

A man and a woman are sitting at a white desk in a modern office. The man, wearing glasses and a green shirt, is holding a tablet. The woman, wearing a grey blazer and a striped shirt, is looking at the tablet and smiling. In the background, other office workers are visible at their desks.

Xactly®

# Top Use Cases for Xactly OSM™

Boost Sales Team  
Success with Operational  
Sales Management

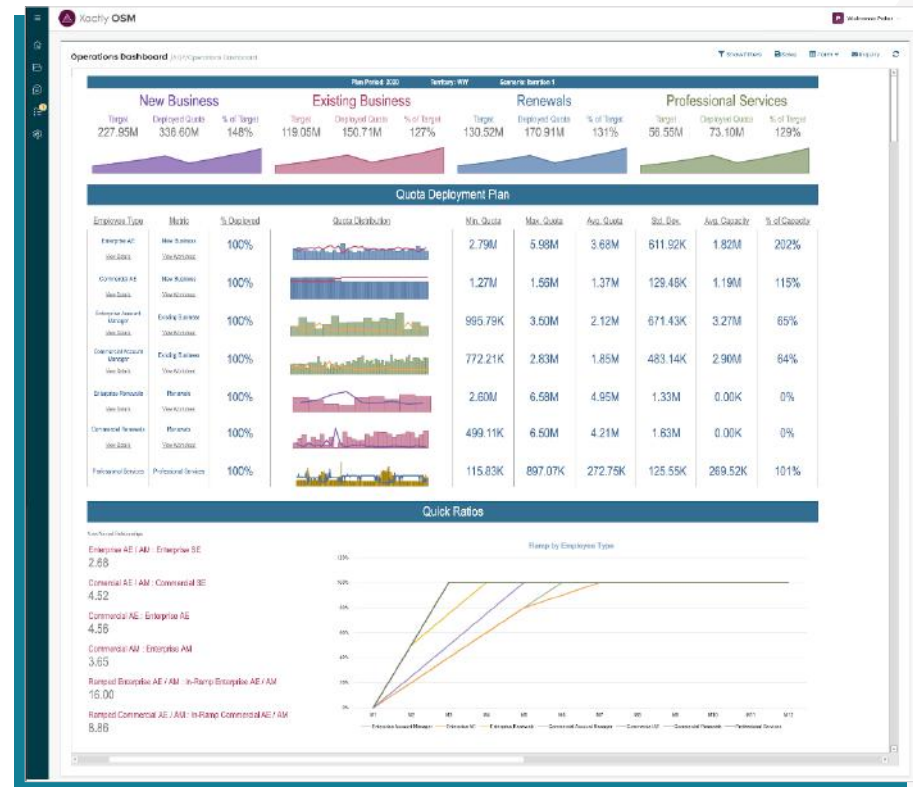
## What is Xactly OSM™?

Effectively operationalizing your sales plan is critical to not only the success of your sales teams, but also to your organization as a whole. But, what happens when it's managed manually through spreadsheets and by siloed teams across different departments? Unfortunately, this disconnected approach to sales planning creates a myriad of challenges. From struggling to keep data clean and accurate, to tasks taking much longer than they should, to leaders not having enough visibility into results, this is a reality many organizations deal with today.

That's where Xactly Operational Sales Management (OSM™) comes in to help organizations intelligently automate and execute sales planning activities. It equips organizations with the agility needed to:

- ▶ Manage personnel and territory changes
- ▶ Maintain transparency of quotas, incentives and goals in a centralized solution
- ▶ Reduce administrative burden across the organization
- ▶ Navigate sales team changes including promotions, hiring, attrition, quota changes, territory realignment, and more

OSM provides enterprise sales leaders access to a single source of truth that seamlessly integrates with their existing sales tech stack. The solution ensures leadership across Sales, Sales Operations, Compensation, and Finance can respond to continuous changes all while still hitting their revenue goals. By automating the management of day-to-day changes that inevitably occur within your sales organization, OSM creates efficiencies across four key areas: headcount, territory, quota, and credit.







## By using Xactly OSM™, you can:

### Increase Efficiency Across the Board

Technology can play an important role in creating lean and efficient compensation processes. It can help you eliminate duplication and speed up the workflow by automating specific tasks. This creates a positive ripple effect when it comes to streamlining day-to-day activities for your Compensation admins and Sales teams.

### Increase Accuracy and Timeliness of Compensation

According to Oracle, the average organization operates with a payroll percentage between 15–30%, so making sure those payments are accurate, on-time, and easy to understand is crucial to the success of your business. OSM allows you to pay sellers faster by providing live updates that give you the information you need throughout the entirety of the compensation period, not just when the deal closes.

### Improve Sales Engagement

Inspire your teams to drive higher sales by having direct and real-time access to their commission statements. OSM can help you quickly determine commission payout based on sales data. It calculates sales commissions in a simple and easy manner so that reps can enter their individual pay data and instantly be told what they can expect on their next payout statement.



# Xactly OSM™ Use-Cases



## 1. Inform Credit Assignments with Advanced Analytics

**Challenge:** Sales crediting can easily become a source of grief if you cannot accurately identify who should be compensated for each deal. Without accuracy, sales teams become frustrated, lose motivation, or worst of all, lose trust.

**Solution:** Through its user-friendly design, OSM gives you the ability to manage crediting rules in a simple, user-intuitive manner.

**Advantage:** OSM allows you to more easily manage account-crediting within the platform, and gives your team the ability to leverage data from Xactly Incent®. This helps you to strategically leverage compensation plans to drive sales performance, revenue, and profitability.



## 2. Track Personnel Changes in a Single Source of Truth

**Challenge:** Organizations usually plan and account for team changes throughout the year. But, unexpected layoffs or attrition can cause painful delays and miscommunication between Human Resources and Sales Operations, resulting in insufficient lead time to make crucial plan adjustments.

**Solution:** OSM automates the process of tracking and consolidating workforce changes through purpose-built integrations with applications like Xactly Incent® and Workday.

**Advantage:** Using advanced analytics and reporting, OSM can model changes, such as terminations, new hires, promotions, or transfers, that are likely to occur and notify Sales Operations in advance. This allows you to remain agile during change.

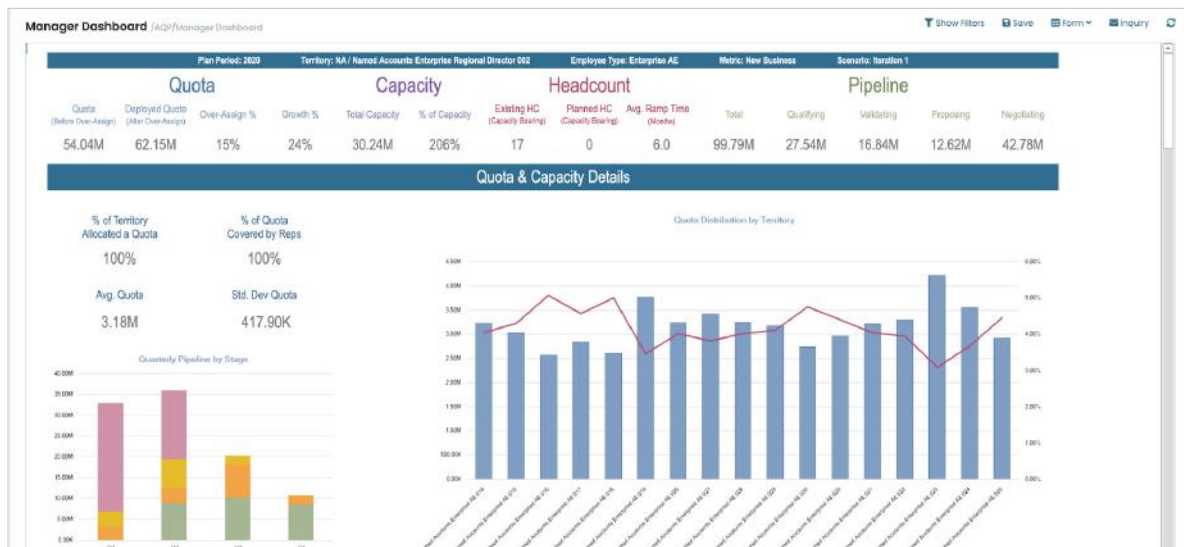


## 3. Automate Quota Management

**Challenge:** The complexity of data and processes associated with creating, setting, and enforcing quota can prove overwhelming to organizations managing these initiatives manually. This creates a high level of administrative burden across the organization.

**Solution:** Make sure your go-to-market (GTM) strategies reflect your salesforce's ability to hit quota by using a reliable data source to set annual and quarterly numbers. With OSM, you can automatically calculate quotas based on preexisting or unique templates created by Sales leadership.

**Advantage:** OSM validates that 100% of quota is allocated appropriately among Sales team members. By streamlining processes, organizations can quickly change and take new approaches to quotas, territories, roles, and targets with their sales organizations based on shifting market dynamics.





## 4. Calculate Commission Scenarios

**Challenge:** Sales commission errors are a sales leader's nightmare. One comma in the wrong place is all it takes to create an erroneous formula to completely throw off your data and decrease the credibility of your reporting and processes.

**Solution:** Harmonize your sales commission management system with all of your other business applications. From CRMs to ERPs, OSM can integrate with just about any business system or data source.

**Advantage:** OSM helps you determine potential commissions and saves you the time and monotony of managing multiple spreadsheets or homegrown system workarounds to calculate commissions.



## 5. Simplify Process Management

**Challenge:** Errors or changes that impact sales processes are painful to fix, especially if information has to be gathered from multiple siloed sources. When done manually, there's no insight into how long processes have been running incorrectly or what caused them to fail.

**Solution:** Invest in a comprehensive dashboard that gives full visibility into your company's headcount, territory, quota, and credit processes.

**Advantage:** Leverage dashboards and reporting to quickly identify system errors so you can optimize performance and ensure everything is running as it should. OSM allows you to create custom process and workflow logs that enable deep dive analysis going back several months.



## 6. Streamline Payout Approval Processes

**Challenge:** Inaccurate commission payouts can wreak havoc on sales performance and productivity, resulting in a lack of employee trust, poor sales engagement, and increased turnover.

**Solution:** Build approval workflows at multiple levels to shorten the payroll cycle, plan and record document approvals, and ultimately allow users to audit, monitor, and report on certain commission attributes.

**Advantage:** In addition to simplifying the entire process, when plans are automated it makes communication and visibility between reps and managers easier. This increases confidence in the accuracy of commission checks.





## How Flowserve Used OSM to Create Plan Stability

The pandemic hit manufacturers in an unexpected way which required organizations like Flowserve to shift current plans with speed and agility in order to carry on their day-to-day activities with as little disruption as possible.

Flowserve launched OSM during the peak of the pandemic. After working with Xactly experts, David Lowe, Director of Global Sales Operations at Flowserve, shared:

"I've been with Flowserve for 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. They can inform our choices as a true partner in this relationship."

With access to intuitive, real-time solutions, Lowe's team was able to rise to the occasion and prove that the organization as a whole could count on them to take control and navigate through uncertainty with confidence.







## UNIFY YOUR SALES DATA INTO ONE CENTRALIZED LOCATION:

OSM was designed to help companies break down barriers and pave the pathways to digital transformation. It empowers enterprises to update their plans rapidly by delivering pathways to revenue that connect data, increase ROI, and drive growth. According to McKinsey & Company, this type of operational agility has the potential to improve the customer experience by up to 30%, employee engagement by 20-30%, and operational performance by 30-50%.

To learn more about OSM, [contact an Xactly expert](#) today.



### 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.

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