



APPTIO ENERGIZES ITS SALES TEAM AND IMPROVES FINANCIAL ACCURACY WITH XACTLY SALES FORECASTING

QUICK UPFRONT:

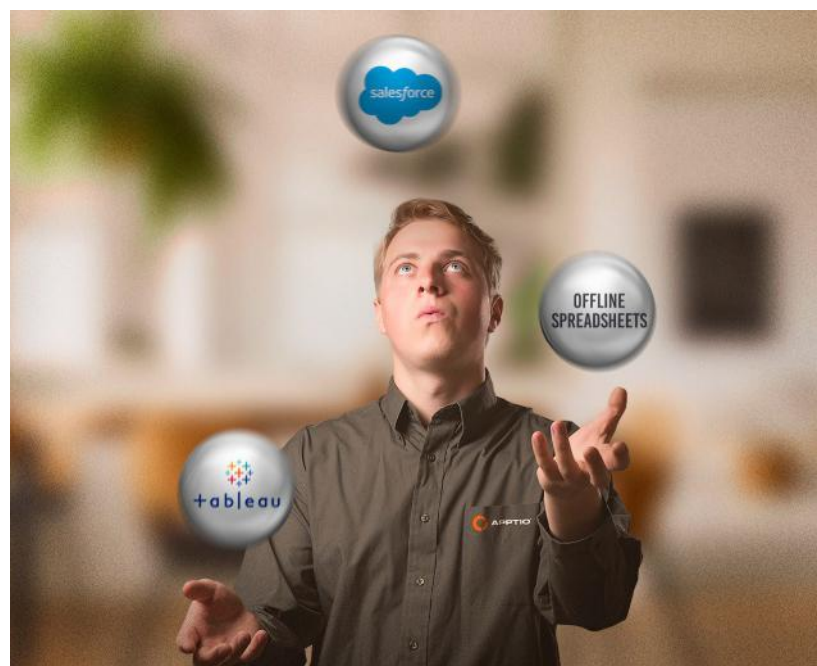
Xactly sat down with Apptio's Robert Reid, Vice President of Global Sales Strategy and Operations, and Indu Thomas, Head of Enterprise Data Strategy and Analytics, to discuss their first month with Xactly Forecasting.

Here's how Apptio **quickly improved financial accuracy and sales performance with Xactly.**



SALES FORECASTING AT APPTIO BEFORE XACTLY

Live entertainment is a thrill for the viewer: watching performers **juggling or plate spinning, acrobats flying through the air, and entertainers accomplishing gravity-defying stunts.** Every act has the audience holding their breath in anticipation of whether it'll all come crashing down. These acts are the last thing any companies want their workers to experience when meeting organizational goals, **especially in a turbulent economy.**



Next-generation leaders are getting things done quickly by making things easier. They are focusing on new ways to create impact. They want efficiency because they realize that you have to do more with less - this is our new reality. **Fires that burn in sales affect morale. Having the right data can actually shift the role of a sales leader from taskmaster to coach.**

Apptio is making things simpler for their sales reps, helping improve day-to-day interactions and building confidence company-wide.



By simplifying work processes, we can reduce the time the rep spends on mundane tasks and coach them to have a higher degree of confidence in closing deals. **We replace excuses with data** and close gaps so reps have greater accuracy in hitting their numbers.



INDU THOMAS HEAD OF ENTERPRISE DATA STRATEGY AND ANALYTICS

When it came to reporting on deals and projecting future sales numbers for executive leadership, **Apptio's sales representatives found themselves juggling multiple data reporting systems between Tableau, Salesforce, and offline spreadsheets.** The software refreshed at infrequent intervals, making it difficult to capture real-time data. The sales teams manually compared and contrasted these outdated numbers with Excel spreadsheets, causing frustration, wasted time, and more churn.



In addition, executive leadership had one single view into the data and was unable to collaborate with the sales team – proving Apptio's choice to leverage Xactly's forecasting solution to quickly simplify the process before all the balls came crashing down was spot-on.

WHY XACTLY SALES FORECASTING?



It's more than just the metrics. It's about **streamlining and collating** activities. By limiting the time people spend juggling information, we can provide the centralized data our C-suite needs in real-time. 🙌

ROBERT REID

VICE PRESIDENT OF GLOBAL SALES STRATEGY AND OPERATIONS

Xactly Forecasting provides a **simplified, streamlined process that gives much-needed visibility and transparency in an organization**, leading to a higher degree of trust across all levels.

HOW XACTLY FORECASTING HELPED



STOPPED THE JUGGLING

Xactly Forecasting enabled Apptio's leadership team and its sales representatives to collaborate from the same starting point. This gave the **CEO, CRO and CFO one "single pane of glass" to look at all sales activity**, including forecasted details, while enabling the development of rep-level templates for a simple plug-and-play reporting process.

The ability to gather insights and validation from data in real-time excited Apptio's executive leadership team, bolstering their ability to back up or refute anecdotal feedback with dependable data and effectively pivot business accordingly.

CONSOLIDATED DATA INTO A SINGULAR BALL TO THROW

By using one system instead of several separate tools, Apptio's sales teams now **spend more time focusing on reaching goals utilizing their data versus chasing down and computing the numbers.** Simplified and streamlined data made their lives easier, and increased the adoption of a new process, leaving the team empowered to be more strategic.

DEVELOPED SIMPLE CATCH AND THROW GAME

With increased confidence and reliance on source data without reconciliation, sales representatives know exactly what metrics the leadership team is assessing, and how to reach these goals.

Leaders today want the data they need immediately so that they can act. **With a “No More Excuses” approach, Apptio’s leadership team can “throw” goals to the sales reps, and the sales reps can “catch” them** by leveraging the streamlined data and developing the right strategy to meet clients’ needs. By simplifying processes and improving daily interactions, Apptio is energizing its sales team and on target to meet its goals.

APPTIO’S BENEFITS USING XACTLY INCENT:

- ✓ **Greater visibility** for reps into commissions
- ✓ **Faster processing time and more accurate payouts** create positive reinforcement for reps
- ✓ Enhanced ability to **quickly make plan changes** so that sales reps can proactively manage disruptions
- ✓ Increased visibility for managers into the results of their direct reports. This allows for **managers to focus on areas of improvement for reps**, so they can quickly raise any concerns or issues with performance
- ✓ Seamless integration of **Xactly Forecasting and Xactly Incent** enable reps and managers to track against quota attainment from a pure bookings perspective

WHAT’S NEXT FOR APPTIO AND XACTLY:

Apptio is turning its focus onto the next evolution: **successfully leveraging pipeline management of Forecasting** to enable its sales representatives to look beyond in-quarter data to see larger views of out-quarter data as well.