



Transforming Sales Planning

CLIENT : Ivanti/LANDESK

INDUSTRY : Technology and Software

Background

Ivanti, which was formed when LANDESK and Heat Software merged in 2017, is a multinational company with products that include an enterprise IT management solution to consolidate device management. It provides IT managers with a snapshot of every device on the network, automates software delivery and integrates IT workflows.

Challenge

As LANDESK, the company had created complex Excel models to help teams set quotas and forecast bookings and revenues for sales. The Excel documents, however, required time-consuming updates and had intricate workflows that not only limited the number of updates but also prevented the company from sharing vital information between teams. The company partnered with ProKarma to find a solution that removed roadblocks in the sales planning process.

Solution

PK transformed the company's sales planning by automating manual processes with Anaplan and establishing best practices that aligned sales team activities with the company's business goals. Powerful data insights from across the global team empower sales managers to make informed decisions and motivate sales teams. Labor-intensive processes have been streamlined or fully automated, and teams have shifted focus from unwieldy Excel documents to sales objectives.

By providing guidance on best practices for data integration, sales performance management modeling and automated processes, PK has enabled better collaboration across the sales organization. With Anaplan and the new best practices now in place, data is updated frequently, and the global sales team can forecast accurately and regularly – both of which resulted in clearer communication and more productive sales teams.