



# T&Q IN ANAPLAN TO IMPROVE MODEL FUNCTIONALITY AND USABILITY

**"Accelytics fixed a broken model quickly and in-time for our planning cycle. Accelytics allowed us to view account-level performance and set targets in real-time"**

Pitney Bowes provides customer engagement, customer information management, global e-commerce, location intelligence, and mailing and shipping services to approximately 1 million customers in about 100 countries around the world. The company is a certified "work-share partner" of the United States Postal Service and helps the agency sort and process 15 billion pieces of mail annually. Pitney Bowes has also commissioned surveys related to international e-commerce.



**INDUSTRY**

Business Services



**USE CASE**

Account Scoring, Territory & Quota Management



**TECHNOLOGY**

Anaplan

## CHALLENGES

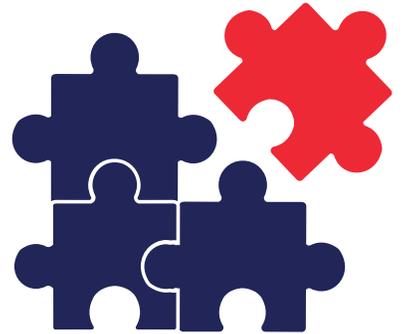
Pitney Bowes started using Anaplan in August of 2016 for account scoring and segmentation, along with territory and quota management. Initially, they worked with another consulting partner to develop their business requirements and build out their Account Scoring and Territory & Quota Management models. Pitney Bowes Global Sales Operations team was currently live with the model, but they were not comfortable using Anaplan due to the model's performance, usability, and logic issues. Pitney Bowes required an accelerated project plan to operationalize a non-functioning model for their upcoming sales kickoff and planning cycles.

## SOLUTION

Pitney Bowes partnered with Accelytics to quickly diagnose, recommend, and implement model updates to turn a non-functioning model into a useful planning solution. Accelytics was quickly able to standardize and optimize their technical and functional planning processes. Accelytics' goal was to get a non-functioning Territory and Quota Management model operational, so that 250+ executive sales team members could track sales performance, manage account coverage, model account assignments, and plan future year account allocations.

The solutions focused on:

- Modifying the model's fundamental hierarchies and lists
- Reducing process complexity and processing times
- Redesigning core calculations
- Restructuring the model to allow multiple user updates



## RESULT

From a non-functioning model, which could not accommodate multiple users or provide actionable sales metrics, Pitney Bowes was provided a fully operational Territory and Quota Management tool.

Specifically, Pitney Bowes gained the ability to view account level summaries across multiple levels, version account-level assignments, track change histories, reduce processing times, and allow multiple users to interact with the models simultaneously without performance degradation. This tool connects the whole sales team and allows for strategic sales performance planning across their worldwide network.



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).