

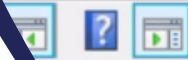
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## GLOBAL TERRITORY PLANNING AND QUOTA SETTING PROCESS

"Anaplan forced us to think about our global territory assignment processes and make decisions on how to ensure alignment across all teams. The tools within Anaplan provide us immediate visibility into our territory coverage."

Citrix Systems, Inc. is an American multinational software company that provides server, software virtualization, networking, software as a service (SaaS), and cloud computing technologies. Citrix solutions are claimed to be in use by over 400,000 clients worldwide, including 99% of the Fortune 100, and 98% of the Fortune 500 companies.



**INDUSTRY**

High Tech, Computer Software



**USE CASE**

Territory and Quota Management,  
Position Management



**TECHNOLOGY**

Anaplan

## CHALLENGES

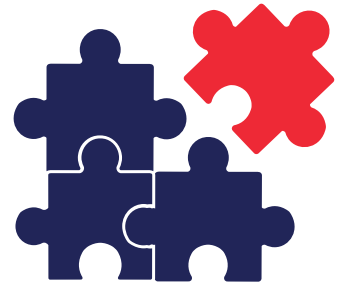
A lack of defined global territory planning and quota setting processes resulted in delayed operational readiness, missed goal sheets, payout adjustments, and increased manual interventions.

The worldwide sales teams used multiple Excel-based territory and quota blueprints to create a territory plan for their geographies, which led to multiple cycles of revisions, coverage gaps, and difficult to maintain assignments during HR-drive events.

## SOLUTION

Anaplan was chosen to streamline the Citrix Sales Strategy and Operations teams' sales planning and operations cycles. The developed models needed to support 340 sales management Anaplan users and 10 super users (using Anaplan Model Builder licenses) within Sales Operations. The primary objectives for the Citrix Anaplan Territory & Quota Management Implementation Project was to:

- Improve territory viability and quota accuracy
- Faster delivery of goal sheets
- Reduce territory update processing times
- Improve field sales management user experience
- Expand overlay mapping options to include specific named account mappings



## RESULT

Citrix's territory and construction, assignment, and optimization processes were redesigned for consistency worldwide, while increasing usability and functionality. Citrix's sales management gained the ability to construct territories, assign and move accounts and representatives to territories, enable name account planning, identify coverage scenario value across territories and accounts, and identify territory changes.

When it comes to insights, Citrix is able to define monthly values of annual quotas based on employee ramping and market seasonality, define data guard rails and limits, measure affordability and profitability metrics for effective quota setting, optimize territories for equitable account assignments and more informed decisions, and quota assignment approval workflow across sales organization.



Accelytics stands for "accelerated analytics." Our team specializes in business process optimization and technology enablement within the scope of supply chain, sales performance management, and financial planning and analysis.

Accelytics leverages its Accelerated Approach methodology to help clients establish industry focused sustainable processes while using technology as a true enabler to the process.

Our experienced team delivers a broad range of services to help clients throughout their entire transnational journey.

We provide solutions that include business process optimization, technology enablement and support services.

Accelytics is headquartered in Houston, TX with offices in Dallas, Denver, Minneapolis and New York.

Learn more at [www.accelytics.com](http://www.accelytics.com).