



The CEL Entrepreneurial Consulting Team, part of the Olin Business School at Washington University in St. Louis, was commissioned to conduct an independent research study to determine the impact of implementing the Xactly Forecasting* solution. The primary objective of the research was to determine if there is a measurably significant impact on sales from using the product. A secondary objective was to determine the impact of integrating AI software into a company’s sales forecasting and pipeline management system process through empirical analysis.

SUMMARY OF FINDINGS: COMPANIES USING XACTLY FORECASTING



Handle 19% more opportunities per year



Make 58% more money per sale



Reduce sales cycles by up to 59%



Immediately increase bookings following implementation

RESEARCH METHODOLOGY

Quantitative analysis was conducted using regression analysis of user data to determine trends and correlation of results tied to the Forecasting solution. Regression and correlation analysis were performed on sales and opportunity metrics from before and after implementing Forecasting. The objective was to determine the impact and significance of key sales metrics. Regression analysis observes interdependencies between key metrics and independent variables across time.

The intent was to find metrics that have the highest impact on overall sales. An alpha of 0.05 was used to determine statistical significance. Most noteworthy, the research was able to quantify increases to new opportunities and close-won opportunities with statistical certainty.

Qualitative analysis via in-depth case studies was used to cross-check the regression analysis with business use cases.

KEY FINDINGS FROM THE QUANTITATIVE

Applied machine learning leads to higher efficiencies and increased win rates.

The sales organizations studied could handle more opportunities and had higher win rates than before implementing Forecasting.

	Small / Medium (SMB)	Large (Enterprise)
Annual Increase in New Opportunities	+21%	+18%
Annual Increase in Closed / Won	+14%	+15%

*In 2018, when the study was conducted, the product was owned by TopOPPS.

Using Forecasting leads to bigger opportunities and bookings

The research also found exponential growth in bookings and average deal size. Seventy-five percent of the companies demonstrated an immediate increase in their bookings in the following month/quarter of implementation.

	Small / Medium (SMB)	Large (Enterprise)
Bookings Growth	+86%	+51%
Opportunity Size Growth	+50%	+26%

CASE STUDY REVIEW

In addition to regression analysis, qualitative analysis of client data was examined using a case study lens. Case study analysis examined client data and processes before and after implementing Forecasting to understand areas and processes impacted. The case study approach confirmed the results from the quantitative regression analysis. Through examining specific companies, the research found significant examples of:

- ▶ Customers increasing the volume of sales (demonstrated by more opportunities closing),
- ▶ Bigger values retained (demonstrated by an increased booking and an increase in average opportunity size)
- ▶ Faster deal resolution (demonstrated by decreased Average Time to Close)



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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