

OPTIMIZING XACTLY

The End User Experience

Considerations for improving the end user experience for Admin's and Sales during and following an implementation of Xactly Incent

A well-executed implementation of an Incentive Compensation Management (ICM) solution can still be considered unsuccessful if you have poor end user adoption of technology after you go live.

When thinking about sales end user experience, it is important to keep in mind the following categories of initiatives: Implementation Considerations, End User Go-Live and Training, and Administration Support. In the section below, you will review key best practice recommendations that, when put into practice, can result in high or increased adoption and utilization of your ICM technology.

IMPLEMENTATION CONSIDERATIONS

Reporting

- Spend time during the requirements phase with end-users (management & payees) to develop expectations for their needs as it relates to sales compensation data (e.g. what type of data, when they need it, format and frequency)
- Utilize relevant PODs on the end user homepage can provide a one stop shop for the end users to gain insight into key metrics and results related to their sales compensation program (i.e. attainments, revenue/payments to date, workflows, etc..).
- Having a properly formatted Incentive Statement with intuitive labels will allow the end user to easily consume and interpret their results.
- Where possible, leverage formats and views that the team is already familiar with when deploying reports in Xactly that are consistent with the legacy program

Analytics

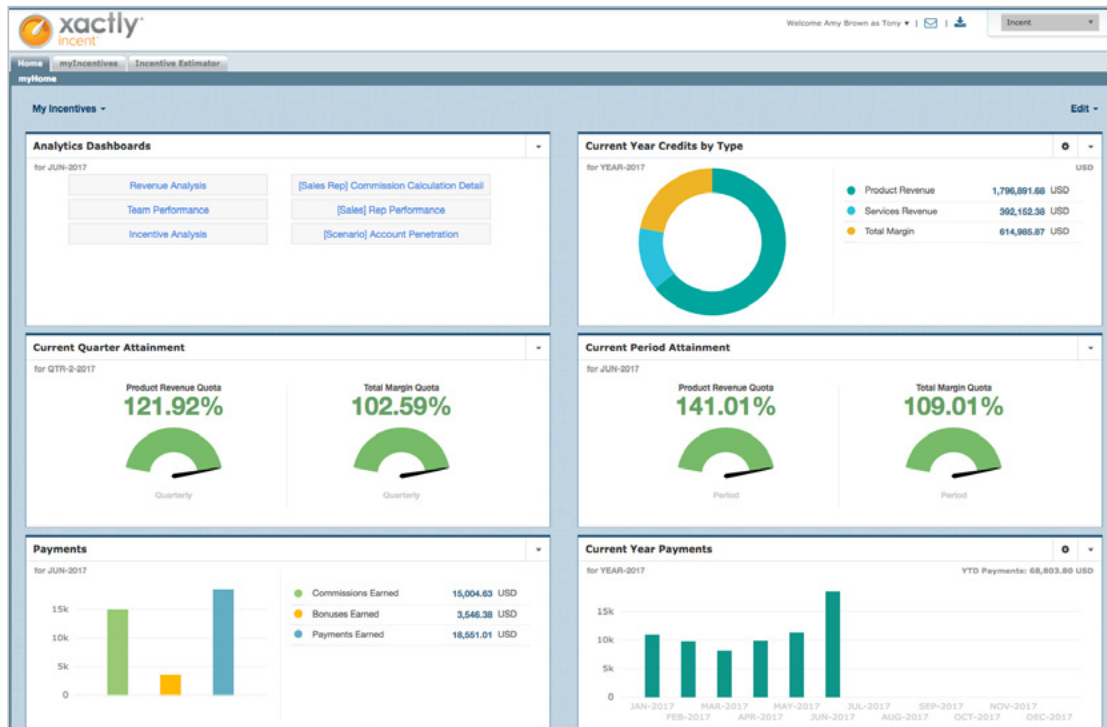
- Building out analytics dashboards based on sales rep and mgmt. requirements in Analytics can provide a centralized repository of various performance and plan metrics for all payees including management to use for performance and plan effectiveness tracking.
- Ensure that the transactional and people data needed by the end users to create various Analytics will be included in your configuration roadmap.

Estimator/Illustrator

- Utilizing either Estimator or Illustrator functionality can allow end users to estimate expected commissions in “what if” scenarios while minimizing the manual shadow accounting that occurs when reps do this activity on their own. A well-executed implementation of an Incentive Compensation Management (ICM) solution can still be considered unsuccessful if you have poor end user adoption of technology after you go live.

Use of Workflows

- Utilize native application Plan Templates and Workflows to create, distribute, and track approvals related to compensation plans
- Create defined, user-initiated workflows in Incent that will allow sales end users to submit inquiries and requests via the homepage interface, eliminating the need to track multiple emails and/or repetitive phone calls to resolve issues upon Go-Live.



GO-LIVE AND TRAINING

- Leverage short training videos that can be incorporated into your learning management system (LMS) requiring completion of courses or sessions before access to system is provided (can be used at initial launch and for new-hires).
- Use a dedicated Sandbox environment with “dummy” accounts for live training and/or to develop training material for initial launch, updates and new-hires.
- If situation allows, leverage a soft or trial rollout with a select group of payees to evaluate your process and gain insights from the users on what can be done to increase your success when the larger roll-out happens
- Provide training to the sales management team prior to sales reps seeing the system to ensure they are ready to support the launch and field questions from their team members
- Prepare FAQ documents or new year training material that end users can reference to help alleviate repetitive inquiries and end user confusion related to utilizing the tool (example: FAQ Document and Xactly Training webinar provided on intranet or company portal for easy access).
- Schedule time to connect face to face with sales management to build rapport, understanding, and championing of the Xactly toolset.

ADMINISTRATION SUPPORT

On-going Communication with End Users

- Utilize the Xactly pop up message functionality on end user homepages to share updates or key information each period about calendars, processing times, etc.
- Post a visible calendar for dispute submission, estimated payout dates, etc.
- Utilize a central point of contact source (or team) for all admin needs while leveraging native workflow functionality to automate inquiries and approvals as appropriate.

The more effort sales compensation administrators put into optimizing and communicating the benefits of using the Xactly toolset to their sales end users, the easier it will be to ensure high end user adoption of your ICM investment.

Xactly Strategic Services would like to thank our Austin clients for helping provide valuable end user best practice experience and feedback to help support this data sheet.

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 ICM Readiness Assessments, please let your customer success representative know, or contact the Strategic Services Team at strategicservices@xactlycorp.com.