

# Sales Forecasting & Analysis

Adaptive provides complete sales forecasting, quota planning, analytics and reporting, all unified with Salesforce. Drive sales operations productivity, improve forecast accuracy, accelerate quota planning, and power alignment between Sales and Finance all in the cloud.

## Adaptive for Sales Forecasting and Analysis

Elevating sales performance starts with adding sales planning and analytics to Salesforce. At Adaptive, our sales planning and analytics not only integrates with Salesforce, but has the power to link Sales with Marketing and Finance to plan revenue and forecast results.

### Completely Integrated

Adaptive connectors integrate with Salesforce to automatically import key data such as leads, opportunities, customer wins, sales rep compensation details, custom fields and more. Better yet, it's all available from within Salesforce with just a click, for seamless access to sales plans, KPIs, and opportunities in one unified experience.



Fully Certified on AppExchange



Analyze metrics across time periods in real-time

### Powerful Sales Forecasting

Adaptive's powerful calculation engine makes calculating the forecast easy based on Salesforce opportunity amounts, units, or custom metrics.

- Model and compare various forecast scenarios using different rates or detailed business drivers
- Forecast by product, region, territory, sales stage, and more
- Factor in multiple revenue types one-time revenue, recurring revenue, or percent-complete revenue

### Smarter Quota Management

Adaptive streamlines the quota planning process and aligns sales operations and management to make quota planning a team sport.

- Set bottom-up quotas or top-down allocations aligned with revenue goals
- Assign team-based or individual quotas, factoring in for over-assignment
- Account for new hire ramp rate in the quota setting process
- Model payout rates for commissions based on different scenarios

## Sales Forecasting & Analysis

### Comprehensive Sales Analytics

With Adaptive, your sales operations team and leadership get full-fledged analytics on sales opportunities, actual versus sales plans, quota information, and the forecast.

- Drill deeper on the fly into revenue trends, conversion, and forecast variances
- Complete array of visualizations by geography, product, channel, and more
- Use statistical analytics to see trends

### Advanced Sales Reporting

Adaptive's drag-and-drop builder makes reporting easy and helps you drive better forecast accuracy.

- Use versions to create snapshots in Adaptive from Salesforce for point-in-time pipeline comparison broken out by the dimensions that matter
- Drill down into the details in real-time
- Continually monitor sales performance with waterfall reports that you can slice and dice to get the critical information you need most

**“We have been using Adaptive for our sales, demand gen, operational and financial planning for a few years now. The app has allowed us to take data from Salesforce and mash it with other data from across the organization to generate more detailed analysis, deeper business insights, and greater accuracy in our forecasts.”**

—Bas Brukx, CFO, Clarabridge

### Key Features

- Deploys as a tab in Salesforce for seamless access
- Use top-down drivers to create forecasts that extend beyond the time horizon of Salesforce data
- Store snapshots of data for pipeline trend analysis
- Benchmark rep conversion rates by stage or percent quota attainment
- Set quotas by individual or group and allocate from the top down or drive from the bottom up
- Create what-if scenarios to assess the impact of key drivers on revenue and expenses
- Automatically consolidate detailed or summarized data across Sales and Finance
- Visualize sales data with interactive dashboards track trends, then adjust your forecast in real-time

### Complete Sales Alignment

Adaptive provides complete performance management, so you can plan both revenue and expenses smarter to drive overall profitability. Align sales activity to sales spend and cost of sales to help executives improve their visibility into the overall sales cycle and better understand key changes in the pipeline between periods. We're the perfect partner to help you drive better sales execution and ensure everyone is working together.

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