Establishing Sales Targets: User Stories

User Story 1.1

As a Regional Sales Executive, I need to use the FY20 monthly forecasted revenue by country and product family from the FP&A model to create a Baseline Financial Forecast in the Sales Planning model. The Baseline Financial Forecast from the Finance business unit will be a starting point for establishing the Initial Sales Targets.

I'll know this is complete when I can review the quarterly Baseline Financial Forecast sales revenue data for each country by product family, for the current year (FY20).

User Story 1.2

As a Regional Sales Executive, I need to be able to add an annual percentage increase "stretch goal" to the Baseline Financial Forecast to establish the Initial Country Sales Target for each country that I manage.

The percentage increase in each country's revenue projections should be reflected across all product families and quarters of the fiscal year. For each country that I supervise, I want to be able to see the Baseline Financial Forecast values, calculated Initial Country Sales Targets, and the difference between the two values for each product family and the total of all products.

I'll know this is complete when I can input an annual percentage increase for a country and see the Initial Country Sales Target that results and the difference between the Baseline Financial Forecast and the Initial Country Sales Target.

User Story 1.3

As a Regional Sales Executive, for each account I need to see the previous year's (FY19) actual quarterly revenue by product. I need this data to identify the product sales patterns for each account. For any of my country's accounts, I will review the actual sales to determine how well each product sold for in each quarter of the previous year.

I also need to bring each account's previous year's actual quarterly sales revenue to the current year (FY20). I will use the data to calculate each account's quarterly sales goals for the current year (FY20) in proportion to the previous year's product sales revenue.

I'll know this is achieved when I can view the previous year's (FY19) actual quarterly sales revenue for each product sold by an account. I will also be able to see the previous year's actual revenue data moved forward to the current year (FY20); this will be used as the basis for allocating current year (FY20) sales targets set at the country and product family level. I should also be able to see the quarterly total for each account.

User Story 1.4

As a Regional Sales Executive, I need to determine the ratio of each account's previous year actual product sales revenue to the country's previous years actual sales revenue by product family.

This calculation will be used to establish the quarterly Initial Account Sales Targets while maintaining the product seasonality and sales patterns for each account.

I will know this is complete when I can see the percentage of the country's actual sales revenue by product family that each account's actual product sales contributed to per quarter.

User Story 1.5

As a Regional Sales Executive, I need to calculate the Initial Account Sales Targets for each quarter of the current year.

The quarterly Initial Account Sales Targets are determined by distributing the Initial Country Sales Target proportionally based on the ratio of each account's previous year actual sales revenue by product to the country's previous year actual sales revenue by product family.

I need to see the Initial Account Sales Targets by quarter and the whole year.

I'll know this is complete when I can see the quarterly Initial Account Sales Targets for each product sold at each account as well as each accounts total Initial Account Sales Target for the year.

User Story 1.6

As a Regional Sales Executive, I need to see how a country's Final Account Sales Targets for the year are distributed across the different account size segments (Small, Medium, Large).

Small, medium, and large accounts require different sales support, so I need to make sure that I have visibility into the proportion of each segment in a country. This will help me anticipate any areas that require a change in sales support.

I will know this is complete when I can see the Final Account Sales Targets aggregated for each country's small, medium and large segments.

User Story 1.7

As a Regional Sales Executive, during my review of accounts, I need the ability to manually enter a different value to override an individual account's total Initial Account Sales Target for the year. The total Initial Country Sales Target should remain unchanged when I do this.

I also need to see how these overrides affect our distribution across account size segments since small, medium, and large accounts require different sales support. After entering overrides, the results will be the Final Accounts Sales Targets for the current year (FY20).

I will know this is complete when I can override an account's Initial Account Sales Target and see the Final Account Sales Targets for all accounts in the country, along with how this will affect my account size segment distribution.

User Story 1.8

As a Regional Sales Executive, after I override an Initial Account Sales Target, I need the difference between that Initial Account Sales Target and Final Account Sales Target to be redistributed across other accounts that are in that country.

We do this because we do not want to increase or decrease the Initial Country Sales Target. Rather, we want that difference spread across the other accounts that are in that country.

I'll know this is achieved when I can increase or decrease an Initial Account Sales Target with an override and see that difference distributed across other Final Account Sales Targets within the country.

User Story 1.9

As a Regional Sales Executive, I need to be able to select individual accounts that I want to maintain the Initial Account Sales Target value and exclude it from the redistribution of the Initial Country Sales Target across accounts when another account's Initial Account Sales Target is overridden.

The selected account's Initial Account Sales Target should be maintained as the Final Account Sales Target when other account's Initial Account Sales Targets within the country are overridden.

I will know this is complete when I can hold one or more accounts' Initial Account Sales Target value and exclude the account from any redistribution of the Initial Country Sales Target across the country's accounts when one or more accounts' Initial Account Sales Target is overridden with a manually entered value.

User Story 1.10

As a Regional Sales Executive, I need to see the adjusted Account Sales Targets for each account after the proportional redistribution of the portion of the Initial Country Sales Target across all accounts that are not held or manually overridden.

I will know this is done correctly when the Final Account Sales Targets for any accounts that have not been held or overridden have been proportionally updated to maintain the total Country Sales Target.

User Story 1.11

As a Regional Sales Executive, after performing the Account Review, I want to view the quarterly distribution of each account's annual Final Account Sales Target. The annual Final Account Sales Target for each account should be distributed across quarters to reflect the seasonality and proportionality of the Initial Account Sales Targets.

I will know this is complete when I can see each account's Final Account Sales Target by quarter.

User Story 1.12

As a Regional Sales Executive performing an Account Review, I need to be able to filter by country and by segment.

When we perform our Account reviews, we need to make sure to balance the country by segments. Because of this, I need the ability to filter by country and by segment. Because this exercise is performed by multiple regions at the same time. I need every Regional Sales Executive to have their own filters set up.

I will know this is complete when I can filter by both country and/or segment and only see accounts that belong to that country or segment. If another user is also using this dashboard, I will see my filtering criteria and not theirs.

User Story 1.13

As a Regional Sales Executive, I need to be able to clear all account holds, account overrides, and manual or redistribution Account Sale Target changes that I made during the Account Review process.

I need the ability to clear the holds and overrides checkboxes along with any Override Sales Targets to get a clean slate and perform the Account Review again with no selected holds, overrides, or changes to the Initial Account Sales Targets.

I will know this is successful when I can clear all holds and overrides by clicking a reset option on a dashboard. The Initial Account Sales Targets will be unaffected when I do this.