

OPTIMIZING XACTLY: HOW A SAAS COMPANY IMPROVED UTILIZATION AND MITIGATED RISK

CHALLENGE

A global SaaS software company needed to improve their operational capability to meet payroll deadlines and deliver sales compensation documents to reps in a timely fashion. To achieve these goals, the company wanted to ensure they were utilizing their Xactly sales compensation performance technology to its fullest potential. The company had implemented Xactly Incent more than 5 years ago, and while calculation of sales compensation was automated and producing expected results, the company was struggling with inefficient processes around the tool and a knowledge gap due to employee turnover.

SOLUTION

Recognizing that they needed to optimize their skillset and take advantage of the full capability of Xactly Incent, the leading incentive compensation management tool in the industry, the company partnered with Xactly Strategic Services to conduct an Xactly Incent Health Check.

During the first step of the Health Check, an Xactly consultant performed an in-depth review of the company's Incent configuration and utilization of the application. This end-to-end analysis of Xactly Incent included a:

- Comparison of utilization and configuration to best practices
- Review all configuration components needed to support calculation and sales compensation plan documentation
- Review of Sales-facing reporting

A detailed Health Check report was then created based on the findings and analysis of the review. Both best practices and specific client concerns were inputs into the report, and a roadmap of potential improvement opportunities was identified.

After the Health Check report was created, the Xactly consultant and company administration team met for a one day on-site workshop to review the findings and prescriptive roadmap to pave the way for better utilization of the application.

By engaging Strategic Services, the company was able to:

- Enhance administration efficiency through configuration improvements, saving over 300 hours a year in processing time
- Eliminate missed payroll risks
- Successfully achieve their goal of distributing sales plan documentation ahead of annual Sales Kick Off

The roadmap was divided into 2 main sections:

1. **Quick Wins:** Multiple items were identified that would provide immediate efficiency gains, such as utilizing functionality, like quota relationships, pay curve functionality, and tags to reduce administrative burden saving valuable administration cycle time.
2. **High Value, High Impact Initiatives:** Additional items were called out, such as creating configuration governance and a quality assurance (QA) program using core Incent functionality to ensure optimal management of Xactly Incent.

During the workshop, the company was able to address additional concerns with their current configuration and receive demonstrations on how to improve their set-up based on Health Check findings. A follow up meeting a few weeks later was able to address any additional questions that the company had as they reviewed the health check findings and next step initiatives.

RESULTS

By completing the Health Check project on their Xactly instance, the company quickly received improved ROI for their investment in the project. By addressing the quick win items, the company was able to save 50+ hours in the new plan set up process this year and produced plan documents in January, ahead of their sales kick off meeting.

The largest benefit for the company was that after implementing the health check recommendations related to QA capabilities, the company was able to reduce their payroll processing time from one week to a day and a half. The Xactly consultant showed the company how to leverage multiple QA functionalities within Incent to proactively identify and troubleshoot each pay period calculation. Previously, the company had to spend multiple days reconciling data and correcting errors due to manual processes.

By optimizing their Xactly technology, the company's administration team has saved dozens of hours each month by eliminating tactical tasks and is now utilizing that time to improve upstream processes.

Finally, the administration team has gained tremendous confidence in their ability to manage Xactly Incent going forward by ensuring configuration best practices are followed.