

# THE HOLY GRAIL

WITH AGILE CORPORATE PLANNING TO DIGITALIZED SALES

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**Reporting is a tedious topic. But even though it causes a lot of work, it is ultimately an indispensable element of the basis for decision-making and action in companies and organizations. It enables important analyses and is the basis for trend-setting activities and thus also for company growth. But no one has the time to deal with it. And the desire to do so even less. Nevertheless, reporting and, of course, planning are part of daily business. The sales manager in particular has a duty to regularly inform management about current plans and sales figures, because the key figures from sales are largely responsible for how a company does business – what it can afford. Valid sales reporting is therefore more than a tedious “nice to have”.**

This necessity is in conflict with what sales has on its list of priorities – namely selling products and realizing the best possible revenue. As a result, the interest of many sales staff is not in administrative activities, but in sales, especially since sales specialists are usually paid on a commission basis. The fact that – as studies show – up to 30 percent of working time is spent on monthly reporting is therefore counterproductive. But why is that and what can be done about it?




In many cases, this is because the degree of automation of the tools used to create reports is insufficient. This is where modern solutions for agile corporate planning can help. They not only simplify the documentation of results, but also ensure more flexibility in planning. The importance of maximum agility was poignantly revealed by the short-term restrictions in the economy caused by the pandemic. Precisely because it was difficult to exchange information spontaneously on issues, the vulnerability of manual processes became apparent – and the call for automation and digitization grew louder.

But regardless of this specific and still ongoing challenge, there are numerous reasons to digitize your sales sooner rather than later.



“With our solution, we provide sales staff a tool that supports them in documenting their activities in the long term. QVANTUM ensures that forecasts can be set up more easily and reports can be prepared more straightforwardly. This allows administrative tasks to be completed more quickly and the sales specialists to concentrate on their actual business, which is sales.” **Ralph Schall, Success Manager at QVANTUM**

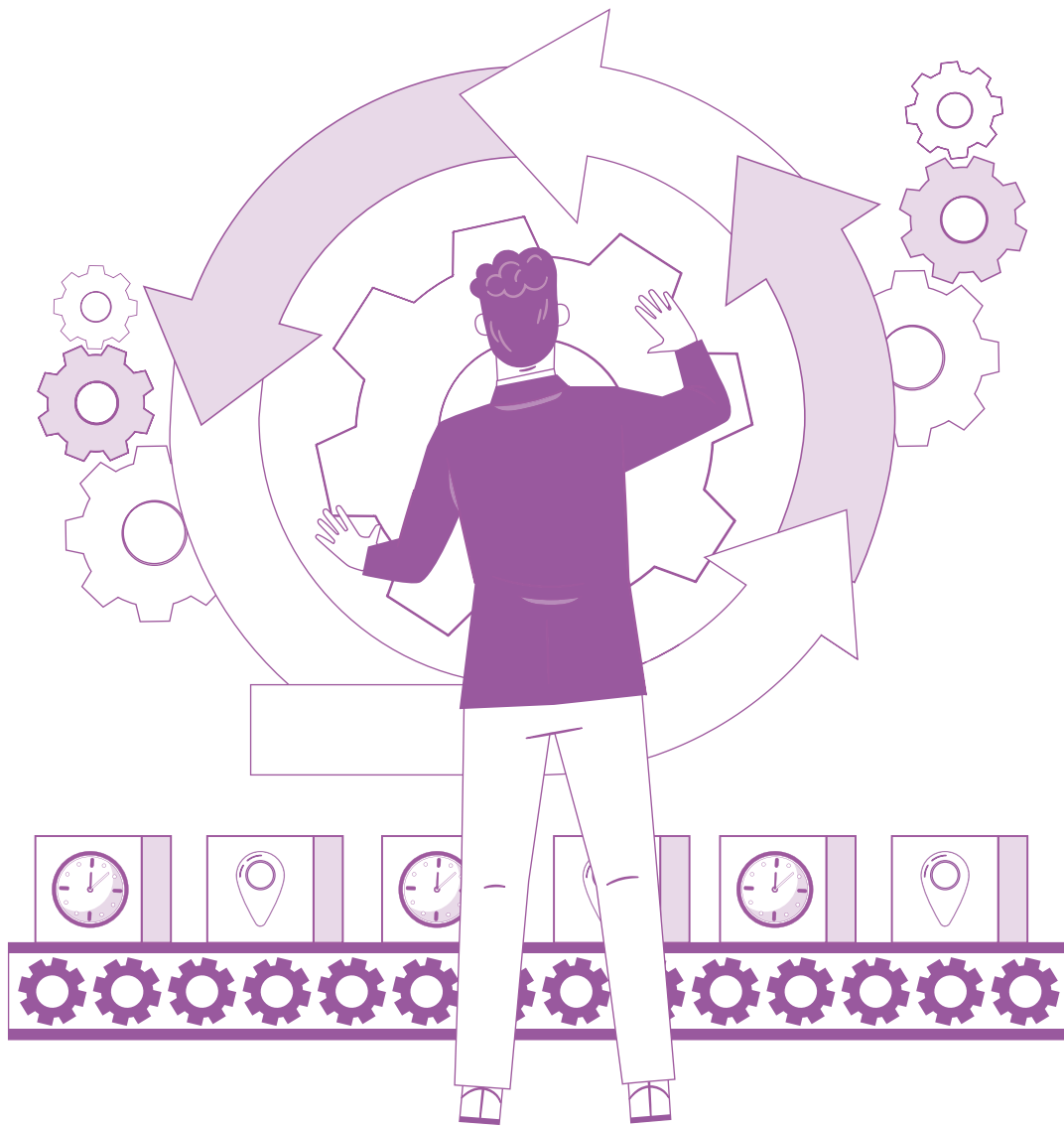


### **Five basic sales challenges**

In the public image of a company, it is important that information is not only correct, but also consistent and comprehensible. Since the sales department plays a significant role in how the public perceives a company, sales staff in particular must always be up to date with the latest information. But this is not the only challenge they face on a daily basis.

#### **1. Companies must remain competitive**

One factor for success that is becoming increasingly important in today's economy is the speed of operating on the market. Consequently, a company's sales department must also be faster and better than the competition.



## **2. Ineffective, manual processes must be avoided**

However, this claim is all too often hampered by outdated sales processes that are largely based on manual tasks and coordination processes. They need to be replaced by highly integrative platforms or solutions. This automates sales workflows, improves collaboration efficiency, and enables greater agility.

## **3. Sales and operations must work hand in hand**

However, it is not only within the sales organization that processes need to be automated. Coordination with other areas of the company should also be raised to a new level. Sales should not make promises to its customers that ultimately cannot be kept. That's why sales staff should always know how things look in production and whether, for example, promised delivery dates can be kept. The implementation of a central platform and the application of important communication principles can also provide support here.

#### 4. Inconsistency and silo structures must be eliminated

Applied to the entire company, this approach means that the introduction of a uniform planning and reporting system can break down walls and close gaps. This can be achieved, for example, with QVANTUM's agile corporate planning platform. It ensures reliable figures in real time across organizations and thus reduces inconsistencies.

#### 5. Pressure from stakeholders must be reduced

Expectations on the part of management or stakeholders with respect to sales are usually very high. The only way to counter this is to let the numbers speak for themselves. But if the effort to determine these KPIs is too great or they have no real significance because they are too old, sales will have a hard time. Companies in which salespeople can draw individual reports from real-time figures have a clear advantage here.



## Excel – don't condemn, but refine existing knowledge

Anyone wanting to meet these challenges and introduce QVANTUM's agile corporate planning will benefit many times over. If playing catch with Excel, correcting plan data and playing email ping-pong previously consumed a lot of time, QVANTUM makes the process lean because data is acquired in a structured manner in a secure environment. In addition to the newly gained agility and reduction of administrative tasks, a major advantage is certainly the fact that the platform can be introduced during ongoing operations. No IT resources are required for this, nor do downtimes have to be scheduled. Implementation is possible "on the fly". Why is this? Because QVANTUM has many similarities to Excel and therefore existing data and information can also be transferred trouble-free. The proximity to Excel also helps with subsequent use, because the knowledge and skills that sales employees have acquired in the creation of planning, forecasts or reports can also in part be used in QVANTUM.

## It all depends on how it's presented

Figures and data on the screen are only useful if they can be easily and quickly grasped and interpreted by the viewer. A spreadsheet with a huge pile of data is extremely unfavorable for this. That is why the possibilities of a dashboard display are more than helpful. They help to present forecasts, customer information and reporting more clearly. Thanks to clear and immediately comprehensible visualization of the most important data, analyses can be carried out and forecasts derived. This helps both the sales staff for their personal planning, i.e. in terms of effort, sales and, if applicable, commissions, as well as for basic corporate planning. But reporting also benefits because results and KPIs can be presented and interpreted more easily. Hence: Although the effort involved in migrating sales administration from Excel to QVANTUM is only minimal, planning and reporting activities are digitized and taken to the next level. What more could you want?

“With QVANTUM, a classic sales forecast is not only easier to set up and continuously maintain, the whole process is also faster and more transparent. QVANTUM helps to collect the various planning figures, whether from sales or other areas of the company, and to present them consistently and clearly.” **Ralph Schall, Success Manager at QVANTUM**

## Less is more: less administration – more output

The introduction of QVANTUM agile corporate planning provides numerous advantages:

- Facilitates the creation of forecasts
- Supports the implementation of individual sales activities
- Enables reporting updated daily at the push of a button
- Accepts data from Excel
- Makes detailed sales, resource and time planning possible
- Enables agile planning scenarios
- Provides new insights
- Facilitates personal work management
- Improves collaboration within sales and beyond



## **Step by step towards agile sales planning**

Sales planning and reporting with QVANTUM are extremely simple – both in terms of implementation and use. The solution runs in the cloud, so no requirements apart from internet access and a standard browser are necessary. This makes it easy to optimize the tasks associated with planning and reporting.

*What needs to be done if you want to implement QVANTUM in a sales organization?*

### **1. Onboarding**

First of all, it should be clarified in an initial non-binding discussion with a specialist from QVANTUM whether the solution has all the options required to create the desired agile sales planning. A question catalog that maps the various aspects and scenarios helps here. It is also important to describe the individual requirements as precisely as possible in this first phase and to have their implementation appear in QVANTUM. Planning and reporting scenarios are then developed together so that the best possible assessment can be made of the issues that the software specifically solves.

### **2. Data transfer from Excel, etc.**

Data transfer takes place in the second step. In most cases, this is done from Excel. Generally, a QVANTUM sales engineer creates a model with the master data from the planning scenario. If necessary, however, companies can also prepare their data themselves so that it can be transferred to QVANTUM. The most important thing, however, is that all previous knowledge and specific Excel knowledge is also advantageous when using QVANTUM. As a result, the vast majority of users will be able to use the tool even when data transfer is taking place and will not require extensive training.

### **3. Creation of a prototype**

The QVANTUM team then checks how the sales process is structured and where it needs to be refined. Depending on requirements, individual planning scenarios or reporting templates can be added. Finally, a prototype is developed that includes all important planning components and reporting templates. The system then goes live and work can begin.



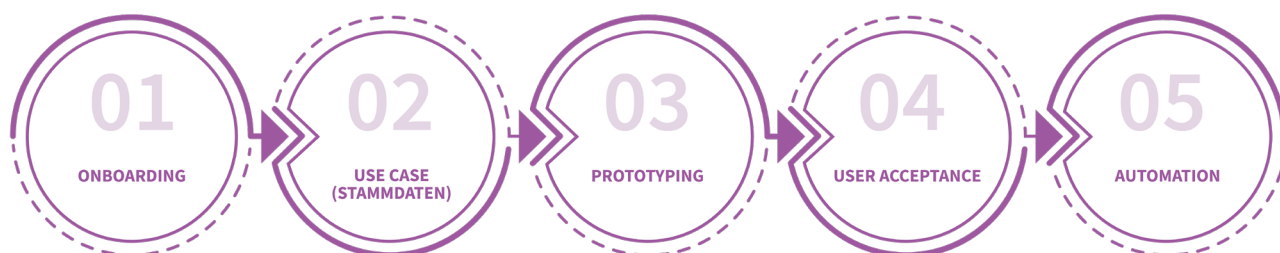
#### 4. Get a taste and get started

The various planning and adjustment scenarios can then be filled with life, i.e. figures. You will be able to see the first improvements after only a short time. Especially when it comes to adjusting plans or correcting sales, the benefits of QVANTUM are quickly apparent. If you want, you can already determine the solution's ROI in this phase. You will then, even in retrospect, have good arguments to present management.

#### 5. Automation

Finally, before the entire sales organization is working with the new planning model, additional features can be connected, additional use cases created, and integration with other applications implemented. This enables a maximum level of automation, which frees up sales staff for other activities.

Anyone who goes down this road not only generates ultimate added value in terms of daily business in sales. In fact, it also lays the foundation for realigning the sales organization – with an eye to the future.




#### The Holy Grail - digital sales

Digital sales is commonly defined as sales that use digital channels to sell products. However, anyone who digitizes not only sales, but also internal processes – i.e., forecasting and reporting – not only fulfills the compulsory, but also completes the freestyle program. Many companies even go so far as to call this completely digital sales process the Holy Grail. Why, and what do they mean by that? According to legend, the Holy Grail is a vessel with miraculous powers from the 12th century, which, according to Arthurian legend, would bring salvation to the knights. In a figurative sense, this means that anyone who succeeds in aligning their sales activities digitally across the board will reap enormous benefits.


But how does that work? Anyone who digitizes their planning and reporting has already initiated the essential changes. Unlike individual and manual planning, which can only be adapted to changing conditions with a great deal of effort, planning software such as QVANTUM not only offers flexible adaptation options, but also maximum transparency. This helps in many ways: On the one hand, sales staff always know exactly and in real time how their sales situation compares to planning. This allows them to better plan their own activities and also able to provide more information to sales management and the executive board.

On the other hand, they are also in a position to adjust their planning in the event of changes and to see what the consequences are and, if necessary, which areas of the company are impacted. A positive side effect is that forecasts are much more informative than usual, which ensures that the planning based on them is of better quality. This new agility also raises collaboration between sales and other departments to a new level. Because the current and continuous exchange between departments is based less on assumptions and more on a valid data basis, everyone involved finds it easier to achieve results. What's more, everything is traceable and can be output in reports at the click of a mouse – for sales, management or other departments affected by sales activities.

Any company that wants to reduce the workload of its sales department and make it fit for the future should do its planning in QVANTUM today rather than tomorrow.



QVANTUM is based on the “single source of truth” principle. This has the advantage that planning, forecasts, customer projects, sales, reports, etc. are recorded and stored in one place. This not only keeps everyone well informed at all times, but also makes it much easier to change plans. This agile form of sales planning gives sales – and thus the entire company – the dynamism it needs to hold its own. Companies that rely on agile planning in sales benefit not only from greater flexibility and less effort. The greatest added value is the innovative character that radiates into other areas of the company through the digitization of sales. **Ralph Schall, Success Manager at QVANTUM**





## About QVANTUM

QVANTUM is a solution by Thinking Networks AG, which is headquartered in Aachen, Germany. Since 2018, QVANTUM has stood for innovative, digital and agile corporate planning with its software-as-a-service. Using a cloud-based solution, QVANTUM replaces manual and ineffective planning processes.

With QVANTUM, companies take their operational planning and related processes to the next level and ensure high and continuous value creation. Real-time planning enables them to fully realize their business potential and actively exploit competitive advantages and opportunities.

QVANTUM corporate planning is in use at German and international organizations, including SALOMON FoodWorld, ONSKINERY and Babor. QVANTUM is the ideal corporate planning solution for organizations of any industry and size.

Learn more at [getqvantum.com](https://getqvantum.com)



## You have questions? Get in touch!

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