

# Planning to Succeed in Revenue Growth

Aligning the GTM Team  
Around Revenue Performance  
Management

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# The Value of Aligning Sales and Revenue Teams for Success

Revenue is no longer solely driven by the sales team, as for many enterprises, revenue channels now include partners, customer service and success, field service, digital commerce and self-service portals. As buyers are now engaging across multiple channels, it is no longer enough to focus on direct sales, and enterprises should ensure that they maximize revenue opportunities from wherever they originate. Those charged with go-to-market planning need to align across the entire customer journey and all sources of revenue.

**Aligning teams across all sources and channels of revenue is the key to success when it comes to achieving revenue goals.** Ensuring ready access to data spanning all teams involved enables a holistic approach to revenue performance management (RPM) and creates a feedback loop for continuous adjustment in response to market conditions and actual results.

**Takeaway:** Maximizing revenue attainment—whatever the channel—requires aligning teams' objectives, account segmentation and resources.

# One Buyer, Multiple Channels

The change in buying engagement to a multi-channel approach creates challenges for legacy sales performance planning models where the primary engagement model has been through one or two selling teams. The increasing adoption of recurring and usage pricing has changed the economics of many enterprises, resulting in a need to maintain sustained engagements with customers.

**Many departments previously deemed as cost centers are now part of the revenue generation team.** This means that many more employees are now compensated with sales-type incentives based on quota and target achievement. As well as sharing quotas, these non-direct sales also need territory and account assignments. And along with partner channels, resources need to be aligned more accurately against anticipated revenue and revenue generating activities.

**Takeaway:** Additional teams are now tied into revenue generation.



# The Evolution of Existing Planning Models

The reality is that many enterprises already have operations teams responsible for typical activities associated with annual sales planning and for interacting with teams from the office of the CFO, marketing, supply chain and HR. Limited by scope and the tools used, sales performance planning used to be limited to an annual plan for the sales team, with limited collaboration across teams like HR and finance.

**A comprehensive revenue performance management and planning approach is much wider in scope and accounts for the multiple teams now driving revenue.** There are more dimensions to plan for with proactive mid-period adjustments to be made in real time. For example, go-to-market capacity plans must align hiring plans with headcount expense and the capacity of talent acquisition teams to deliver.

**Takeaway:** Collaboratively planning for revenue (instead of sales) is an evolution from existing approaches and may need new tools and applications.

# Know where the data is.

One of the major challenges is that the historic and forward-looking data needed to adequately plan is unlikely to be available from one application or data store. This is data like historical actuals, cost-to-serve of different channels, productivity and headcount expense of different teams, and total customer value as well as intent and signals to establish physical and virtual territories and quotas. Data pipelines need to be established between source systems and application and planning applications. **Given that data is spread across disparate systems, there will be a degree of data cleansing and normalization needed to enable apples-to-apples comparisons and the merging of AI-ready data.**

With all RPM data in one place, other teams can access and harness this data as needed. For instance, marketing can build targeted campaigns more effectively or supply chain teams can better project demand and plan with more confidence. It will also inform operational targets for teams and individuals and feed into incentive compensation assessment, design and calculation.

**Takeaway:** Additional source and target systems need to be integrated into one place to enable more effective planning and performance management processes.





# Ensuring the Feedback Loop

To be a true Revenue Performance Management system, it is not enough to develop a one-time annual plan for territories, quotas, compensation and headcount as results and natural staff movements will necessitate adjustments. **It's about more than just calling your number with the typical bottom-up sales forecast. Now it's about the ability to confidently adapt your go-to-market plans and improve decision-making across other teams in the organization.**

Product and marketing groups may have an interest in aligning go-to-market motions such as product launches. This will enable a better understanding of market penetration and margin implications, as well as the follow-on professional and technical resources required for installation and implementation.

**Takeaway:** Providing a feedback loop of performance against plan will help drive data-based adjustments and more confident decisions across the business.

# Ownership and the Importance of Buy-In

Who owns the revenue planning process to determine targets, budgets and headcount? At a high level, enterprise and corporate targets are owned by the CFO and the executive team. For these to become actionable at the department level, these high-level goals need to be operationalized with more details. As this now affects more than sales, there is a shared responsibility across many teams. **This is why sales operations must evolve to revenue operations to ensure there is collective agreement and buy-in across the different teams.** The ops team should take the lead in syndicating the broader need.

An aspect that any planning process will need to support is the publishing of plans for approval and deployment of plans across teams and hierarchies. This can be as simple as automated notifications and workflow approvals or as complex as a shareable model with the ability to evaluate what-if scenarios for different assumptions.

**Takeaway:** Cross-team “buy-in” is crucial, along with establishing who is ultimately responsible and accountable without taking too much selling time away from individuals.





# Model Reuse and Sharing

Many sales and revenue operations teams have relied on spreadsheets for sales planning and separate systems for sales compensation administration and forecasting. This approach will not be sufficient for go-to-market planning as there are too many channels and variables to manage across spreadsheets. It will be too difficult to integrate actual and projected results with planning processes and data proactively. **Planning and forecasting processes must enable revenue leaders to understand the state of their business in real time, to evaluate multiple scenarios as they adapt to the market, and to reconcile top-down and bottom-up views.**

The results of these planning activities are targets, metrics and programs that will drive revenue. A back office or black box approach will not generate the necessary buy-in.

**Takeaway:** Buy-in from all business leaders and teams is facilitated through use of appropriate technology.

# Keys to Supporting Technology

Applications that are built for Revenue Performance Management and go-to-market planning will have the major planning activity areas pre-defined as functional areas within the product. They should recognize that market sizing and account segmentation are precursors to territory planning and that quotas need to be allocated from overall revenue targets. They should support revenue channels beyond direct sales and incentive compensation, bonus and equity plans that are informed by past results. Capacity planning should include ramp time and statistical linkage to drivers, and there must be methods to identify and act on gaps between approved hiring plans and actuals. **Any embedded functionality must be composable based on a customer's needs without reliance on technical and IT support.**

Data integration will include the ability to access source and target applications and data storage with modern API and error handling support as well as ETL capabilities.

**Takeaway:** Embedded functionality should cover major functional areas with the ability of non-technical staff to compose for their needs.





# What the Future Holds

Complexity is an opportunity for optimizations using AI and AI-ready data. Account intent, territory balancing, channel optimization and forecasting are all areas where machine learning and predictive AI can augment human expertise. Generative AI powers traceable insights, answering questions faster, speeding up planning and enhancing scenario modeling. And autonomous agents can proactively flag anomalies and streamline workflows within and across teams via Agentic AI.

As the focus shifts from sales to revenue, operations teams will benefit from embedded best practices and assisted model building to adapt applications, scenario planning and workflows to the needs of the business. Revenue operations teams will focus less on putting out fires and building plans and more on analyzing, optimizing and syndicating buy-in.

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