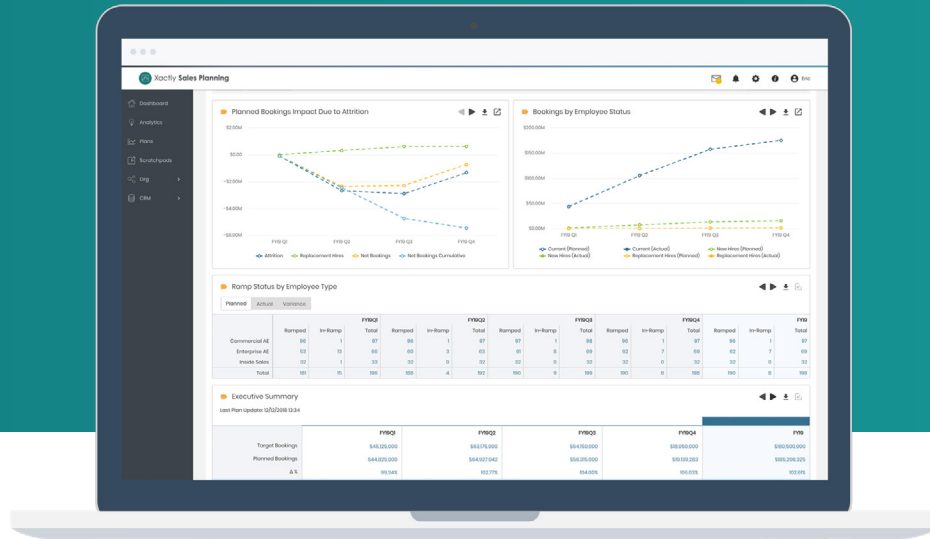# Xactly **Sales Planning**

Xactly's automated, purpose-built sales planning solution empowers organizations to easily create and continuously monitor and optimize sales capacity and quota plans, increasing quota attainment by 15%.

AUTOMATED AND DATA-DRIVEN

Automate the sales coverage and capacity planning processes, and determine the optimal resources required to hit bookings goals. Streamline quota planning to create equitable quotas and motivate sales performance. Leverage historical sourcing, ramp, seasonality, quota attainment data, and more to optimally allocate resources across territories, products, business segments, and sales roles.

CONTINUOUS COLLABORATION AND OPTIMIZATION

Leverage a data-driven approach to build trust and collaborate efficiently across different departments, including Sales Operations, Finance, Sales Leadership, Board of Directors, etc. Create iterative snapshots of your plan, model "what-if" scenarios and monthly forecasts, and analyze side-by-side comparisons. Proactively monitor and continuously optimize sales plans with changes in real-time business conditions to course correct as required.

ENHANCE INSIGHTS WITH ARTIFICIAL INTELLIGENCE (AI)

Enhance decision making by leveraging AI to predict key metrics including ideal ramp times, quota targets and seasonality in sales. With out-of-the-box KPIs and dashboards integrating historical and real-time data, proactively analyze metrics to spot and correct problem areas faster.

INTEGRATE SEAMLESSLY WITH CRM, ICM, AND OTHER SYSTEMS

Integrate seamlessly with your existing CRM such as Salesforce, ICM solutions such as Xactly Incent, and other enterprise systems with Xactly Connect to transfer data and thus enable a holistic approach to sales planning.

RAPID PATH TO PRODUCTION

Design, develop and deploy sales planning across your company within a few weeks and at low implementation cost. Configure and customize the pre-built solution to suit your business needs and evolve as your business changes.

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