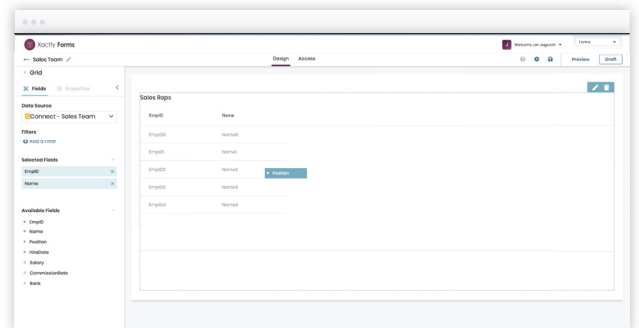# Xactly **Forms**

Xactly Forms extends the Xactly Sales Performance Management (SPM) platform with interactive forms and logic to drive collaboration and data input across business processes.

FORM DESIGNER

Leveraging the drag-and-drop Form Designer, business process owners can quickly and intuitively build forms based on any data set in the Xactly SPM platform and publish the forms to the contributors of the business processes.

FORM VIEWER

Utilizing the Form Viewer, end users can contribute to business processes in a secure and controlled manner by interacting with forms designed to support their specific role in a business process.

PLATFORM INTEGRATION

With its native integration with Xactly Connect, data managed through Xactly Forms is immediately available across the entire Xactly SPM platform.
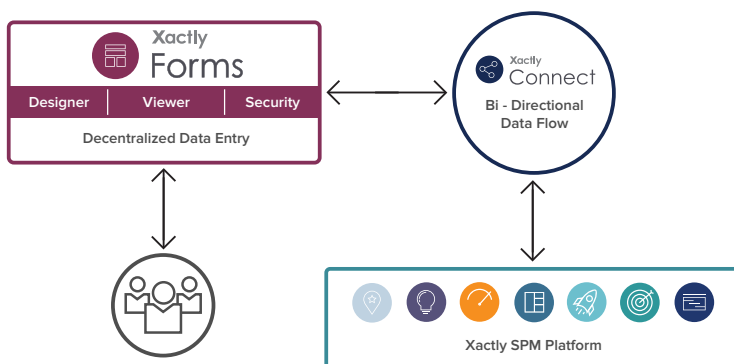
COMMON USE CASES

1. Deal claim forms to allow sales reps and sales manager to request compensation credit for the deals they contributed to.

2. Quota handoff forms to allow the sales operations team to provide the compensation team with approved quotas in a collaborative manner.

3. Bonus allocation forms to allow sales managers to assign bonuses to team members on a discretionary basis.

WORLD CLASS SALES PERFORMANCE MANAGEMENT

14+ Years of Pay and Performance Data

PLANNING
Market Coverage
Sales Capacity
Territory Alignment
Quota Allocation

EXECUTION
Compensation Management
Commission Expense Accounting

OPTIMIZATION
Sales Analytics
Quota Attainment
Objectives Management

SALES PERFORMANCE AI PLATFORM

Xactly **Connect**   Xactly **Forms**

CRM   CPQ   ERP   HCM

All of This is Backed by Xactly's Superior Service and Support

PLANNING
Streamline and simplify sales planning processes, including territory, quota and workforce planning, incentive compensation design, and accrual forecasting

- **Increase productivity** – by lowering the time spent on territory planning and gaining selling time with compact and travel efficient territories
- **Build trust** – with error free compensation payouts and data-driven territory design
- **Increase forecasting accuracy** – by easily running commission forecasts as deals change

EXECUTION
Achieve higher growth with a motivated and engaged sales force and ensure critical processes are executed faster and more accurately with ICM and commission expense accounting

- **Provide accurate financial forecasts** – with a more precise picture of your company's commissions data
- **Maximize the ROI of your SPM solutions** – with standards-based data integration capabilities that fit within your existing infrastructure
- **Automate key business workflows** – to increase efficiencies, improve alignment and eliminate errors

OPTIMIZATION
Harness the value of AI and ML to optimize the performance of your sales organization with access to 14+ years of aggregated pay and performance data and provide a recommended course of action

- **Drive sales productivity** – with a comprehensive view into the health and performance of your sales team in order to make needed adjustments
- **Quickly spot risk factors** – predict sales rep attrition, clusters of under-performance, and changes in sales indicators
- **Make coaching more effective** – with individual performance insights, such as year-over-year quota attainment comparisons and access to staked rankings comparisons