

Jedox Planning for Salesforce

Fast. Integrated. Smart.

Make sales planning and performance management seamless

For today's sales leaders, making company goals actionable for sales teams and tracking the results transparently are key priorities. Yet even if you have a world-class CRM like Salesforce, that is often easier said than done. Translating strategic and financial goals into specific sales targets, quotas, and processes for various territories and products is no small task. And aligning to strategy is difficult to say the least when sales, strategic, and financial planning work with disparate systems and data.

What if you could enrich your Salesforce CRM with Sales Planning and Performance Management?

Jedox connects the missing dots to make sales planning and performance management seamless and reveal the complete picture. It allows you to plan, track, analyze, forecast, and manage sales in line with corporate goals – directly from your Salesforce system. Flexibly set sales targets from the top down and collect bottom-up budgets from your team for any level, and any combination of products, territories, and accounts. Since Jedox connects Salesforce directly to financial and operational planning, you also ensure strategic alignment and integrated performance management across the business.

Introducing: Jedox Planning for Salesforce

Jedox Planning is the fast, integrated, smart sales planning and performance management solution for Salesforce Lightning and Salesforce Classic. With Jedox, you streamline planning and budgeting cycles, increase forecast frequency, and keep your team on track to meet targets. Best of all, you can say goodbye to cumbersome, offline number-crunching once and for all.

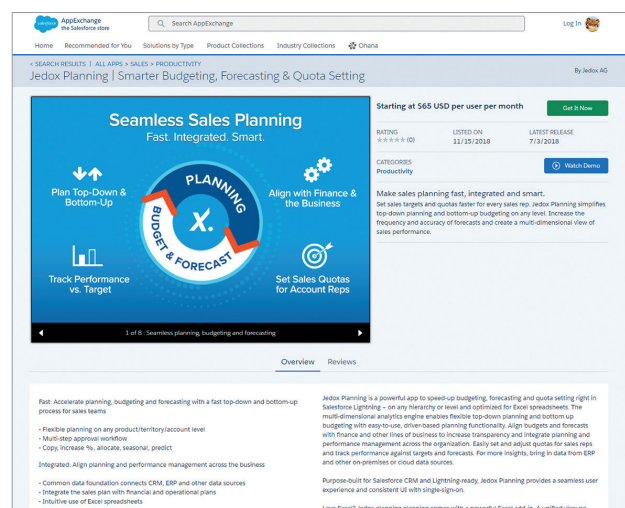


Fig #1: Jedox Planning for Salesforce App in AppExchange

Jedox Planning for Salesforce at a Glance

Powerful:

Streamline target setting, planning, and forecasting

Smart:

Get a complete view of performance from lead to cash

Embedded:

Enjoy seamless sales planning and performance management in Salesforce

Connected:

Create one source of truth
across Salesforce CRM, ERP,
and other systems

Collaborative:

Integrate performance management for sales, finance, and operations



Seamless Sales Planning, Budgeting and Quota Setting

With Jedox Planning you quickly set targets and quotas on any level for any combination of account owners, territories, products, product groups, and accounts. Streamline top-down planning and bottom-up budgeting with powerful functionality embedded in Salesforce.

KEY FEATURES:

- ▶ Copying previous year values
- ▶ Increasing values by percentages
- ▶ Allocation of targets with seasonal or custom distributions
- ▶ Flexible quota setting
- ▶ Workflow, email notifications, and data validation
- ▶ Role-based access and rights for teams

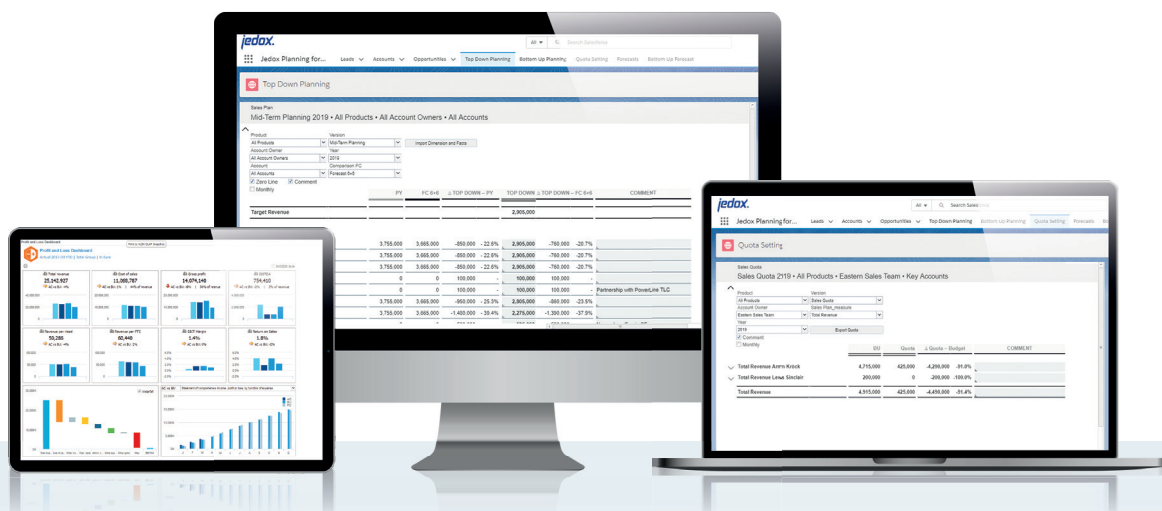


Fig #2: Planning and quota-setting in Salesforce

Seamless Sales Forecasting and Performance Management

Jedox not only simplifies target setting and quota setting for everyone in your team. It extends the capabilities of Salesforce to create a truly multidimensional picture of sales performance. Performance tracking and reporting along with pipeline, opportunity, and customer analytics help sales teams become more effective in meeting growth targets and company objectives.

Quickly analyze performance and compare forecasts to targets. Use smart predictive analytics for guidance to create accurate, dynamic sales forecasts. Share rolling forecasts and reforecasts seamlessly with finance and business operations to enable dynamic enterprise planning and performance management across the organization.

The powerful in-memory technology in Jedox integrates information from Salesforce, ERP, and other on-premises or cloud-based systems and data sources to build a consistent data foundation and one version of the truth.

KEY FEATURES:

- ▶ Connect data from Salesforce CRM with ERP and other sources for reporting
- ▶ Create performance report versions such as target, actual, and forecast
- ▶ Freeze performance reports in time to compare with the next period
- ▶ Integrate real-time data to increase forecast accuracy for the next period
- ▶ Use predictive analytics as guidance for faster, more frequent forecast cycles

Create fast and actionable performance analysis, reports, and forecasts from lead to cash.



Fig #3: Performance tracker and sales reporting

Seamless Enterprise Performance Management

Aside from accurate, high-frequency sales performance data and forecasts, operational levers such as sales incentives, marketing budgets, inventory, production, and new hires are also critical inputs for financial planning and analysis.

Sales performance data and forecasts are not only critical inputs for financial planning and analysis, but also the basis for operational decisions such as sales incentives, marketing budgets, inventory and production, new hires and more.

As a leading software platform for Enterprise Performance Management, Jedox integrates strategic, financial, and operational goals and makes planning seamless for sales, finance, human resources, and supply chain.

- ▶ Sales increases forecasting frequency and accuracy while reducing the burden of planning, budgeting, and reporting
- ▶ Finance optimizes financial planning and analysis for better business decision support
- ▶ HR gets insights for headcount planning and personnel costs for improved capacity planning
- ▶ Supply chain obtains a clear view of demand, production, inventory, and logistics planning to enhance the service to customers at a lower cost

Integrating sales planning and performance management with finance and operations unleashes more agility and efficiency throughout the business. Discover which operational drivers are directly connected to financial and business results and use smart insights from rich data analytics to make faster, better decisions.

Better together: Jedox EPM + Salesforce CRM



CRM:

- ▶ Quotas
- ▶ Forecasts
- ▶ Territory Management
- ▶ Opportunities & Pipeline
- ▶ Deals Closed

Sales Teams



EPM:

- ▶ Plans
- ▶ Budgets
- ▶ Integrated Performance Management
- ▶ Ad-hoc Analytics
- ▶ Standard Reports



Benefits of the Salesforce + Jedox Solution:

- ▶ Planning, Budgeting and Forecasting Workflow
- ▶ Top-down target and quota setting
- ▶ Continuous performance tracking vs. budget and forecast
- ▶ Connected data for planning, analytics & reporting



Jedox – The Top-rated EPM Software Platform. 97% of users recommend Jedox.*

Jedox is a modern Enterprise Performance Management software platform enabling businesses to translate strategic company goals into targets for each line of business. Jedox makes planning and performance management seamless by sharing insights, enabling streamlined, consistent processes, and integrating data sources and systems. Jedox empowers users with intuitive analytics, planning, and reporting tools in a modern web interface, optimized for mobile, and for native Microsoft Excel.



Embrace Microsoft Excel: Jedox Excel Ribbon

With Jedox, spreadsheet fans can continue to work in their familiar Microsoft Excel environment. Through a Microsoft Excel Ribbon, they can access the full spectrum of planning, analytics, and reporting capabilities and stay connected to the Jedox in-memory database. This combines the flexibility of spreadsheets with the advantages of an enterprise-class planning solution such as powerful data integration, role-based access rights, workflow management, and audit trail. What's more, they can easily collaborate with colleagues on the web or mobile devices in real time.

What customers say

"The way we used to create cycle books was very time consuming. With Jedox, the process is automated and only takes ten minutes. We also use the software to make customer segmentations that address country specific requirements."

Stefan Thaler, CRM Manager, EVER Neuro Pharma



"With Jedox, we always know the status of our sales projects and can respond with targeted, timely actions."

Thomas Kremer, Head of Sales Controlling

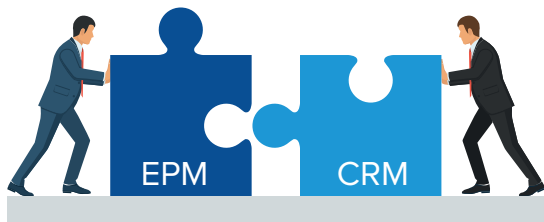


* BARC, The Planning Survey

Why combine the #1 Salesforce CRM with the #1 Jedox EPM system?

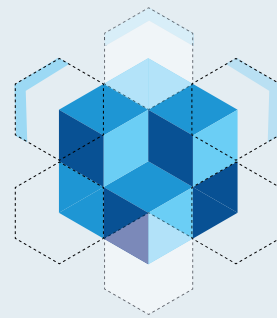
The future of sales is about smart insights and the ability to quickly adapt to new requirements with increasingly automated sales performance management from strategy to action. Combining Salesforce CRM with Jedox Enterprise Performance Management lays the foundation for a new type of integrated sales performance management platform.

4 Benefits of Integrated Sales Planning and Performance Management



Consistent Data Foundation

Bring CRM and EPM data together into a single source of truth for planning, analytics and reporting



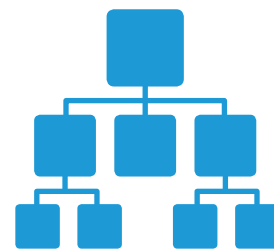
Extended Reporting & Analysis

Share smart insights across the business and enable self-service analytics



Bridge the Gap to Finance & Operations

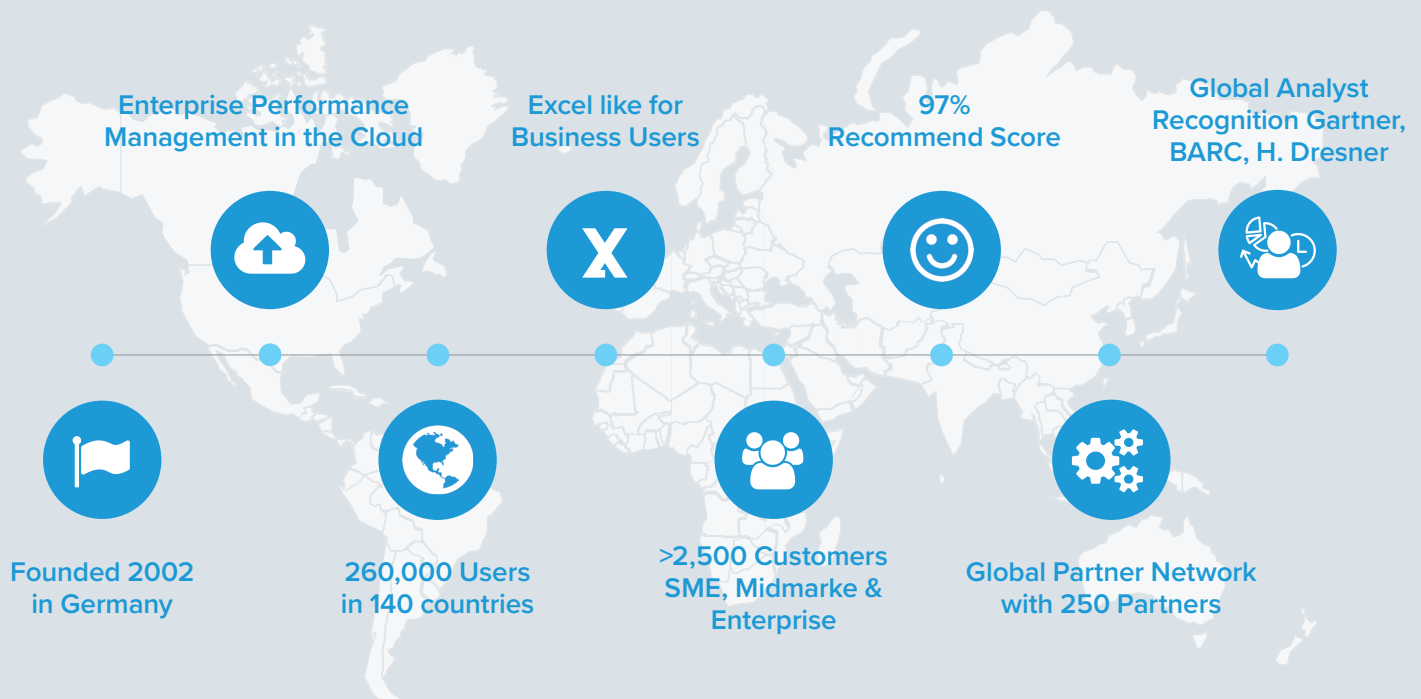
Integrate performance management and focus on operational drivers



Align Strategy & Execution

Develop recommendations for action and automate reporting processes

About Jedox



Jedox simplifies planning, analysis, and reporting with one unified and cloud-based software suite. Jedox empowers decision makers and business users across all departments, helping them work smarter, streamline business collaboration, and make insight-based decisions with confidence.

Around 2,500 organizations in over 140 countries use Jedox for real-time planning in the cloud, on the web, and on any device. Founded in 2002, Jedox is a leading provider of Enterprise Performance Management software that incorporates business intelligence in one integrated solution. Locations on four continents and a worldwide network of over 250 business partners underline Jedox's international orientation. Independent analysts recognize Jedox for its leading enterprise planning solutions.

Simplify planning with Jedox and start your free trial today:
www.jedox.com

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