Simplify territory and quota planning making it fair and equitable

Territory and quota planning is often an overly complicated and laborious exercise that happens at least once a year in every company. When done with spreadsheets and email as is the case in most companies the process takes too long and is next-to-impossible to track. Your sales operations team tends to pore over it for months on end, doing multiple iterations, and more often than not your sales reps do not feel they have a say in the targets they get for the year. This key sales planning process is begging for innovation and Territory & Quota (T&Q) from CallidusCloud can provide the transformation that customers' desire.

T&Q is an end-to-end solution that can simplify sales planning ensuring agility, fairness, and transparency.

Our cloud-based solution is easy to implement and simple to use. With this solution, sales operations gets a scientific and collaborative way to align territories and distribute quotas equitably based on data, metrics, and rules, winning you credibility and trust from the field. T&Q can help you drive efficiencies, increase sales productivity, and significantly speed up the sales planning process.

Key benefits:

- **Speed up sales planning;** reduce administrative overhead

- **Attain fairness and equity** in your territory and quota planning process

- **Ensure your top target accounts** get good coverage and no accounts are neglected

- **Collaborate with the sales force easily** so that reps take ownership of their quotas

- **Connect seamlessly** to the Lead to Money suite

Ease of use and intuitive

T&Q is designed for the business user. The sales operations administrator can easily allocate quotas, assign accounts, change hierarchies, and run reports without writing any code. T&Q offers a prescriptive approach, embedded product guidance, and descriptive hover over text which guides users through every step of territory alignment and quota distribution.

Speed up sales planning

We simplify sales planning not just with an intuitive tool but also with our ability to near automate account assignment and quota calculation. Speed up territory management significantly with rule-based account allocations instead of time-consuming, manual allocations. For quota setting, T&Q comes with a quota recommendation engine that spares you any complex formula writing. With our tool you can shrink the time spent on territory and quota planning from months to just weeks and potentially even reduce the administrative overhead involved in the process. Completing planning earlier also has other benefits; sales reps who were sitting idle waiting for their targets can get productive faster.

Enjoy out-of-the-box reporting

About CallidusCloud

Callidus Software Inc. (NASDAQ: CALD), doing business as CallidusCloud®, is the global leader in cloud based sales, marketing, learning and customer experience solutions. CallidusCloud enables organizations to accelerate and maximize their lead to money process with a complete suite of solutions that identify the right leads, ensure proper territory and quota distribution, enable sales forces, automate configure price quote, and streamline sales compensation — driving bigger deals, faster. Over 3,700 leading organizations, across all industries, rely on CallidusCloud to optimize the lead to money process to close more deals for more money in record time.

Catch inequities in territory and quota allocation

Sales management enjoys out-of-the-box graphical reporting that gives a snapshot of territory and quota allocation across teams and geographies. These reports call out inequities in the system and protects against under-allocation/over-allocation to individual sales reps. Managers can ensure that targets are aligned to corporate goals, all target accounts get good coverage, and none are neglected.

Allocate quotas scientifically and fast

Territory & Quota has a powerful quota recommendation engine that intelligently recommends quotas for individual sales reps based on various metrics such as historical data, CRM opportunity data. Using both backward looking as well as forward looking metrics help ensure quotas are set in a fair and scientific manner both for new businesses as well as existing businesses.
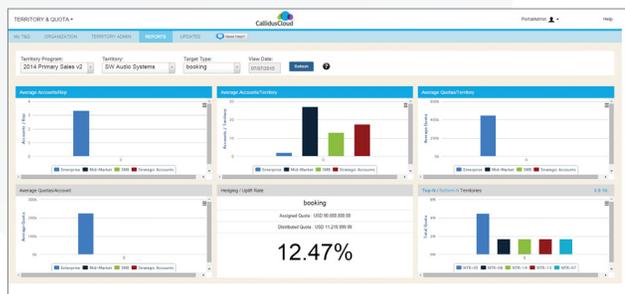
Make collaboration fast and easy

Involve the field in how you set their quotas. Getting their buy in is important so that they take responsibility for their targets. With built in workflow, sales managers can assign quotas giving every sales rep the opportunity to request for change. T&Q ensures faster, more intelligent, and collaborative quota assignment, distribution, negotiation, and acceptance across your direct as well as indirect sales force. The built-in workflow also keeps a record of all change requests and subsequent conversations making every change trackable and auditable.

Integrates to anything and everything

T&Q can integrate to all major CRM platforms, compensation management software, ERP systems, billing systems, and HR systems. With CallidusCloud's enterprise grade Extract Transfer and Load (ETL) tool, Data Hub we have the unique capability to connect to any system that has an API, be it SaaS or on-premise. We deliver out-of-the-box integration with top sales force automation vendors like Salesforce, Oracle, and Netsuite and can integrate with others like Microsoft Dynamics and SAP.

Connect to complementary solutions seamlessly

CallidusCloud provides the most complete and comprehensive suite by far, that allows customers to depend on one vendor to transform leads into money in the company's books. The Lead to Money suite smashes silos within your organization, delivering everything from learning systems, coaching, quoting, contracting, sales enablement, incentive compensation, gamification, to predictive sales performance analytics, all of which together can elevate sales and marketing performance to sell more, faster. You can start with T&Q and add on complementary solutions as you go.

CallidusCloud®