



Plan smarter together

# Accelerating territory & quota planning rollouts

When Dassault Systèmes, a global leader in digital manufacturing solutions, needed to modernize their territory and quota planning processes, they partnered with Keyrus and Anaplan for streamlined sales planning transformation.

→ **Executive summary:** a strategic collaboration that revolutionized sales planning for a global innovation leader

Dassault Systèmes, a **catalyst for human progress** providing collaborative virtual environments for sustainable innovations, serves more than 350,000 customers across 12 industries in 150 countries with \$6 billion in annual revenue. The company's portfolio includes flagship brands like SolidWorks, CATIA, SIMULIA, and DELMIA, with **all Fortune 500 companies running some portfolio of their products**.

**Led by Dan Barnes**, who oversaw planning and operations for North America's largest sales organization supporting 250 sales representatives across a \$1.5 billion revenue operation, the company **faced critical challenges** with their Excel-based territory and quota planning processes. The organization's matrix structure included both industry sales teams focused on vertical markets and brand sales teams focused on product portfolios, creating complex allocation requirements.

The ultimate objective was to transition from fragmented, spreadsheet-dependent planning to a **unified, data-driven territory and quota management system**. Working with Keyrus expert consultants, Dassault Systèmes chose Anaplan to implement a comprehensive territory and quota planning system that could handle their operational complexity while providing real-time visibility and streamlined processes.

The Keyrus-led implementation delivered transformative results: **six-week acceleration in quota plan releases**, \$1+ million savings in avoided commission overpayments, and 850+ manual hours saved across operations and sales management teams. This collaboration demonstrates how **strategic technology implementation can revolutionize sales planning** for complex global manufacturing organizations.



## → **The challenge:** overcoming sales planning complexity at enterprise scale

Dassault Systèmes' North America operations faced multiple territory and quota planning hurdles that were hindering their ability to execute effective sales strategies across their global manufacturing customer base. Dan Barnes, Strategy and Transformation Leader at Dassault Systèmes, highlighted:



### *Excel-based process limitations*

“We were doing everything in Excel... all of our territory planning all of our quota allocation... it got too large to be able to manage in Excel we were missing timelines... we were inefficient.”

### *Intensive manual data integration*

“We had no tool that really gathered a lot of the historical information within our territory. [...] We would manually be pulling all that information together in Excel. Often times the reports would be incomplete, or from data sources that were disparate coming from different places.”





## → **The challenge:** overcoming sales planning complexity at enterprise scale



### *Managers planning in silos*

“They had their own methods of determining quotas... it was really a problem because at the end of the day... it resulted in misaligned resources.”

### *Timeline management failures*

“Typically, we have our sales kickoffs probably in the middle of January. Our goal is to have quotas out by end of February... and we weren't very good at getting quotas out. We weren't done with quota distribution and finalization, until sometimes close to the end of April, which was completely unacceptable.”

### *Limited sales pipeline visibility*

“Without real time access to the information, we did a process in December in order to get quotas out by January, so we used some ad-hoc numbers for the end of the year.”



## → **The solution:** Anaplan territory and quota planning with Keyrus

Dassault Systèmes selected Anaplan as their platform of choice, working with Keyrus to lead the comprehensive territory and quota planning transformation. The decision was driven by Gartner research and the platform's ability to address their complex matrix organization requirements while providing real-time visibility and integration capabilities.



### **Platform selection rationale**

- ✓ Comprehensive territory and quota planning capabilities
- ✓ Real-time data federation from multiple sources
- ✓ Matrix organization support for industry and brand teams
- ✓ Integration capabilities with existing business systems



### **Implementation Partnership**

Keyrus was selected based on their extensive Anaplan experience, including previous successful implementations within Dassault Systèmes' subsidiary organizations.



“We chose Keyrus as our integrator. They have a lot of experience with Anaplan; in fact, even within our company, there was a subsidiary that had already used Keyrus previously, so we relied on that expertise.”

*Dan Barnes, Strategy & Transformation Leader*

## → **The implementation:** comprehensive territory & quota transformation

The implementation team, composed of Dassault Systèmes subject matter experts and Keyrus consultants, delivered a comprehensive Anaplan-based solution that addressed the company's complex sales planning requirements:



### **Data aggregation & federation**

- ✓ **Multi-source integration:** successfully aggregated 10 different data sets in one centralized location
- ✓ **Real-time updates:** Enabled territory updates and employee changes to be reflected immediately
- ✓ **Enhanced visibility:** Provided comprehensive territory coverage reports across both industry and brand teams for the first time



### **Advanced workflow management**

- ✓ **Top-down account planning:** Implemented sophisticated account-level quota allocation with integrated industry and brand manager coordination
- ✓ **Bottom-up territory allocation:** Enabled detailed territory planning with full visibility for all managers across the sales organization
- ✓ **Cross-functional integration:** Created intersection capabilities between managers at the account level



### **System integration excellence**

- ✓ **ETL output generation:** Built system-generated outputs from Anaplan for seamless distribution
- ✓ **Controlled integration timing:** Enabled flexible scheduling of updates to downstream systems at desired intervals

## → **The results:** transformative outcomes driving measurable business value

The collaboration between Dassault Systèmes and Keyrus delivered significant measurable benefits that transformed their sales planning capabilities:

**6w**  
quota plan  
acceleration

### **Accelerated planning execution**



**Six-week quota plan acceleration**, achieving quota distribution by the end of February, “for the first time in the company’s history” for North America’s largest sales organization.

**\$1M+**  
savings in  
commissions

### **Financial impact achievement**



**\$1+ million savings** in avoided commission overpayments through balanced quota assignment and improved territory allocation visibility across industry and brand teams.

**850+**  
manual hours  
saved

### **Operational efficiency gains**



**850+ manual hours saved** across operations and sales management teams, eliminating intensive manual data preparation and simulation processes.



## → **The results:** transformative outcomes driving measurable business value



**Improved territory allocation**  
with visibility enabling optimal sales resource deployment and account deduplication



**Enhanced sales team morale**  
through data-driven quota assignments that salespeople could understand and support



**Balanced quota assignment**  
with cross-functional visibility preventing misallocation across the matrix organization



**Real-time planning capabilities**  
replacing annual simulation exercises with dynamic, responsive planning processes



“Salespeople felt like they finally got quotas that made sense, based on data driven results and analysis that we could back up with real data, and not just a gut feel. I think people in general felt really good about the T&Q process this year.”

*Dan Barnes, Strategy & Transformation Leader*



## → **Looking forward:** expanding the sales planning ecosystem

- **Sales capacity planning integration:** Extending beyond territory and quota to include comprehensive sales capacity planning that integrates HR data with territory allocation.
- **AI account segmentation:** Implementing Anaplan's advanced account segmentation tools to provide intelligent account targeting recommendations to optimize sales focus within allocated territories.
- **Sales & operations planning:** Connecting business planning modules with territory and quota planning to create visibility.



“Having that in a federated place under a common system where data has integrity, and it's real time... is something that we want to continue to benefit from, because we're certainly benefiting from the ROI there.”

*Dan Barnes, Strategy & Transformation Leader*

## → The details.

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**Sales Performance  
Management**  
*Use case*



## → About

Dassault Systèmes is a catalyst for human progress, providing business and people with collaborative virtual environments to imagine sustainable innovations. The company serves more than 350k customers across 12 industries in 150 countries, generating \$6 billion in annual revenue. Their portfolio includes flagship brands like SolidWorks, CATIA, SIMULIA, and DELMIA, with all Fortune 500 companies running some portfolio of their products.

## → About

At Keyrus, we transform your performance goals into actionable results. Anaplan Partner with 10+ years in Partnership, expertise in deploying international projects with more than 350 EPM implementations. Our expertise combines organizational best practices, and user-centric approaches to ensure seamless integration from data management to planning and analytics.

T&Q Planning

Sales Performance Management

FP&A

HR

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