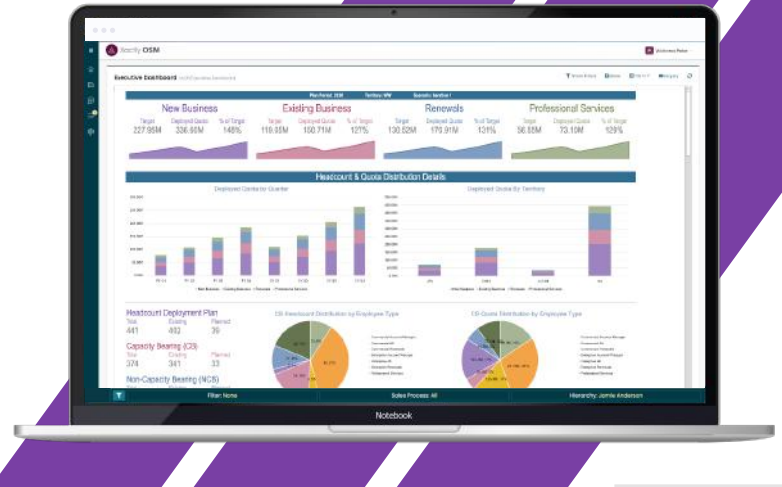# Xactly OSM™

Operational Sales Management

Translate sales plans into revenue growth by automating and unifying operations for roster, territory, quota and credit data

Sales turnover has always been a challenge, but in recent years, it has only gotten worse. A recent Xactly study shows that 58% of companies experienced higher voluntary sales turnover within the last several years. In addition to managing data complexity and manual processes related to sales operations, sales and revenue leaders wonder if their targets are attainable and how to keep up with constant changes across their sales organization.

Xactly Operational Sales Management™ equips organizations with the agility they need to manage personnel and territory changes and maintain transparency of quotas, incentives, and goals in a centralized solution with reduced administrative burden across the organization.

MAINTAIN AGILITY BY QUICKLY ADJUSTING TARGETS AS PERSONNEL CHANGES OCCUR

Capture sales team events such as promotions, role changes and new hires, and notify sales operations via reporting analytics and approval workflows.

▶ View your roster and track changes in a single source of truth.
▶ Integrate with Workday and other platforms to automate processes and eliminate time-consuming, error-prone tasks related to existing and speculative hires.

MANAGE COMPLEX SALES TERRITORY STRUCTURES AND CHANGES HOLISTICALLY

Leverage purpose-built analytics to proactively identify problem areas, such as unassigned or improperly assigned territories, and imbalanced coverage models.

▶ Update assigned territories based on personnel moves and role changes without relying on complex spreadsheets.
▶ Integrate with CRM, HCM and ERP systems, and data warehouses to identify gaps and opportunities for improvement.

PRIORITIZE AND MAINTAIN QUOTA ALIGNMENT WHILE ALLEVIATING ADMINISTRATIVE BURDEN

Automate the quota management process to be agile enough to accommodate change and not require hours of manual work to keep up to date.

▶ Use Scenario Modeling to view planned quota changes or potential impacts of changes before they become operationalized via user-defined workflow processes.
▶ Leverage logic rules and name assignments when deriving quotas for secondary and overlay teams.

Xactly®

ALIGN INCENTIVES AND GOALS WITH ONGOING CREDIT ASSIGNMENT CHANGES

Ensure people get credit for the work they do, regardless of how complex the credit structure is.

▶ Gain visibility to all crediting process details to ensure accuracy around issued credits.

▶ Adjust to one-off situations such as windfall sales or special split conditions.

Why Xactly Operational Sales Management™?

Xactly understands the value of bringing together operational and intelligence capabilities to drive revenue operations success. That's why we built our Intelligent Revenue Platform, enabling us to align planning, performance, and prediction functions into one cohesive platform.

As part of the broader Intelligent Revenue Platform, Xactly Operational Sales Management enables revenue leaders to have confidence that their targets and plans are agile enough to address change, with a strong platform in place to optimize and execute in other areas of the business.

> "I've been with Flowserve 27 years. I know our customer base, our products, and our organization. What I don't know is if what we're doing is the most effective thing. That's why I rely on experts, and through solution workshops and assessments, Xactly helps us travel that path. They can inform our choices as a true partner in a relationship."

DAVID LOWE
Global Director of Sales Operations, Flowserve

FLOWSERVE

Increased efficiency
2-3x
by automating processes

Increased productivity
12%
by integrating processes

>> READY TO GET STARTED? <<

To learn more about Xactly Operational Sales Management™, visit our website to request a demo at xactlycorp.com.

ABOUT XACTLY

Xactly has helped thousands of companies and millions of sellers around the world beat their revenue targets. Using Xactly's solutions, leaders look past the current quarter to create revenue streams for long-term growth.

The Xactly Intelligent Revenue Platform marries artificial intelligence and 17 years of proprietary data in easy-to-use applications. Sentiment, process and trend analysis come together to form accurate machine forecasts. Quick identification and implementation of revenue plan, quota and territory improvements is easy. And, rapid calculation of even the most complex compensation plans keeps sales reps motivated and on track. This makes the Xactly Intelligent Revenue Platform the only solution that aligns seller behavior with boardroom strategy to create a resilient, predictable and profitable business.

Xactly