

Increase Confidence and Accuracy of Your Revenue Plan

CRM-Driven Revenue & Resource Planning: Purpose Built for Services Companies

Key Benefits

- > **Accountability** – Create transparency in goals/forecasts based on real-time reporting and scenario planning
- > **Integration** – Monitor a comprehensive view of your data with CRM powered by CPM
- > **Automation** – Flexibility to identify trends and evaluate assumptions with a consistent revenue plan model
- > **Accurate Allocation** – Manage quotas, opportunities, and deals to accurately predict shifts in resources
- > **Rapid Deployment** – Ensure success with pre-built integrations, ProServ industry expertise, and a prescribed fixed scope offering
- > **Dashboards** – Track performance and align metrics against company objectives with instant data monitoring

Deliver Accurate Revenue Plans through Collaboration

Vital to the Offices of Finance, Operations, and Sales

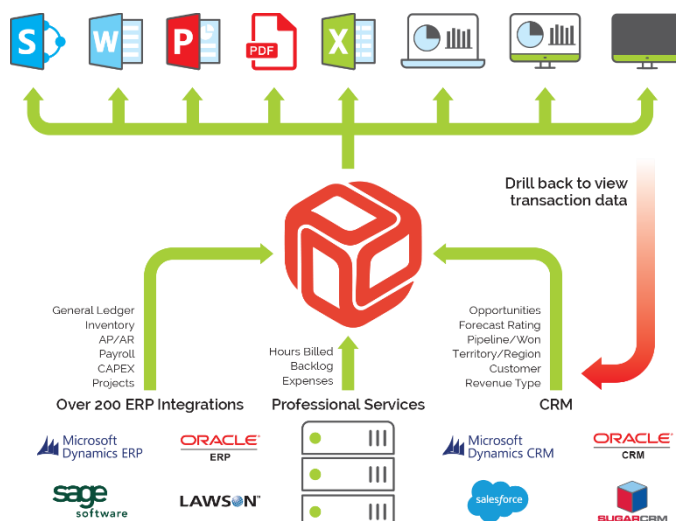
CRM data is a gold mine for forecasting, but companies struggle today to connect their huge CRM data sets back to their financial forecast due to the complexities of the variables involved. In our single simple solution, we unite the critical source data, forecasting processes, and analysis within the Prophix CPM platform. Consequently, CFOs, VP Sales, and VP Services work to optimize revenue and resource planning cycles by:

- > Collaborating on analysis and "what if" scenarios
- > Getting instant forecasts based on real-time CRM and Services data
- > Having shared perspective on corporate objectives like growing revenue profitably

Value to the Business Process

A Complex, Intricate, Often Disjointed Business Process is Simplified yet Adaptable

- > Incorporates ERP, CRM, and Services data together into a comprehensive, integrated financial plan
- > Jump started through a prescribed data model and calculations, yet flexible to meet your unique needs
- > Simple, easy-to-use, and intuitive forecasting process for each user's role
- > Automating the revenue and resource plan is possible and executed as you demand



Solution Benefits Quota when deriving resource plans.

- Integrate business plans to align and optimize resources and drive revenue
- Create rolling forecasts for variance analysis
- Enhance sales and revenue reporting and analytics
- Achieve corporate objectives and revenue goals by monitoring and tracking performance using dashboards and comprehensive reports
- Plan and manage resources and compensation based on revenue goals and opportunities

CFO - Credible, driver-based financial forecasts available on demand through the collaboration between Sales and Services.



CFO Dashboard

VP Sales - Don't have to fumble with spreadsheets and 1000s of lines-of-data to deliver their numbers to CFO. Each sales rep's CRM inputs truly matter in determining meaningful forecasts of revenue and resources.



Bookings Dashboard

VP Services - Gains insight into backlog contribution from CRM and Quota when deriving resource plans.



Services KPI Dashboard

Contact Us

AS A NORTH AMERICAN LEADER IN STRATEGY AND DIGITAL TECHNOLOGY, Alithya designs and builds innovative and efficient digital solutions for business challenges. Our clients cover a large spectrum of sectors including Banking, Investment and Insurance, Energy, Manufacturing, Retail and Distribution, Telecommunications, Transportation, Professional services, Healthcare and Government. Our 2,000 professionals in Canada, the US, and Europe combine pragmatic understanding and creative thinking to structure and streamline intricate operational ecosystems, help transform their businesses, and drive their growth every single day.

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