

Highly Tuned Sales Plan Drives Winshuttle's Top-Line Growth

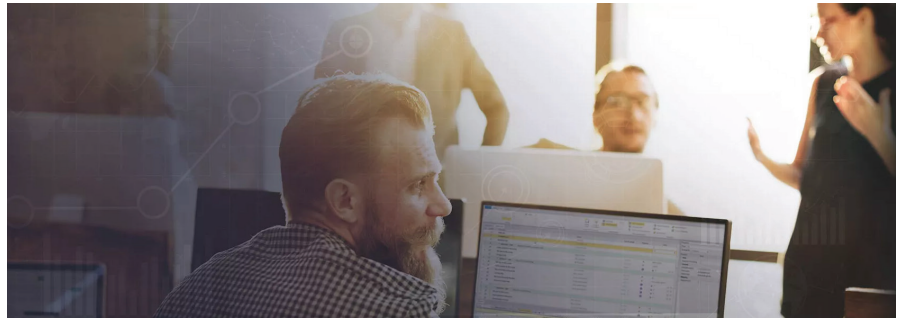
WINSHUTTLE

Winshuttle
Software
Bothell, WA

Founded in 2003, Winshuttle provides enterprise customers around the globe automated solutions for data management, workflow applications, and data governance.

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— Jeff Bergstrom, CFO



Software company automates sales planning to improve performance across the organization

Enterprises rely on Winshuttle's software to automate and simplify the collection, validation, and movement of data in SAP and other large enterprise resource planning systems. So it was particularly frustrating for Winshuttle CFO Jeff Bergstrom when his company was struggling to streamline some of its own key processes.

"As a high-growth software company, our business model is highly dependent on top-line sales projections, because the rest of our financial model flows from there," Bergstrom said. "If we don't have our sales plan finely tuned, it's very difficult for me to give accurate and real-time projections about how the company is performing."

At issue was Winshuttle's reliance on single-user spreadsheets. Sales planning was being conducted primarily in Excel, resulting in a slow and inefficient process of "spreadsheet trading" as the various pieces of the sales and financial models remained disconnected from one another.

A dynamic business outgrew static modeling tools

For an organization like Winshuttle, Excel was no longer cutting it. For example, since Winshuttle had to constantly update multiple Excel spreadsheets in multiple workbooks representing its global offices and various markets, it could take days to come up with just a single model. Every time new sales projections came in, the process would start anew, leaving no time to explore multiple scenarios for growth projections. This made it difficult to know when and where the company needed to hire staff and make other investments to meet the demand.

We've been able to apply some of the discipline we learned on the finance side of the house to help sales get a much more detailed planning process in place. Just as it did on the finance side, it's made modeling for our sales organization less art and more science.

— Jeff Bergstrom, CFO

Integrated Data Accelerates Business Planning and Consolidated Financial Close

With quotas changing, territories being split and rebalanced, and capacity getting deployed and redeployed, the company knew it needed a highly tuned sales process capable of continuously optimizing. That's where Adaptive Insights enters the picture.

With Adaptive Insights for Sales, Winshuttle now has the ability to easily create a bottom-up model for meeting top-line booking targets. In addition, the company can finally connect its model to its Salesforce data to automatically bring in opportunity and account level information by rep.

Today, the sales team can easily view historical and seasonal trends to project sales going forward while analyzing staffing, productivity, ramp, quota coverage, and attainment across multiple regions. All this easily accessible data makes it simple to look at multiple scenarios for growth projections, compare multiple plans, conduct what-if analyses in real time, and make adjustments to its sales strategy and forecast on a rolling basis.

"I'm able to have my operations teams in EMEA and North America update their sales forecasts, and I can see the results to the overall plan in real time," said Scott Spilker, manager of business and sales operations at Winshuttle. "Dashboards enable us to run capacity and head-count scenarios on the fly and see the impacts of those changes immediately. It opened our eyes to things that we may not have known before and gave us the ability to further explore and model out changes in data points we may not have expected."

Sales as the next step in the active planning journey

As a longtime user of the Adaptive Suite—specifically, Adaptive Planning and Adaptive Consolidation—for financial forecasting, budgeting, and intercompany consolidations, Winshuttle gained incredible value by being able to bring the sales plan onto the same platform as the core financial model, creating a much tighter integration between these two critical functions.

"Linking the sales plan into the financial model has enabled us to run holistic scenarios in real time and given us a common language across the organization to speak about how we're performing both financially and operationally," Bergstrom said. "Now we have executives speaking one language, one set of metrics, one source of truth. Therefore, our plans are much more integrated and tightly aligned between the various functions than they've ever been able to be before."

Corporate Headquarters

3350 W. Bayshore Road, Suite 200
Palo Alto, CA 94303

T: +1 800 303 6346
F: +1 650 528 7501

Australia Headquarters

Level 24, Three International Towers
300 Barangaroo Ave. Sydney, NSW 2000

T: +61 2 8067 8520

UK / Ireland Headquarters

88 Wood Street London,
EC2V 7RS, UK

T: +44 0 208 528 1767

adaptiveinsights.com

adaptiveinsights.co.uk

info@adaptiveinsights.com

sales@adaptiveinsights.com

press@adaptiveinsights.com

support@adaptiveinsights.com