THE SALES LEADER'S GUIDE TO XACTLY INSIGHTS FOR SALES:

6 Effective Ways to Use Insights for Sales to Boost Operational Success

eBook

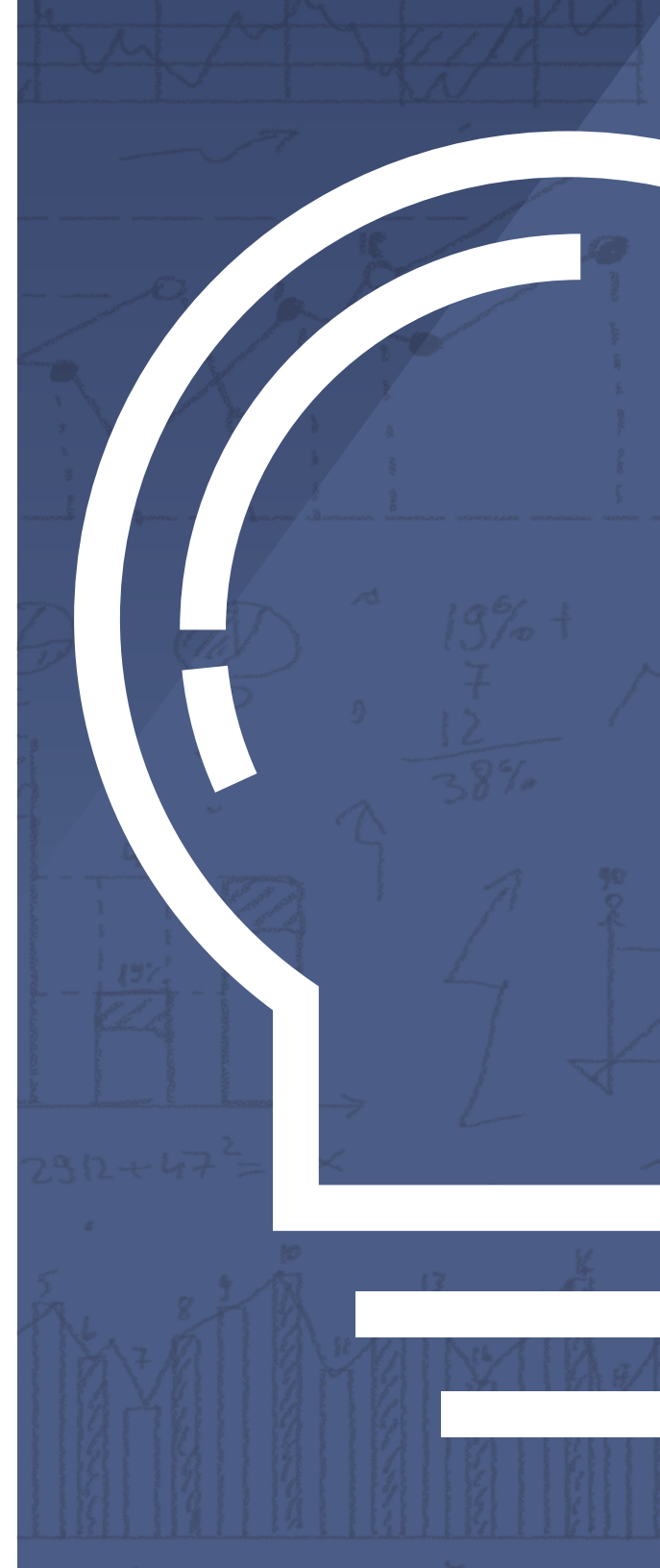## WHAT IS XACTLY INSIGHTS FOR SALES?

As a Sales leader, you need accurate information at your fingertips, but you likely don't have the time to pore through mountains of data. Your existing dashboards and reports are too technical, too limited in scope, or force you to rely on colleagues in other departments to disseminate reports across the business. Xactly Insights™ for Sales addresses this information bottleneck head on, providing Sales leaders with the data they need, when they need it.

With Insights for Sales, you gain access to sales analytics with actionable recommendations based on your own historical data as well as pay and performance results from best-in-class companies. Insights for Sales integrates Xactly's proprietary cross-industry and cross-company dataset into a next generation dashboard, empowering Sales leaders with a comprehensive view into their organization's performance.

Ultimately, Insights for Sales was built to provide Sales and Operations leaders with the following:

- Actionable recommendations to improve problem areas, reduce turnover, and hit quota
- At-a-glance team and rep performance
- Easily-identifiable areas of risk or opportunity in your sales org
- Benchmarking based on pay and performance data from best-in-class companies
- Out-of-the-box reporting
- Analytics that predict missed quota attainment, turnover risk, and more

But the benefits don't stop there. Let's take a deeper look at how Insights for Sales empowers Sales leadership and Sales Ops to make decisions that boost overall rep performance.

BY USING XACTLY INSIGHTS FOR SALES, YOU CAN:

Quickly Understand and Analyze Sales Org Performance

Most standalone analytics or BI tools and dashboards do a great job at one or two things, but they fail to paint a complete picture or suffer from a clunky interface. As the revenue engine of the organization, it's critical that sales leaders are able to access a cohesive view of team performance.

Insights for Sales wraps sales analytics and reports, industry benchmarks, stacked rankings, and historical analyses into one centralized location, giving leaders answers at their fingertips. This means you'll spend less time being overwhelmed by data and more time leveraging the information in front of you.

Rely on Notifications to Identify Anomalies, Outliers, and Opportunities Across Your Business

With so much data available through CRMs, ICMs, and other sales systems, the challenge often lies in figuring out how to react. Data can lead to answers, but oftentimes sales leaders find themselves spending valuable time answering the wrong questions. Leaders need tools that will help them identify anomalies, outliers, or areas of concern and opportunity that would have otherwise gone unnoticed.

To this end, Insights for Sales will notify you of:

- No recent sales credits
- Pay/Performance discrepancies
- High and low turnover
- High/low performance

With this information, you can focus your efforts on analyzing the right data, rather than building the wrong reports.

Reduce Attrition by Ensuring Competitive Pay and Performance

Attracting talented sales reps is only half the battle; once they're a member of your team, it's critical that comp plans and payouts are motivating. Benchmarks and AI can identify patterns that reduce rep turnover, allowing you to zero in on and avoid the trends that cause costly churn. These same tools can help you optimize opportunity cost related to commissions payouts, ensuring you pay neither too much nor too little for performance.

Take Charge of the Conversation with a Common Core of Data

Inter-departmental meetings are often encumbered by siloed communications in which different departments rely on distinct sets of data and reports. Meetings that involve multiple teams or Centers of Excellence (COEs) working from their own datasets result in unfocused attention, which can lead to conflicting objectives. Insights for Sales changes the conversation by aligning the priorities of isolated teams around a common core of standardized, out-of-the-box sales reports.

6 XACTLY INSIGHTS FOR SALES USE-CASES

1. Get Answers Fast with Pre-built Reports

The Challenge
Sales leaders are often forced to idly wait on colleagues in other departments for critical sales reports. Sales Operations leaders frequently find themselves being dragged away from pressing tasks in order to build routine reports for their sales counterparts.

The Solution
Xactly Insights for Sales provides a comprehensive and dynamic view of your sales organization right out-of-the-box. Sales has the information they need, when they need it, and Sales Operations recovers valuable time that can be refocused on high-value activities.

Your Competitive Advantage
Virtually every business today leverages some type of modern reporting, but what some offer in depth, they lack in breadth, and what others offer in simplicity, they lack in substance. Insights for Sales aggregates several types of critical sales data in a single, intuitive UI so that your sales org is always on top of its game.

2. Identify Areas of Growth and Vulnerability

The Challenge
Even the most data-savvy sales leaders can find themselves spending valuable time asking the wrong questions and building out the wrong reports. Not only is this a waste of time, but these leaders aren't homing in on the areas of the business in greatest need of their attention. This means missed opportunities for mitigating financial risk and increasing the odds of profitable growth.

The Solution
Leveraging your own historical data as well as pay and performance results from best-in-class companies, Insights for Sales delivers sales analytics with actionable recommendations for how to optimize growth and minimize financial risks.

Your Competitive Advantage
For most businesses, the greatest challenge isn't finding data, but rather figuring out what to do with that information. This can lead to time wasted and opportunities missed. Insights for Sales directs your attention to the most pressing areas of your business so that you stay ahead of the curve.

"Xactly Insights gives us immediate access to the information we need, when we need it, so we can be sure sales performance aligns with our corporate goals."

DocuSign

"Xactly Insights for Sales will give the sales management team flags for overachievement, underachievement, super recognition, or for doing a great job. Having access to that information would be amazing, and save a lot of time."

proofpoint

3. Be Nimble and Make Data-Driven Decisions

The Challenge

With the incredible amount of data at our disposal, it's difficult to take action and be decisive.

The Solution

Insights for Sales cuts through the noise to identify the most pressing areas in your sales organization, so that you can act quickly and confidently. You aren't saying it, the data is.

Your Competitive Advantage

With so much information and no good option for combing through it, many organizations are slow-moving, indecisive, and hesitant to lean on data because they're not sure where to begin. The landscape changes at lightning speed and you need to be able to keep pace and maintain your eyes on the horizon to stay competitive.

4. Recruit & Retain

The Challenge

Hiring good sales people is hard, and keeping them is an even greater challenge. If your reps believe they can do better at another organization, there's not a lot to stop them from doing so. But organizations are typically close-lipped when it comes to their compensation practices. It can be a challenge to figure out how you stack up against the competition.

The Solution

Xactly Insights for Sales delivers sales analytics with actionable recommendations based on your own historical data as well as real pay and performance results from best-in-class companies. Discover how you stack up against your own organization and the competition. Measure team and individual attainment against quotas and incentives, analyze turnover rates, or examine the importance of tenure.

Your Competitive Advantage

You're able to rely on empirical pay and performance data when persuading a rep to join your organization or convincing a top-performer to stay. You have the data to prove it; the competition only has their word. Use Insights data to demonstrate how you'll enable them to overachieve.

"We purchased Xactly Insights to speed up our executive reporting and validate our strategy with benchmarking to assure that we could recruit and retain top sales talent."

Linked in

5. Benchmark against prior-period performance and industry peers

The Challenge
Analyzing period-over-period performance is often tricky and provides an incomplete/inaccurate picture of growth over time. As challenging as it can be to track your own company's YoY performance, it's even trickier to see how you measure up against the competition.

The Solution
Insights for Sales makes it easy to analyze your own historical data to see how the business is growing, while simultaneously showcasing pay and performance results from best-in-class companies.

Your Competitive Advantage
You will have a thorough understanding of how your sales plans and performance stack up against your own business as well as against your peers. Beyond providing an edge when competing for talent, this allows you to gain a true understanding for how well your business is operating in the market.

6. Improve Communication or Centers of Excellence with Standardized Reporting

The Challenge
Siloed business units often run unique reports based on their own biases and opinions. Moreover, it's often the case that certain departments are largely responsible for disseminating reports across the business. While this succeeds in bringing diversity of perspective to cross-functional meetings, it can often make it difficult to have an organized, impactful discussion.

The Solution
Insights for Sales offers a standardized set of out-of-the-box metrics and reports, creating a common core of data with an intuitive UI. With everyone basing their arguments and discussion points on the same set of information, conversations are more productive.

Your Competitive Advantage
Business-critical data is democratized across your organization, meaning your partners are more informed and prepared to make data-driven decisions that will positively impact the business.

"Xactly Insights allows us to benchmark against other companies and see how we compare — that's invaluable to us."

looker

"To add the dimension of the Sales view is genius; I think it's a great product"

PROS.

Whether you're a data-savvy sales leader or typically operate by gut feel, it's not always easy to figure out where you should be focusing your attention. With Insights for Sales, we're taking the guesswork out of sales analytics and giving you straightforward, out-of-the-box metrics so that you can better understand your team's past, present, and future performance.

THE XACTLY ADVANTAGE

Xactly is the only company in the industry capable of this cross-industry and cross-company analysis. From inception, we designed our multi-tenant SaaS platform to anonymize and aggregate incentive plans, results, and associated performance that we automate and analyze. This data, consisting of tens of thousands of incentive plans, and hundreds of thousands of sales reps, is available for our customers leverage when analyzing performance and optimizing incentive programs.
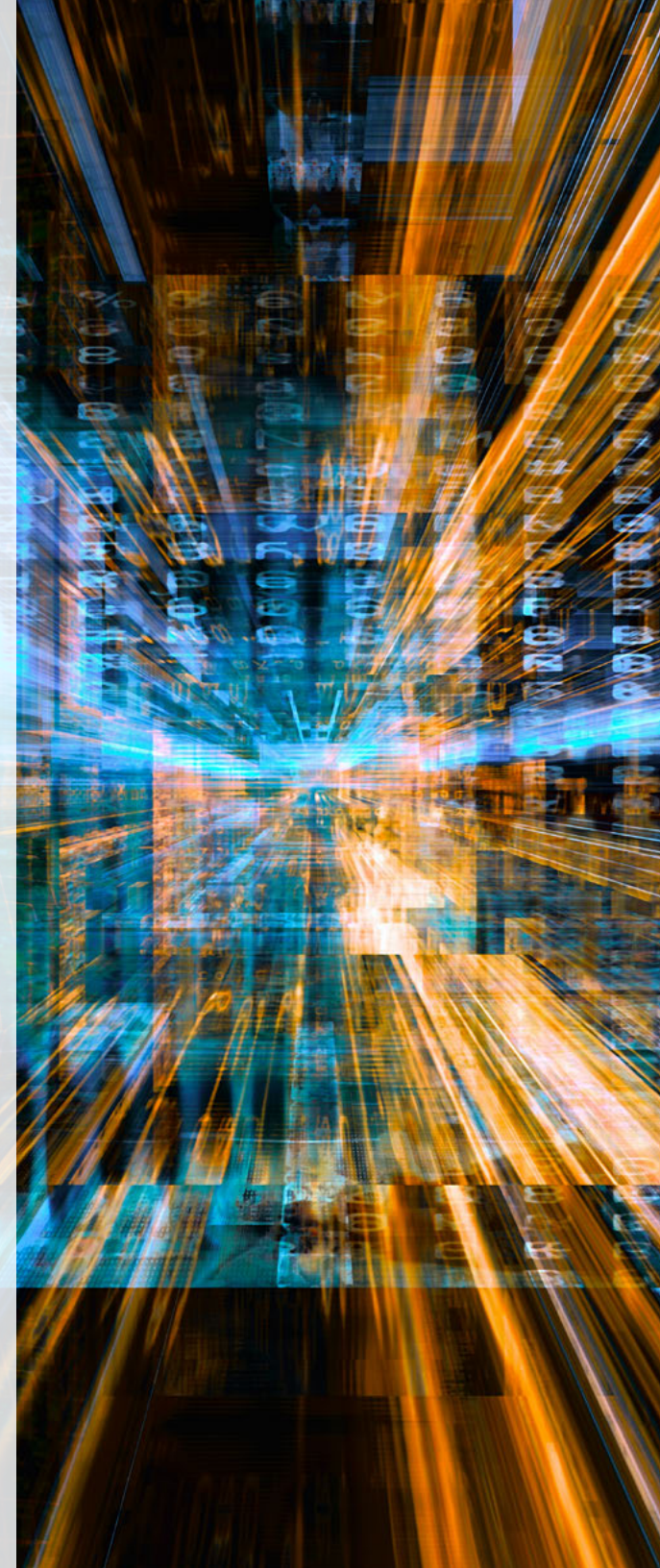
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