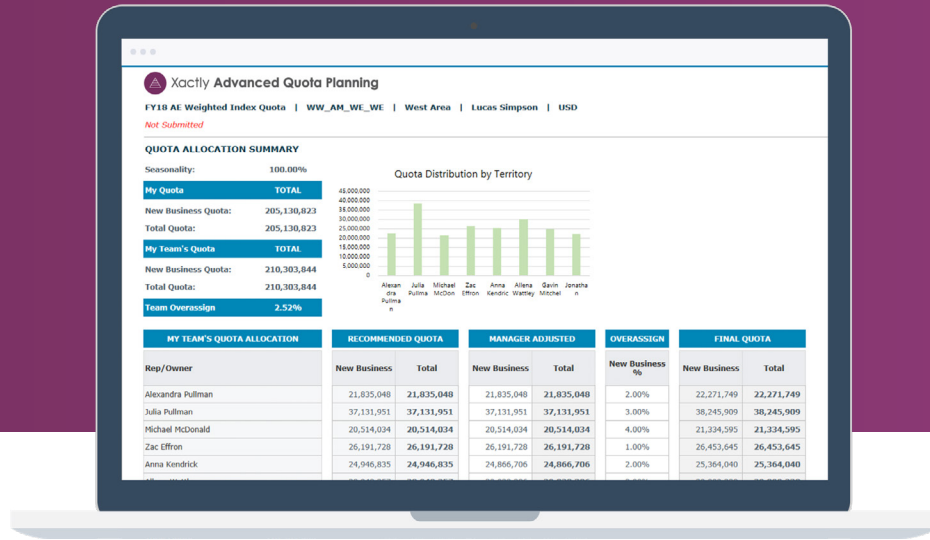# Xactly **Advanced Quota Planning**

Xactly's quota solution enables organizations to easily create a custom approach to manage complex quota planning processes; increasing productivity by 25%.

AUTOMATED AND DATA-DRIVEN

Automate calculations and reduce administrative burdens by leveraging predictive data, such as historical performance, account potential, market opportunity, and territory data to support quota allocation decisions. Streamline quota planning to aid in creating equitable quotas that motivate sales performance.

CONTINUOUS OPTIMIZATION

Create iterative snapshots of your plan and model "what-if" scenarios and monthly forecasts to compare them against each other. Proactively monitor and continuously optimize quotas to adapt to market conditions. Track workforce events, such as new hires, promotions, and territory/account transfers, and automatically calculate date effective quotas for individuals who have been impacted.

DECENTRALIZED PLANNING TO EASE COLLABORATION

Collaborate efficiently across different departments, including Sales Operations, Finance, Sales Leadership, etc. Consolidate your decentralized quota inputs in real-time, and easily report at any level of your sales or territory hierarchy. Set thresholds and validations to ensure that quota inputs adhere to company guidelines. Reconcile your quota allocations against the targets provided by Finance to ensure you are always aligned with your corporate goals.

FLEXIBILITY TO DEPLOY DIFFERENT QUOTA SETTING METHODS

Design and visualize top-down, bottom-up (e.g. account-based), or a combination of quota setting processes to best align with your various quota types. Leverage relationship-based mapping to automatically derive quotas for overlay/support roles. Apply over/under assignments to your quota setting process to accommodate targets provided by Finance.

WORKFLOW GOVERNANCE & INTEGRATION WITH OTHER SYSTEMS

Maximize the reliability of your quota setting process by standardizing quota templates and reports across your business units, and enforce alignment throughout your organization. Have your workflows bi-directionally integrate seamlessly with CRM, ICM, and other systems. Additionally, transfer data via Xactly Connect to integrate with your sales performance management tech stack.

WORLD CLASS SALES PERFORMANCE MANAGEMENT

15+ Years of Pay and Performance Data

Planning

Sales Capacity
Forecasting
Quota Allocation
Territory Alignment & Optimization

Execution

Compensation Management
Commission Expense Accounting

Optimization

Sales Analytics
Coaching Quota Attainment
Objectives Management

SALES PERFORMANCE AI PLATFORM

⚬ Xactly **Connect**

CRM   CPQ   ERP   HCM

All of This is Backed by Xactly's Superior Service and Support

PLANNING

Streamline and simplify sales planning processes, including territory, quota and workforce planning, incentive compensation design, and accrual forecasting

- **Increase productivity** – by lowering the time spent on territory planning, and gain selling time with compact and travel efficient territories
- **Build trust** – with error-free compensation payouts and data-driven territory design
- **Increase forecasting accuracy** – by easily running commission forecasts as deals change

EXECUTION

Achieve higher growth with a motivated and engaged sales force and ensure critical processes are executed faster and more accurately with ICM and commission expense accounting

- **Provide accurate financial forecasts** – with a more precise picture of your company's commissions data
- **Maximize the ROI of your SPM solutions** – with standards-based data integration capabilities that fit within your existing infrastructure
- **Automate key business workflows** – to increase efficiencies, improve alignment, and eliminate errors

OPTIMIZATION

Harness the value of AI and ML to optimize the performance of your sales organization with access to 15+ years of aggregated pay and performance data, and provide a recommended course of action

- **Drive sales productivity** – with a comprehensive view into the health and performance of your sales team in order to make needed adjustments
- **Quickly spot risk factors** – to predict sales rep attrition, clusters of under-performance, and changes in sales indicators
- **Make coaching more effective** – with individual performance insights, such as year-over-year quota attainment comparisons and access to staked rankings comparisons