

# TrueQuota

TrueQuota™ provides sales and finance teams with a solution that ensures sales quotas are allocated fairly, timely, and are aligned with corporate revenue goals and opportunities.

TrueQuota is for sales and finance teams that are spending too much time in the quota setting process, often due to multiple spreadsheets, lack of solid historical revenue and performance data, and no effective process. The business impact of not effectively managing quota allocation is often:

- Inability to maximize sales revenue performance due to mis-set sales quotas
- Missed opportunities to pinpoint regional, product or account areas that offer opportunities and optimally set the quota in time for delivery of the comp plan
- Difficult to model and change quotas based on business need - such as named accounts, or product mix
- Incorrect decisions due to multiple and old data from SFA, revenue, and compensation systems
- Inability to ensure that the overall sales number is clearly supported and aligned with business goals, and ensure that each account manager is clearly informed on their goals – resulting in risk in terms of quota and revenue performance

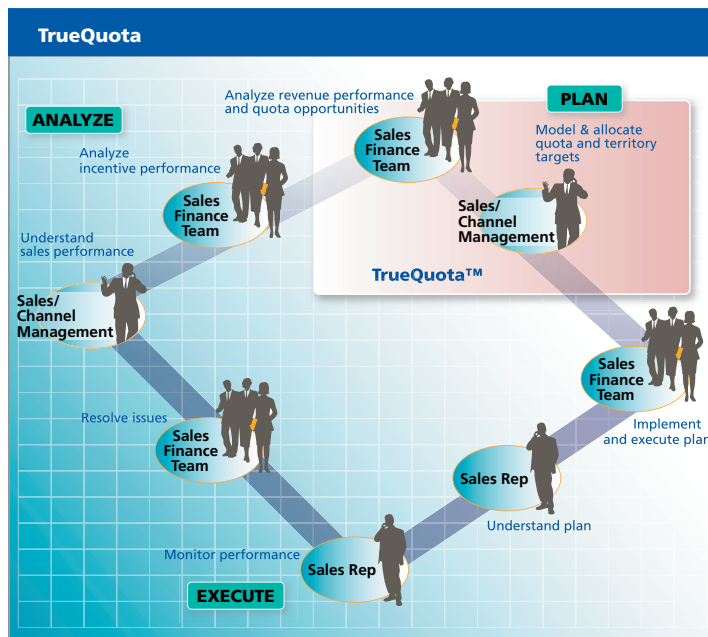
With TrueQuota, the sales and sales ops team can:

- Identify opportunities to change quotas to maximize revenue based on historical performance, and allocate quotas effectively using sophisticated business rules
- Model, compare and select quota scenarios on how best to achieve corporate or sales region revenue goals
- Effectively manage the process across sales teams and regions in a coordinated and timely manner ensuring everyone is bought into the process

With TrueQuota, the finance and comp team can:

- Gain clear up to date visibility into sales quotas and ensure they are in line with corporate goals
- Ensure sales quotas are set appropriately to ensure an over attainment scenario is not reached
- Have a single place of reference for up to the date, approved quotas to be put into effect in TrueComp®





TrueQuota™ is part of the Callidus Sales Performance Management solution to plan, execute and analyze sales and incentive performance

## Key Features

### Analytics and Monitoring

- Supports fact based quota setting using data from revenue systems of record
- Historical analysis of revenue and attainment, identify seasonal or future trends
- Identify opportunities to increase or lower quotas, such as over attainment
- Understand quota distribution across sales team, products, and territories
- Self service performance monitoring for sales management

### Flexible Quota Setting and Approval

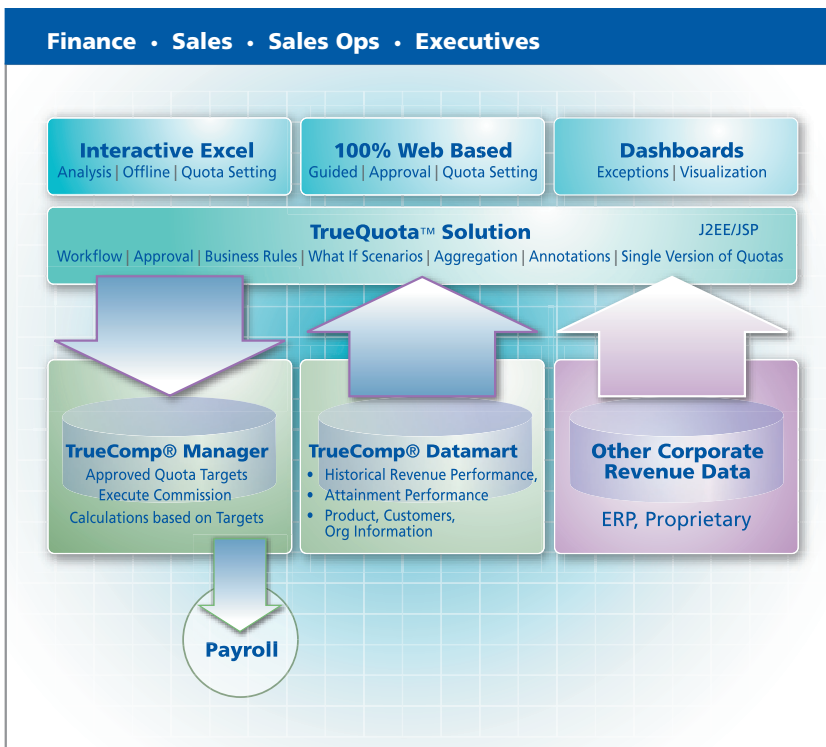
- Configure workflow processes based on quota setting best practices
- Allocation of top down targets throughout the organization, with built in over assignment
- Set and roll up bottom up targets to get high level targets
- Perform variance analysis between targets, YoY etc.
- Create any type of quota, whether product level, account level, or regional
- Use different types of quota measures – sales volume, revenue, margin, customer type etc.
- Flexible calculation engine supports any process and any currency with validation
- What if analysis to test scenario – compare multiple quota scenarios and submit preferred scenario.
- Workflow based organizational approval
- Audit trail and annotation of changes
- Flexibility to make adjustments to quotas throughout the year

### Ease of Use

- Supports a descriptive, guided workflow process ensures process is clear and followed
- Provides robust Excel option to set quotas and analyze performance
- 100% web based for ease of deployment
- Support for offline quota setting for mobile workers

### Integration

- Integrates with TrueComp® revenue and attainment information
- Sources from TrueComp organization hierarchy to ensure plan and execution based on single version of sales team
- Export data from TrueQuota and import into TrueComp for execution of quota in compensation plan
- Integrates with SFA and revenue systems for quota based decisions based on other sources of data



**TrueQuota™ integrates with key system of record and provides insight and management for key stakeholders across sales and finance**

## Key Benefits:

- Alignment of corporate business goals and revenue plans with quota targets to drive better corporate performance
- Reduced quota setting process from months to days
- Freeing up sales management’s time to focus on meeting quarterly goals and driving revenue
- Providing a transparent, automated solution that should build trust within the sales organization
- Improved sales force moral and motivation

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