

## STRATEGIC CHECKLIST

*How effective is your sales and employee performance management?*

yes no

- |                          |                          |  |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Do you use empirical data to match incentives to market conditions?                |
| <input type="checkbox"/> | <input type="checkbox"/> | Are your incentives aligned with your company goals?                               |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you test your plans before you implement them?                                  |
| <input type="checkbox"/> | <input type="checkbox"/> | Do your sales reps have real-time visibility into their performance?               |
| <input type="checkbox"/> | <input type="checkbox"/> | Are your executives connected to real-time sales and employee performance metrics? |
| <input type="checkbox"/> | <input type="checkbox"/> | Are your sales reps performing above industry norms?                               |
| <input type="checkbox"/> | <input type="checkbox"/> | Are you retaining your best sales reps?  |

## TACTICAL CHECKLIST

*How efficient is your sales and employee performance management?*

yes no

- |                          |                          |  |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Do you have an excessive number of commission disputes?                            |
| <input type="checkbox"/> | <input type="checkbox"/> | Is your current incentive system fully secure?                                     |
| <input type="checkbox"/> | <input type="checkbox"/> | Are your accrual and cash flow forecasts accurate to within 1 percent?             |
| <input type="checkbox"/> | <input type="checkbox"/> | Does your current incentive system seamlessly operate with CRM and ERP?            |
| <input type="checkbox"/> | <input type="checkbox"/> | Can you make incentive plan changes in real-time?                                  |
| <input type="checkbox"/> | <input type="checkbox"/> | Are you incentive plans designed around business needs not technology limitations? |
| <input type="checkbox"/> | <input type="checkbox"/> | Is your current system fully auditable?  |

If you answered "yes" to more than four of these, then SPM is right for you. Accordingly, keep these additional items in mind:

- Think holistically about your incentive compensation; planning / design, calculation / accuracy, analytics / reporting, and internal control / risk management.
- Design process change in your organization to ensure success.
- Think beyond the product, pay attention to the 4S's: Support, Service, Security, and Scalability

See why companies like Marketo, Rosetta Stone, and Sandisk are choosing Xactly for managing Sales Performance.