

A pillar of modern sales performance management (SPM):

# Your ultimate guide for strategic sales planning



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# Foreword

Planning in a post-pandemic environment continues to bewilder many sales organizations. The idea that change can simply be “managed” feels more and more obsolete as we expect our processes and people to be perpetually agile and adaptable. Business performance, both in the public and private markets, is highly correlated with adaptability, and sales teams are feeling the pressure to deliver on aspirational targets amid an ever-increasing amount of uncertainty.

An annual cadence to strategic sales planning backed by manual excel processes no longer sufficiently enables companies to plan for the reality of doing business in today’s market. Dynamic sales planning accomplished by incorporating AI into sales performance management (SPM) can produce more accurate and frequent predictions that result in proactive decision-making and actions. Pipeline growing faster than expected? Optimize your capacity planning before recruiting. More people buying online? Shift resources from in-store to online.

As companies and sales organizations grapple with the impact of the global labor shortage, also known as “The Great Resignation,” sales teams struggle to deliver against plans that may be thoughtful but aren’t particularly malleable. In an environment in which seemingly all labor is poachable, the difference between companies that must hire who is available and companies that can hire who they need is the ability to plan with an advanced degree of intelligence and agility.

Transparency of sales performance is also increasingly top of mind as the ability to identify, replicate and communicate successes is critical to growing and motivating a high-performing sales team. Additionally, compliance (like Sarbanes-Oxley) and readiness for potential labor disputes are key drivers of planning transparency. Lastly, sales teams and the customers they serve are becoming more diverse, and the days of shadow processes and institutionalized inequities are waning.

Manual incentive compensation management (ICM) processes are often the forcing mechanism that drives companies to consider a sales performance management (SPM) solution. While the desire to automate these processes makes intuitive sense, it’s important to view SPM not only as a way to automate ICM, but a comprehensive and strategic business solution that correlates data and informs better decision-making.



**Dr. Liran Edelist**

President, Jedox Inc.  
Boston, USA  
[liran.edelist@jedox.com](mailto:liran.edelist@jedox.com)

# Strategic sales planning overview

## The impact on finance, sales, and IT

On the planning horizon, a distinction is made between strategic, tactical and operational planning. Strategic sales planning is considered the engine of the sales organization. It defines the fundamental goals of a company within a time horizon of more than five years, so that you know how much horsepower you can put on the road.

In addition, strategic sales planning ensures that all sales activities are aligned with corporate goals and coordinated with plans and measures of other corporate divisions. Conscientious top-down planning lays the foundation for a successful go-to-market (GTM) strategy. It forms the cornerstone for positioning the company on the market in the long term and ensuring sustainable growth. In the day-to-day business of operational planning and budgeting, where revenues, sales figures, costs and other measurable values determine the path, there is often a lack of alignment with the overarching strategy. The lack of alignment and lack of collaboration between budgeting and sales strategy causes a deficiency in operational excellence that can only be achieved with a clear strategic framework for action. At its best, strategic planning acts as a missing piece of the puzzle, seamlessly aligning with a company's vision, mission and values and providing a clear roadmap.

**Strategic sales planning** is a holistic and structured process that compresses go-to-market plans with specific sales targets, implementing measures and continuously tracking a company's overall long-term goals to deliver competitive advantage.



**With Jedox, we now control our reporting and sales planning efficiently, and we even get thirsty for more data!**

Oliver Dammann  
Sales Controlling  
MBG International Premium Brands

# The challenge of multidimensional complexity

Strategic sales planning often misses the mark for organizations due to one or a combination of three dimensions: business complexity, human collaboration, and data and tools. This multidimensional aspect of a company dramatically increases the complexity of the sales planning process and makes it difficult to implement with manual methods and processes.

## Business complexity

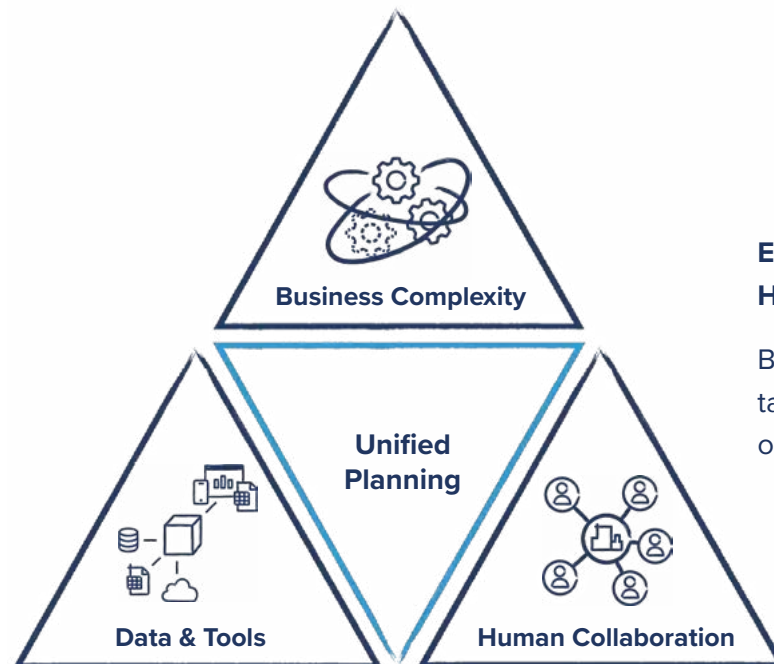
From management and customer expectations to strategy changes and market volatility, business success depends on internal and external factors. These interrelationships influence a business and define organizational complexity. Globalized markets, technological disruption and changing customer demands are making the business environment more complex than ever before.

## Human collaboration

Smooth collaboration between employees is an integral part of the sales planning process. They must share the defined approach. In the individual process steps, they collect data, evaluate it, and thus create the basis for decision-making by the executive board. The collaboration environment should therefore be equipped with the right methods and solutions.

## Data and tools

Planning is only as good as the data on which it is based. A high level of reliability and transparency is the result of a successful planning process. This is often reflected in the tools used for data preparation and processing. The higher the need for coordination in a company, the more a supporting solution is required to handle processes in a standardized and integrated manner.



**Effective planning means operationalizing complexity.**

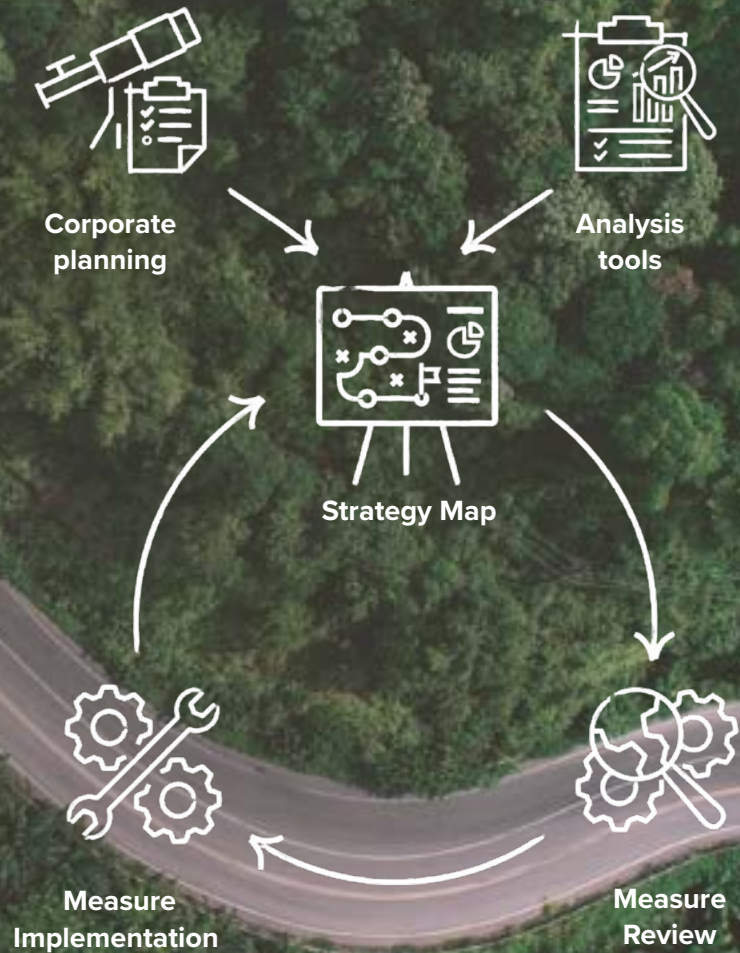
**However, reducing complexity must not be at the expense of quality.**

Based on automated and integrated processes, all three dimensions can be taken into account in a strategic sales planning process and transformed into opportunities for the company.

# Strategy roadmap: five steps of strategic sales planning

The basic framework for improving strategic sales planning is a multistage concept that flows smoothly into operational planning and thus perfectly links the two areas. Each step addresses its own points that need to be dealt with.

How such a concept looks in detail depends on individual parameters such as company size, market cycles and strategic orientation. Nevertheless, we would like to provide you with a general guideline here.



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Jedox is an integral part of our performance management process. I can't imagine our sales department without it.

Christoph Lang  
ERP Project Manager  
allsafe

# #1 Corporate planning

## The foundation of planning

The overarching corporate planning provides the general framework for action – the thrust of the planning of individual divisions and departments is derived from it. In this way, it also forms the foundation for strategic sales planning.

- > What is the purpose of the company?
- > What is the corporate philosophy?
- > What are the unique selling points of the company?
- > What are the overriding corporate goals?
- > What is the company's strategy?

# #2 Analysis tools

## Analysis of the actual and target situation

Internal and external influences determine the gap between the target and actual situation. Within the scope of an analysis – with the help of a handful of instruments – potential levers for the further planning process can be identified.

- > SWOT analysis
- > Sales audit
- > Market and environment analysis
- > Competitor analysis
- > Customer analysis

# #3 Strategy map

## The strategy map as a roadmap

In the concrete planning stage, sales targets are formed and underpinned with the corresponding measures and resources. The corporate goals and analysis results from the first two steps form the basis for this.

- > Definition of sales targets (products, sales staff, sales processes)
- > Formulation of sales strategy, including forecast of results
- > Planning of concrete sales measures and activities
- > Planning of budget and resources
- > Strategic price positioning



## What you can imagine, you can build.

CIO/Head of IT  
utilities industry

### #4 Measure implementation

Now that strategic planning has moved on to operational planning in the previous step, the next step is concrete implementation. It clarifies which measures and activities will be carried out, when and how.

- › Organization of the activities
- › Empowerment of employees
- › Orchestration of the measures

### #5 Measure review

To ensure the effectiveness and efficiency of the selected measures and activities, performance is monitored at regular intervals. In this way, conclusions can be drawn quickly in the event of a lack of success or exceptional success, and the strategy can be adjusted at any time.

- › Monitoring of results by means of quantitative and qualitative targets
- › Initiation of optimization processes if required



# Sales performance management (SPM)

## Maximize business value with collaborative, unified sales planning

With increasing complexity across all sales planning processes, the demand for simplified solutions becomes louder. Fragmented processes and manual tasks make the implementation of strategic sales planning cumbersome and challenging.

Spreadsheets or isolated solutions quickly reach their limits – lack of automation and limited data availability disrupt the planning flow. Strategic sales planning forms the foundation for operational and sales planning and provides a framework for evaluating and controlling concrete measures. By creating transparency based on an integrated solution, you have taken the first step toward breaking down multidimensional complexity.

Unified planning increases efficiency and effectiveness across all areas of the company by supporting employees in planning with a software-based solution. It accelerates and simplifies processes while clearly revealing hidden potential.

Improved sales insights allow accurate planning and profitable forecasts to be derived. Decision-makers have access to up-to-date, secure data and information. This enables optimal control of the customer and product mix, capacity planning and sales cycles.

In talent management, transparent data provides motivation and drive.

In summary, the key benefits of a sales performance management solution are:

- > Enhanced decision-making and trust across the organization through data transparency
- > Simplification through easy integration of multiple inputs into a unified system
- > Agility through real-time planning assisted by AI-based predictive analysis
- > Relief from manual spreadsheet operations through automation

# Benefits of SPM

Not only does the sales department benefit from a sales performance management solution, but also the finance department, IT and human resources. The greatest advantages are more simplicity and optimized resource use throughout the whole company.

## CFO/finance

- › Compliance and audit
- › Simplify plans and process
- › Modeling, what-if simulations
- › Strategic alignment with go-to-market
- › Eliminate manual process errors

## CRO/sales ops

- › Simplify rollout of new plans
- › Improve forecasting
- › Eliminate shadow accounting
- › Accurate, on-time payment, reduce risks
- › Dispute resolution

## CIO/IT

- › Optimize IT resources
- › Rapid deployment, reduce training and consulting
- › Data integrity, controls, security, system performance
- › Digital transformation
- › Improved integration between IT assets (systems)

## Director compensation/HR

- › Ease of use, flexible
- › Improved communication
- › Workflow and documentation
- › Available information and dashboards
- › Transparency

# What makes Jedox stand out?

The Jedox SPM platform allows organizations to align their strategic GTM goals with operational and forecast data. by providing one platform for reporting, incorporating predictive analytics and being user-friendly, thanks to the familiar Microsoft Excel interface.



## **“All in one platform”** Planning, reporting & analysis

Scalability – from a dedicated solution to a complete sales hub



## **Advanced and predictive analytics** Business logic, top-down and AI

“Model anything” – modern business modeling with augmented AI



## **Excel-friendly** 100% designed for business users

Keep the benefits, eliminate Excel challenges



## **Superior technology** Flexible & integrated

Connect any data, real-time updates and simulations

# Success story: allsafe

## Better safe than sorry: allsafe achieves a complete client overview with Jedox

allsafe, a leading provider of complex system solutions, tailor-made individual components, and standard supplies for load restraint, found in Jedox a web-based solution for company-wide budgeting and reporting that is flexible enough to respond to individual and departmental requirements.

Drawing on existing Excel skills, Jedox optimized sales processes, so that personalized, daily reports – incorporating up-to-the-minute financial data from the existing DATEV system – are available at a moment's notice. Thanks to Jedox Mobile dashboards, employees on the go have access from anywhere in the world, as well. The system thus reduces the need for manual data maintenance and enables users to monitor and direct sales strategies from their own workstation.

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The sheer mass of data collected by a manufacturer and the complicated formulas involved brought Excel to the limits of its capabilities. We desperately needed a professional solution.

Christoph Lang  
ERP Project Manager  
allsafe

# Success story: Nölle + Nordhorn

**A dynamic duo: SAP and Jedox Cloud**

**Transparent, timely sales insights through AI at Nölle + Nordhorn**

Nölle + Nordhorn has implemented a solution for sales performance management to gain a daily updated overview of the business areas. The cloud solution uses the company's SAP system as a data source and allows management and field sales easy access to individual reports.

The project team partially automated the extensive sales planning processes with the help of Jedox AIssisted™ Planning. The cloud application uses machine learning algorithms to generate default values based on historical SAP values. The sales representatives can adopt these plan values or adjust them manually.

The sales planning has accelerated greatly thanks to Jedox AI. With around 400 customers per sales employee planned in detail in various segments, it saves a considerable amount of time and reduces the workload for the planners, who can usually limit themselves to a more detailed review of their top 20 to 30 customers. With efficient, detailed planning and precise reporting, there is now an accurate basis for decision-making for different target groups. The increased quality of the reporting content also influences sales meetings, making them more efficient by having consistent figures from a single data source, so everyone in the meeting can discuss the same consistent, current data.

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We are well prepared for further growth, increasing data volumes, and new business challenges, because Jedox Cloud scales to our exact needs.

Bernd Eckert  
Director Finance  
Nölle + Nordhorn GmbH



# Jedox: Key features of an effective solution

Improve your sales insights and look into the future, shorten your budgeting cycles and sharpen your forecast accuracy. Transforming your sales planning with a unified, software-based solution like Jedox adapts your planning processes to the speed of change and takes your sales performance management to a new level.

Jedox enables software-based long-term, top-down strategic sales planning, as well as sales insights and sales forecasts. AI and machine learning support continuous planning and time series prediction for new sales.

Jedox offers you a unified platform for sales planning domains. Become a pioneer in modern sales performance management by optimizing your sales planning with a software-based approach.

## Related Content



### The ultimate guide for sales territory and quota planning

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#### This guide will help you understand:

- › Enable modern SPM with collaborative, unified sales planning
- › Enable sales teams to nurture leads and close deals
- › Increase accuracy and improve sales planning across your organization



### Your ultimate guide for sales incentives and compensation

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#### This guide will help you understand:

- › Overcome common challenges in effective sales incentives and compensation
- › Alleviate concern about inaccuracies in compensation payments
- › Link sales incentives and compensation with SPM

Jedox simplifies planning, analysis, and reporting with one unified and cloud-based software suite. Jedox empowers decision makers and business users across all departments and helps them work smarter, streamline business collaboration, and make insight-based decisions with confidence.

Over 2,500 organizations in 140 countries use Jedox for real-time planning on the web, in the cloud, and on any device. Jedox is a leading Enterprise Planning and Corporate Performance Management solution provider with offices on four continents and with over 250 certified business partners. Independent analysts recognize Jedox for its leading enterprise planning solutions.



**Germany**  
**Jedox GmbH** (Headquarters)

Bismarckallee 11  
79098 Freiburg im Breisgau  
Phone: +49 761 151 47 0

**USA**  
**Jedox Inc.**

50 Milk St.  
Boston, MA 02109  
Phone: +1 857 415 4776

**France**  
**Jedox France SAS**

5, rue Jean Mermoz  
75008 Paris  
Phone: +33 1 47 23 00 22

**Singapore**  
**Jedox Pte. Ltd.**

7 Temasek Boulevard  
#12-01, Suntec Tower 1  
Singapore 038986  
Phone: +65 6803 8632



[www.jedox.com](http://www.jedox.com)  
[info@jedox.com](mailto:info@jedox.com)