

Sales teams experience constant change — from significant growth to personnel changes to shifting market conditions. These challenges are further amplified by siloed processes and homegrown systems that lack version control. Without the proper tools and processes in place, these changes can result in bottlenecks that have lasting impacts on a business.

Xactly Operational Sales Management (OSM) automates the day-to-day management of sales organization changes by driving efficiencies in four key areas: roster, territory, quota, and credit.

ROSTER: Account for Personnel Changes Without Impacting Productivity

- ▶ Maintain agility by quickly adjusting targets as personnel changes occur.
- ▶ Integrate with Workday and other platforms to automate processes and eliminate time-consuming, error-prone tasks related to existing and speculative hires.
- ▶ Capture sales team events such as promotions, role changes and new hires, and notify sales operations via reporting analytics and approval workflows.

TERRITORY: Manage Complex Sales Territory Structures and Changes Holistically

- ▶ Update assigned territories based on personnel moves and role changes without relying on complex spreadsheets.
- ▶ Leverage purpose-built analytics to proactively identify problem areas, such as unassigned or improperly assigned territories, and imbalanced coverage models.
- ▶ Integrate with CRM, HCM and ERP systems, and data warehouses to identify gaps and opportunities for improvement.

QUOTA: Maintain Quota Alignment While Alleviating Administrative Burden

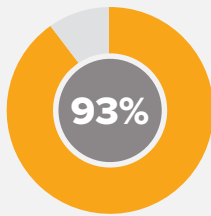
- ▶ Manage traditional planning methodologies and team-based quotas, while reducing dependence on manual tasks.
- ▶ Prioritize and maintain alignment between territories and quotas, especially during periods of change.
- ▶ Leverage logic rules and name assignments when deriving quotas for secondary and overlay teams.
- ▶ Use Scenario Modeling to view planned quota changes or potential impacts of changes before they become operationalized via user-defined workflow processes.

CREDIT: Manage Ongoing Credit Assignment Changes to Align with Incentives and Goals

- ▶ Gain visibility to all crediting process details to ensure accuracy around issued credits and adjust to one-off situations such as windfall sales or special split conditions.
- ▶ Prioritize accuracy and agility via a fully audited process, incorporating workflows to drive alignment.

WHY TRANSFORM REVENUE NOW?

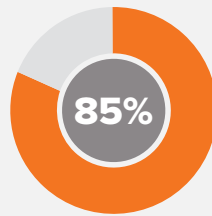
NOT AGILE



of companies believe their existing revenue operating models cannot keep pace with changing market conditions.*

* [ACCENTURE](#)

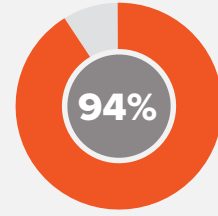
NOT EFFICIENT



of organizations have been unable to grow their revenue and expand their margins over an extended period of time.*

* [MCKINSEY](#)

TOO RESOURCE INTENSIVE



of revenue leaders are not confident about their team's ability to meet or exceed revenue goals going forward.*

* [GARTNER](#)

CORPORATE BOARDS WANT REVENUE THAT IS:



RESILIENT

Consistent revenue growth that thrives in volatile & competitive markets



PROFITABLE

Efficient revenue growth that unlocks new market opportunities



PREDICTABLE

Reliable revenue growth that is removed from intuition bias

IN RESPONSE, LEADERS WANT TO INCREASE:

AUTOMATION

Integration across systems and processes

COLLABORATION

Alignment across stakeholder teams

ACTIONABILITY

Insights to support better decision making

CONTINUITY

Agility to course-correct in real-time

TO ACHIEVE BREAKTHROUGH RESULTS:

37% faster revenue growth for firms that operate with organizational agility.*

* [THE ECONOMIST](#)

15% increase in margin by maximizing sales force effectiveness.*

* [BCG](#)

10% over-performance on revenue targets for revenue intelligent companies.⁶

* [FORRESTER](#)

WITH THE XACTLY INTELLIGENT REVENUE PLATFORM



ENHANCE PREDICTABILITY REVENUE INTELLIGENCE

FORECAST | INSIGHTS | BENCHMARKS

- ▶ Create predictable, accurate revenue forecasts.
- ▶ Make strategic decisions at lightspeed with accurate revenue data at your fingertips.
- ▶ Benchmark pay and performance against Xactly's proprietary, industry-standard dataset of 16+ years.



INCREASE PROFITABILITY WITH REVENUE PERFORMANCE

INCENTIVES | OBJECTIVES | EXPENSES

- ▶ Automate and scale complex incentive calculations with Xactly's robust and secure platform.
- ▶ Drive high-performance revenue teams with effective compensation programs.
- ▶ Motivate desired behaviors and strengthen trust with increased commissions visibility.



IMPROVE RESILIENCY WITH REVENUE OPTIMIZATION

CAPACITY | TERRITORIES | QUOTAS

- ▶ Uncover necessary changes to optimize revenue plans, quotas, territories.
- ▶ Respond to and navigate unforeseen disruptions with agility.
- ▶ Create hyper-efficient revenue teams by ensuring proper capacity and territory design.



16+ YEARS OF EMPIRICAL DATA
INTEGRATIONS | FRAMEWORK | GUIDES

Xactly has helped thousands of companies and millions of sellers around the world beat their revenue targets. Using the Xactly Intelligent Revenue Platform, leaders look past the current quarter to create revenue streams for long-term growth. It is the only solution that aligns seller behavior with boardroom strategy to create a resilient, predictable, and profitable business.

To learn more about Xactly and the latest issues and trends in intelligent revenue, follow us on [Twitter](#), [Facebook](#), [LinkedIn](#) and subscribe to our [blog](#).
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