

Xactly Advanced Quota Planning

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QUOTA ALLOCATION	SUMMARY							
Seasonality:	100.00%	Quota Distribution by Territory						
My Quota	TOTAL							
New Business Quota:	205,130,823	40,000,000 35,000,000						
Total Quota:	205,130,823	30,000,000		I.				
My Team's Quota	TOTAL	20,000,000			-			
New Business Quota:								
new business Quota:	210,303,844	5,000,000	_					
Total Quota:	210,303,844 210,303,844	0 Alexa		Zac Anna Allena	Gavin Jonatha			
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Total Quota: Team Overassign MY TEAM'S QUOTA	210,303,844 2.52%	o Alexa dra Pullm n RECOMMEND	Pullma McDon	Effron Kendric Wattley MANAGER J	Mitchel n	New Business		
Total Quota: Team Overassign MY TEAM'S QUOTA. Rep/Owner	210,303,844 2.52%	Alexandra dra Pulim n RECOMMENT	Pullma McDon	MANAGER /	ADJUSTED Total	New Business	New Business	Total
Total Quota: Team Overassign MY TEAM'S QUOTA Rep/Owner Alexandra Pullman	210,303,844 2.52%	Alexa dra Pullm n RECOMMENT New Business 21,835,048	Pullma McDon PED QUOTA Total 21,835,048	MANAGER / New Business 21,835,048	ADJUSTED Total 21,835,048	New Business %	New Business 22,271,749	Total 22,271,749
Total Quota: Team Overassign MY TEAM'S QUOTA Rep/Owner Alexandra Pullman Julia Pullman	210,303,844 2.52%	0 478 478 9 101 101 101 101 101 101 101	Pullma McDon DED QUOTA Total 21,835,048 37,131,951	MANAGER A New Business 21,835,048 37,131,951	ADJUSTED Total 21,835,048 37,131,951	New Business % 2.00% 3.00%	New Business 22,271,749 38,245,909	Total 22,271,749 38,245,909

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.

AGILE REVENUE PERFORMANCE



Xactly supports thousands of companies and empowers millions of sales reps. With 16+ years of expertise in developing purpose built solutions in a dynamic product platform, we power the world's most famous and complex organizations with their sales planning, incentives, and data-driven decision making.

In an increasingly changing world, organizational agility is crucial to survival and success. Xactly is uniquely positioned to drive this within sales organizations of all sizes. Our focus on SPM helps automate and streamline operations and develop organizational best practices. And a holistic ecosystem ensures not one rep, supporting team or relevant data point is ever lost in the shuffle.

XACTLY'S FIVE AREAS OF FOCUS:

PLAN - Ensure the organization has the right capacity to deliver territory designs to create maximum deployment efficiency. Xactly also delivers relevant predictions for attrition, hiring, onboarding, ramp time and more.

MANAGE - Manage the reality of real-world situations in a continuous fashion. Xactly's distributed tools help sales and finance leaders model and adjust in real-time.

INCENT - Build well-designed compensation programs that drive high performing sales teams. Xactly's robust and secure platform automates complex commission calculations and rules at scale. Increased visibility in the sales organization develops trust, engagement and motivation to drive desired results.

ANALYZE - Capitalize on 16+ years of Xactly's proprietary, aggregated and anonymized, pay and performance data. To take a step further, when applied to artificial intelligence and machine learning algorithms, the result is actionable insights that drive high performing sales teams.

INTEGRATE - Integrate seamlessly with existing technology stack and maximize your investment ROI. Xactly's solutions allow customers to efficiently manage end-to-end data processing and data management needed to automate critical SPM processes. All with great flexibility and ease.



For More Information Visit www.xactlycorp.com or call 1.866.GO.XACTLY (469.2285) to learn how Xactly lets you pay sales commissions on time and error free, motivating your sales team to do more.