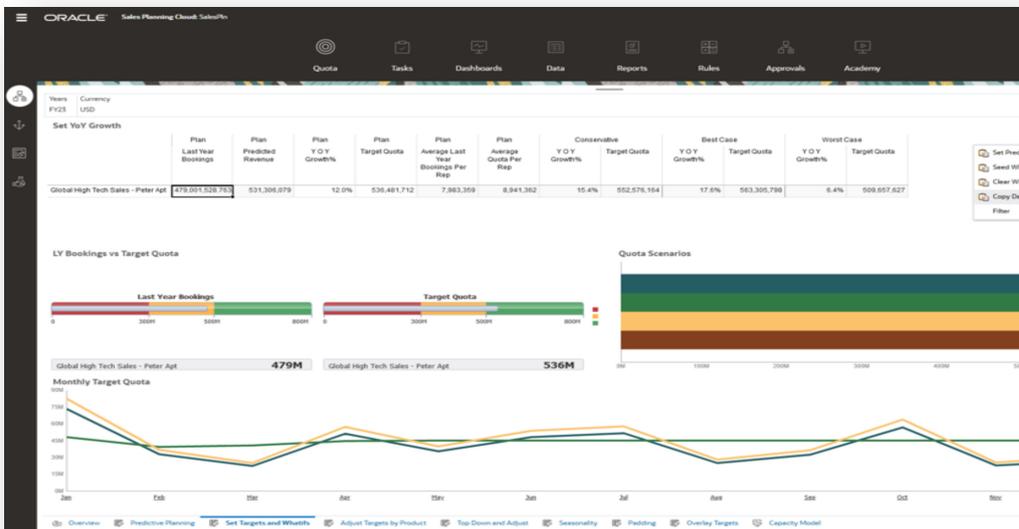

Sales Planning in Oracle Cloud EPM –
Advanced Sales Planning

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Advanced Sales Forecasting

Sales and finance both need more reliable forecasts, along with accountability and improved collaboration between sales management and sales reps. Advanced sales forecasting capabilities use the data from the sales pipeline and financial actuals for more advanced statistical predictions, so you can deliver the most accurate forecasts possible weekly, monthly, or on a rolling basis.

- **Full-picture Forecasts**
  Develop a more accurate and realistic forecast from ERP actuals alongside your CRM pipeline data—without the need for spreadsheets; offline, manual processes; or extra steps.

- **Powerful Foundational Sales Planning Platform**
  Easily switch on additional configurations, such as custom forms and dashboards, measures, dimensions, navigation flows, and Groovy business rules for custom calculations.

- **Detailed, Actionable Analytics and Reporting**
  View current, future, and past forecasts. Compare the latest forecasting data with pipeline and won revenue metrics. View evolving forecast trends with detailed sales revenue models and what-if analysis so you can react quickly to meet your sales goals.

- **Connected and Integrated**
  Offer your sales teams and sales management connected sales planning with integration between quota planning, incentive compensation planning, and sales forecasts.

- **Smart View for Office**
  Use a Microsoft Office interface to access full predictive planning capabilities in Excel or add live data links to PowerPoint.

Sales Planning in Oracle Cloud EPM – Quota Planning

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