



REPORTING & ANALYTICS OPTIMIZATION ASSESSMENT

STRATEGIC SERVICES



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Clients often desire to increase their utilization of their compensation data in order to help drive plan analysis. However, necessary data and metrics are frequently not available in the appropriate context to provide the right type of insight and analysis needed for effective program evaluation. Plan changes and impact of changes are difficult to measure and track. Because of this lack of insight, decisions to change plan components to influence behavior are done based on intuition rather than data to support the action.

By leveraging sales compensation and performance data from your Xactly Incent environment, you can use Analytics as a powerful reporting tool in tracking the effectiveness of your sales program and anticipating challenges before they become issues. Xactly Analytics & Reporting Assessments provide specific and tailored recommendations based on your organization's sales objectives. These recommendations can be utilized across your organization to help ensure successful and effective analysis of your sales compensation data.

Combined with key Plan Effectiveness and Performance reporting best practices, Xactly Strategic Services works directly with clients to develop strategic reporting & analytics recommendations necessary to ensure successful analysis of the client's sales compensation program.

EXAMPLES OF RECOMMENDED REPORTING

Standard ICM reporting solutions just focus on basic reporting as it relates to sales team performance. Xactly leverages the ICM system and data to develop a higher level of analysis that provides invaluable insights into how the program is performing at various levels.

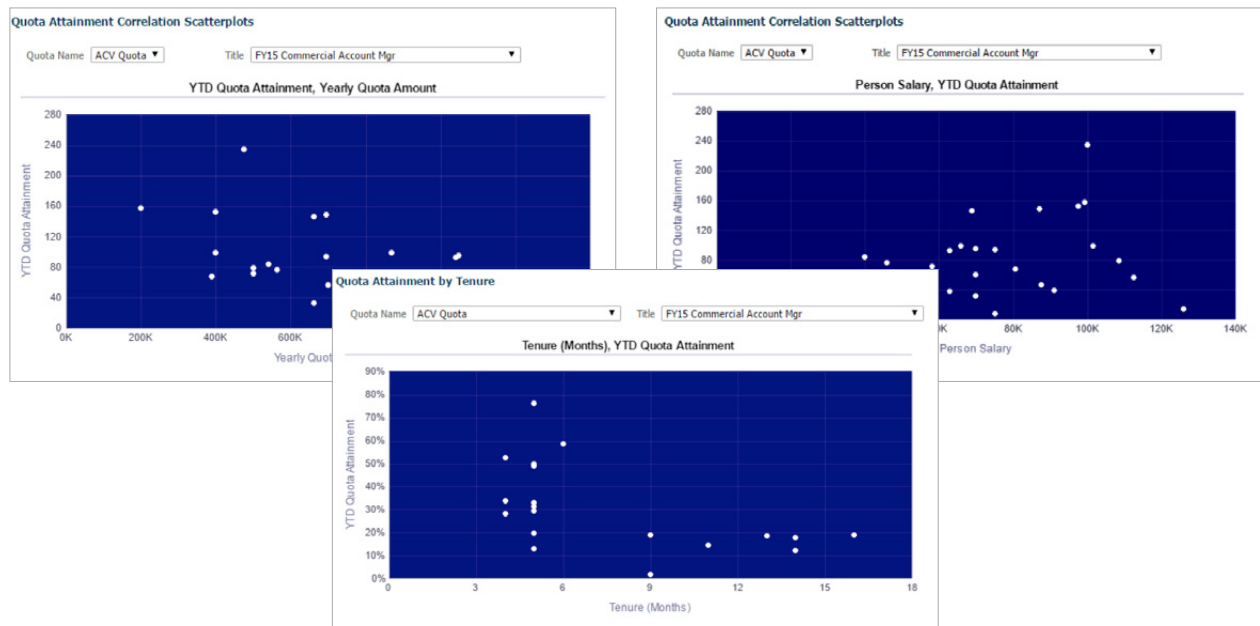
To help illustrate this type of analysis, below are two reports developed collaboratively with an Xactly client to leverage their use of Analytics to develop a deep understanding of the effects of their current sales plans on results.

Pay for Performance Dashboard for Sales Management:



This report dashboard was created for the client's sales management and leadership teams. The data represents how commission is being earned across various plan components and how overall goal attainment relates to target incentive attainment. Utilizing this data, the management team can clearly identify where the variable compensation spend is going, and which sales measures are getting the attention of the sales team. This dashboard also allows leadership to gain insight into performance and goal accuracy, and identify outliers in real-time for further investigation. By developing this understanding throughout the plan year, necessary changes for the following New Year's plans become clear.

Quota Attainment Correlation Dashboard:



This dashboard represents various Quota Attainment Correlations and allows sales leadership to determine if quotas are being appropriately set. They are able to see if their employees are producing expected results based on salary, tenure, and quota amount. In this example, the Client wanted to easily determine if their most tenured employees were consistently producing favorable attainment results. In addition to this metric, the Client was also able to see if there was correlation between their employees' salary and their attainment performance. This allowed them to determine if their top paid reps were truly producing the expected results. This analysis was particularly beneficial to have available as the Client made key organizational decisions moving into the new plan year.

GOALS/OUTPUT

Ultimately, clients receive a strategic reporting package that allows them to effectively track their compensation metrics and perform valuable performance analysis on their sales team productivity. Specific reports and configuration parameters will be outlined for the client to either build the report to their

specifications and liking, or allow the Xactly team to construct the report for them.

By having key compensation reporting in place, our clients are able to improve their use of compensation data and translate that data into beneficial analysis and changes such as:

- **Allow for easier plan change analysis.** Because data is available and key metrics are ready to use at any time, sales leaders can strategize and model changes quickly and with accuracy
- **Elimination of unnecessary and ineffective plan components and exceptions.** Because reporting is in place to more thoroughly understand compensation spend and effectiveness of various plan, many clients observe an opportunity to eliminate some complexities and standardize plans if the exceptions or bonuses are not effective
- **Greater transparency for sales teams.** By providing key metrics for their revenue and incentive activities, individual payees as well as sales leaders are able to effectively observe and track sales results. By having the right information available as they need it, sales leaders as well as reps are able to change focus and improve outcomes earlier, if needed.

Over 55% of our clients are effectively utilizing Analytics reporting and are benefiting from the many ways strategic reporting can help ensure successful analysis of their sales compensation programs. Analytics clients are more likely to actively track program effectiveness metrics and over 40% rate themselves as above average or best in class in regards to their current sales compensation program administration. Let Xactly Strategic Services elevate your utilization of Analytics and allow you to effectively analyze your compensation data to help influence future compensation program management.

ABOUT XACTLY STRATEGIC SERVICES

Xactly Strategic Services is a consulting practice that combines best-in-class technology, incentive compensation expertise, and big data from Xactly Insights™ to help clients improve the effectiveness and efficiency of their incentive compensation program and the technology that supports their compensation administration processes. Our consulting engagements are designed to optimize clients' incentive processes, their use of the Xactly platform, and their sales compensation plans, allowing for a greater return on your incentive compensation investment.

If you are interested in learning more about Strategic Reporting Assessments, please let your customer success representative know, or contact the Strategic Services Team at strategicservices@xactlycorp.com.