

Xactly[®]

Mastering Sales Performance Management: A Guide to Digital Sales Transformation



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The Digital Transformation Boom

Our world is in a constant state of change. In the last year alone, the way we buy, sell, and interact with one another has drastically shifted. And this rate of transformation isn't slowing down any time soon. The one certainty is that adaptability is key. The companies that are able to assess, pivot, and make decisions quickly are those best suited to not only survive but accelerate their growth and performance. So what are these businesses doing to see that level of success? They're streamlining their digital transformation.

It's a trend that's not going unnoticed. BCG reports that 80 percent of CEOs say "digital transformation has become even more urgent in light of the [pandemic] crisis."¹ In addition, a whopping 94 percent of CFOs want more transformative change in their organizations, and 64 percent pinpoint digital transformation as a high-priority strategic initiative for the next six months.²

As a result, there has been a surge in digital transformation worldwide. Research from Dell Technologies' Digital Transformation Index reports that "80 percent of organizations globally have fast-tracked some digital transformation programs."³

By implementing new technology and processes, leading organizations are empowering themselves to use their data strategically. This allows them to forecast, plan, and analyze performance more precisely and more frequently—something critical in today's fast-paced business environments and what 50 percent of CFOs say they want to be able to do over the next six months.²

However, for many organizations, it's easier said than done. Dell Technologies also found that more than half of executives fear they're not moving fast enough when it comes to digital transformation.³

With economic and global conditions changing almost daily, speed is essential for data to help drive better sales decisions. So how do sales organizations implement digital technology quickly and effectively?

It's simple: they choose the right solutions to empower them to react quickly when selling conditions change.

Mastering Accuracy & Agility with Sales Performance Management (SPM)

Successful digital transformation requires two fundamentals: data accuracy and agility to quickly make informed decisions. Unfortunately, that's not something that can be done with mountains of spreadsheets or home-grown systems. In fact, manual sales planning and incentive compensation management make it much more difficult. In order to achieve both accuracy and agility, you need the proper tools and processes.

XACTLY'S AGILE APPROACH TO Sales Performance Management



Automate and Integrate

Integration across systems and processes

Collaborative

Alignment across stakeholder teams

Data-Informed

Insights to support better decision making

Continuous

Agility to course-correct in real-time

Sales Performance Management (SPM) is a data-informed approach to plan, manage, compensate, and analyze sales performance at scale, allowing you to drive revenue and sustain a leadership position within your industry. Essentially, SPM empowers you to use your data as an intelligent resource to continuously gain insights, reduce risks, and make strategic decisions in real-time.

But with the many moving parts of a sales organization, it can be a bit overwhelming to know where to begin. The most important thing to remember is that Sales Performance Management isn't an overnight fix, nor is it a linear process. Every company's journey is unique. But regardless of your path, SPM helps you ensure data accuracy, improve efficiency, and move towards becoming an agile sales enterprise.

To help you navigate your digital transformation more successfully, here is a collection of best practices, tips, and success stories to guide you through the Sales Performance Management journey.

Incentive Compensation Management

Incentive Compensation Management (ICM) is the core of your sales organization and your biggest driver of revenue. It encompasses your sales incentive planning and administration of your compensation payouts. Of all the parts in your sales organization, this is the most common place to start when it comes to Sales Performance Management adoption.

THE OLD WAY

Incentives are the largest driver of sales behavior, but as selling circumstances have changed, many companies are slow to bring their compensation planning and execution processes up to speed. Planning is completed once per year, following the same structures and commission models of years before, and admins calculate it manually.

But, while this may be the tried and true way, spreadsheets and home-grown systems can be riddled with errors, eat up hours of administration time, are difficult to scale, and lack the ability to provide strategic insights.

THE NEW WAY

At the most foundational level, Sales Performance Management [automates your compensation processes](#). But to truly gain value from it, you must use it to do more than that. Sales Performance Management centralizes your data, ensuring version control and accuracy. Since calculation and reporting are digitized, this frees up more time to focus on intelligent analysis and planning. Because you can view performance in real-time, you can engage in continuous incentive planning, allowing you to make quick, strategic decisions.

THE OLD WAY

▶ Calculation Errors

Nearly 90 percent of all spreadsheets contain at least one error in one percent of formula cells, according to Oracle.⁴

▶ Time-consuming

It takes up to six weeks on average to manually calculate and payout incentives—not including revision time for errors.⁶

▶ Inability to Scale

Manually scaling documents exponentially increases the risk of errors and adds to the time it takes to process compensation.

▶ No Strategic Insights

You only have access to historical data. To gain strategic insights, trends, or opportunities for improvement, you have to spend hours manually analyzing it.

THE NEW WAY

Error-free Calculation

Enterprises can achieve data accuracy and eliminate more than 99 percent of calculation errors with automation.⁵

Maximized Efficiency

The average company spends less than three weeks to calculate and complete incentive administration using Sales Performance Management.⁶

Enhanced Scalability

As your team grows, you can easily expand, revise, and add reps to incentive plans without the risk of errors or additional time.

Intelligent Planning Insights

With easy-to-use dashboards, you can quickly analyze performance to uncover trends, identify opportunities, and adjust plans continuously.

SCALING SUCCESSFULLY THROUGH DISRUPTION

Databricks is a data and AI enterprise serving thousands of organizations worldwide with an open and unified platform for data engineering, machine learning, and analytics. When they began to expand quickly, administrators soon felt the overwhelming pressure to change plans frequently to keep up with the company's growth, goals, and needs. Spreadsheets would no longer suffice in managing the company's sales compensation. They decided to find a partner who would help them scale and manage their incentives efficiently, and found Xactly Incent.

“ If you didn’t have a solution like Xactly, you would be spending all your time doing calculations and just making payroll. With Xactly, you are freed up and can start to give insights to the business on top performers. You have access to more analytics versus just cranking a commission calculator. We are now able to provide the high-level data analytics our finance team needs to make critical decisions.”

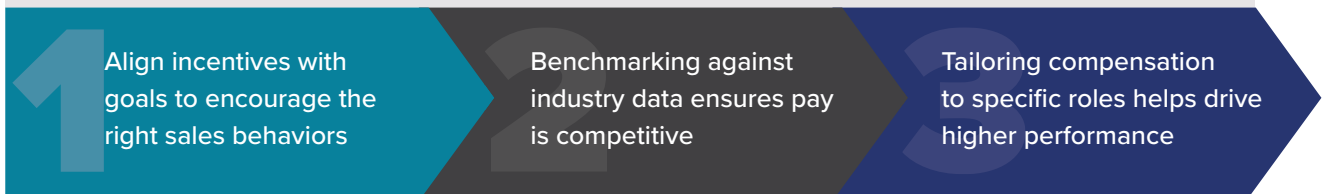
Juli Spagnuolo, Senior Manager, Global Sales Compensation Manager, Databricks



Using Xactly Incent, Databricks was able to scale its compensation alongside company growth, successfully paying a 2500 percent larger team than they originally began with. The solution has reduced the time spent preparing for financial review meetings by 83 percent and helped their team establish more productive and mutually-beneficial relationships with the finance department.

When the global pandemic hit, Databricks was able to manage growth, scale, and pivot quickly. Using Xactly, the sales compensation team at Databricks has moved away from purely tactical administration, and elevated their roles to achieve a more strategic seat at the table. Given the circumstances that many companies are currently in, Databricks has maintained its positive momentum—while making changes that accelerate their business.

INCENTIVE COMPENSATION BEST PRACTICES



Sales Quota and Territory Planning

Nearly every company knows that sales planning is crucial to its success, yet 64 percent report correct quota setting as the major challenge for their sales compensation program,⁷ and more than 64 percent say they are not effective at territory design.⁸ Between capacity, quotas, and territories, your sales plan touches nearly every part of your organization.

Like your incentive compensation, having the right data to guide planning and decision making is essential. Your quotas need to be realistic, yet aggressive enough to meet your goals (with the expectation that not every rep will hit their number). For territory design, you need to be able to target the right areas and assign the best reps to each area. How do you determine that without the right solutions?

THE OLD WAY

The tried and true method has been to set it and forget it after an annual planning session. Leadership gathers all the key stakeholders for a yearly performance review and if last year’s plan worked, it’s likely reinstated with a few minor adjustments, and stays that way for the entire year.

The problem with this approach is that it's outdated and it's not ensuring you're on the most strategic path at any given moment. For example, if you map territories by cities with professional sports teams, how do you know you're hitting every opportunity out there? In short, you don't.

Manual sales planning tends to rely on experience to guide any changes to the annual sales plan. But if you have all this data, why are you relying on your gut instinct when you can use factual insights to plan more precisely?

THE NEW WAY

Today's world changes too quickly to rely on a plan you created when circumstances were completely different. When disruption hits, your entire sales operations can be impacted. That means your territories and quotas need to be adaptable. You need access to the latest insights to make sure you're always leading reps in the right direction and targeting the areas that will enable them to close more deals.

Sales Performance Management helps you combine the power of historical and third-party data to model a variety of scenarios. For [quota planning](#), this helps you set the right targets for the amount of reps you have, while accounting for new hire ramp times. It also enables you to [optimize territory design](#) by pinpointing the strongest areas to go after, setting your reps up for success.

THE OLD WAY

- ▶ **Mediocre Territory Performance**
More than 40 percent of sales organizations miss their annual targets.⁹
- ▶ **Lengthy Planning Time**
Designing territories by circling big hubs on a map and manually assigning them is an inaccurate, time-consuming process.
- ▶ **Guesswork Territory Alignment**
On average, enterprises will miss the equivalent of up to 10 percent of annual sales due to ineffective management of sales territories, quota and compensation plans.¹⁰
- ▶ **Inability to Compare Potential Outcomes**
Without Sales Performance Management, leaders are left relying on gut instincts, without the ability to plan for different situations.

THE NEW WAY

-  **Higher-performing Territories**
Using Sales Performance Management, companies increase sales objective attainment up to 30 percent.⁸
-  **Agile Planning Processes**
The average business saves up to 75 percent of planning time using Sales Performance Management.⁸
-  **Customer Base Growth**
Teams using digital technology to plan quotas and design territories see up to 10 percent expansion of their customer base.⁷
-  **Strategic Modeling Capabilities**
Sales Performance Management uses artificial intelligence to analyze data and model scenarios to help leaders plan strategically and effectively.

A SEAMLESS TRANSITION TO OPTIMIZED SALES TERRITORIES

A leading HR enterprise with a sales force of over 3,000 reps and 360 sales leaders developed a data-driven framework for building territories. As they began to build a virtual sales team, the organization was able to

reassess their existing territory solution. In the search for a new territory management system, they were focused on finding a partner who would allow them to easily input data, visualize territory maps, and better organize their sales team structure—all while ensuring territories were effectively designed and optimized.

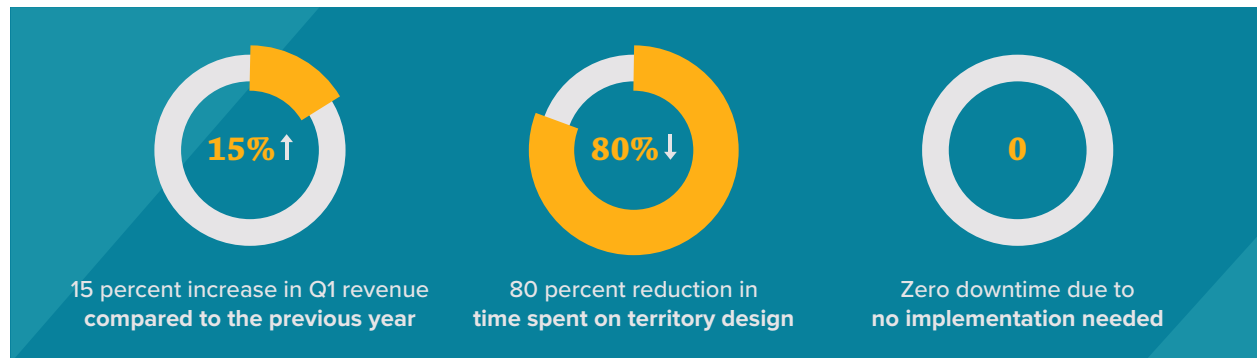
The organization ultimately decided to adopt Xactly AlignStar. Because they had experience using territory design technology, the company was able to immediately deploy the solution, quickly model and visualize variations of territory designs, and seamlessly integrate AlignStar with their existing tools, including Xactly Incent.

“ The biggest reason to choose Xactly was the potential to grow with other products within the company. The service I received from Xactly was outstanding and their support team being extremely responsive reinforced we made the right decision choosing Xactly.”

Sales Analyst, HR SaaS Company



Since adopting Xactly AlignStar, the HR company has used the solution to model and identify new opportunities that were previously overlooked by manual planning processes. This allowed the business to build virtual sales teams successfully and access new analytics that were instrumental in the decision-making processes and procedures. In addition, the HR enterprise saw company-wide improvements, including:



Today, the company leverages Xactly Alignstar to model and identify opportunities where their virtual sales team would be better suited based on location, skill level, relationships, and areas of expertise. Due to the quick implementation and adoption, their teams were able to immediately begin modeling and visualizing multiple variations of territory designs based on data. As a result, their sales teams are experiencing continued success and exponential growth.

SALES PLANNING BEST PRACTICES

1 Analyze sales capacity and ramp times to determine more accurate quotas

2 Use third-party industry data to identify additional white space territory opportunities

3 Identify your ideal customer profiles to prioritize prospects in different target areas

Sales Forecasting

Forecasting plays a key role in making agile decisions. In order to maximize performance and revenue, you must be able to predict future performance as precisely as possible. Unfortunately, more than half of sales leaders don't have confidence in their ability to forecast accurately,¹⁰ and the Miller Heiman Group reports that nearly 80 percent of organizations have less than 75 percent sales forecasting accuracy¹¹



With selling conditions changing so quickly, leaders don't have time to waste worrying if opportunities in their pipeline are up to date, or manually validating and ensuring their team's forecasts make sense at every level of the sales org. They need the ability to look at their pipeline holistically to call their number with confidence and in real time.

THE OLD WAY

Historically, organizations have relied on spreadsheets to manage their sales forecasts. As a result, sales leaders only deliver half of their committed forecast on a consistent basis. This approach limits leadership's visibility into the overall pipeline and increases the chances of data inconsistency, both of which are detrimental to accurate forecasts.

Without insights into selling behaviors, it becomes difficult to know how deals are progressing through the pipeline and where there are snags in the sales cycle. This leaves leaders unable to make agile changes, pivot sales strategy effectively, and provide adequate rep coaching. And that means organizations are forecasting with gut instinct rather than using real data, which is a very dangerous situation to be in when markets are uncertain and every deal counts.

THE NEW WAY

Using [sales forecasting technology](#), you reduce the chance of manual error and immediately increase visibility and data consistency across your entire company. But the real value lies in the additional insights gained from artificial intelligence (AI) and machine learning using Sales Performance Management.





With CRM data being auto-captured and a unified view of the sales pipeline, leaders now have critical sales cycle insights at their fingertips for timely decision making: high-potential opportunities, deals at-risk, common reasons deals are lost, stages where deal progression tends to slow, etc. Machine learning also helps identify, track and guide positive selling behaviors on successful deals, allowing leaders to know when to intervene to progress deals or identify where reps may need additional training.

When you add in information around market and economic changes, you can understand what potential changes you may need to make, and the more precise your forecasting becomes. Together, all of these data insights influence quota, territory, and incentive design, improving your sales planning and management across the board.

THE OLD WAY

- ▶ **Inaccurate, Inconsistent Forecasts**
Without sales forecasting technology, less than 20 percent of organizations have a forecasting accuracy above 75 percent.¹¹
- ▶ **Limited Visibility**
Leaders have little insight into why deal progression slows or why they are lost outside of a rep's notes in the CRM.
- ▶ **Lack of Strategic Insights**
Leaders are unable to analyze data granularly to uncover vital trends, identify high-potential deals, and more.
- ▶ **Inefficient Selling Activities**
Sales reps struggle with productivity and spend on average 27 percent of their time on internal administrative activities.¹²

THE NEW WAY

-  **Call Numbers with Confidence**
98 percent of sales ops professionals and sales leadership say that AI technology has improved their forecasting accuracy.¹³
-  **Increased Pipeline Visibility**
Leaders can examine deal progression, selling cycles, and sales rep activity more closely to better predict performance.
-  **Intelligent Data Trends**
Artificial intelligence and machine learning arm leaders with valuable insights to enable timely decision-making.
-  **Improved Sales Performance**
Companies that embrace digital technology innovation experience nearly 20 percent higher gross margin than the laggards.¹⁴

PREDICTING FUTURE PERFORMANCE WITH PRECISION

A leading SaaS enterprise operating in over 130 countries was searching for a way to strengthen their forecasting accuracy and visibility. Historically, teams were required to manually review all pending deals and rely heavily on gut instinct around the pipeline. As a result, forecasts were based more on past experience and instinct rather than hard data.

When the pandemic hit, the need for accuracy grew exponentially, and the company decided to look for a solution that would improve revenue predictability, increase rep performance, and enhance the partnership between Sales and Finance teams.

Ultimately, the organization decided to add Xactly Forecasting to existing Sales Performance Management solutions. This ultimately allowed the SaaS provider to immediately have readily-consumable insights at hand to make rapid and educated decisions that benefit the business.

“Xactly Forecasting is ‘a revenue creation tool.’ Because of the visibility I have, I can compare opportunities and focus on the ones that are most likely to close. This has allowed me to pull deals forward and keep the momentum of the business flowing.”

Chief Sales Officer, SaaS technology provider



Using Xactly Forecasting, the organization was able to increase forecasting accuracy, as well as:

- ▶ Uncover an entirely new level of pipeline intelligence and transparency with the solution's user-friendly dashboard
- ▶ Visualize deal progression in real time
- ▶ Close the gap between commit and quota using AI-guided sales coaching and selling
- ▶ Easily manage and explain multi-level sales forecasts from sales rep to CEO
- ▶ Increase the quality and completeness of CRM data without taking any more time from the sales team

SALES FORECASTING BEST PRACTICES



Operational Sales Management

In every organization, sales planning and management occur at various levels to create quotas, territories, and incentives. Together, these become your sales strategy and your game plan to go after and close deals. But they must be aligned and designed cohesively in order to be successful. Data is essential to getting this right, but it's not just strategic insights. You also need for your entire organization to be on the same page.

THE OLD WAY

Manual sales planning and management tend to fall victim to siloed operations. When data is housed in multiple spreadsheets and different locations, it's hard to maintain version control, let alone gain a clear understanding of where you stand. This can lead to inaccurate data sharing, misinformed decisions, and misaligned sales plans. And when markets are shifting at a rapid pace, there's little room for error and no time to waste.

THE NEW WAY




Data is essential in every part of your business, but what's more important is that it is accurate and visible across your entire team. Sales Performance Management (SPM) centralizes your data into a singular location, ensuring everyone is viewing the same information. With the right SPM provider, you can derive strategic insights from your data and ensure your processes are automated, collaborative, data-informed, and continuous—something also known as [Operational Sales Management \(OSM\)](#).

OSM seamlessly aligns your sales planning and management from start to finish and enables you to streamline processes, increasing efficiency and improving productivity.

THE OLD WAY

- ▶ **Siloed Planning & Management**
Data is scattered and inaccurate, misaligning teams and making it difficult to effectively plan and manage sales performance.
- ▶ **Inability to Make Quick Changes**
Manual planning and management makes it extremely difficult to make changes to plans efficiently—especially as your team grows.
- ▶ **Focused on Historical Data**
Without intelligent analysis, you can only focus on historical data and are limited in your ability to gain strategic insights.
- ▶ **Lack of Strategic Partner**
Plan design and changes are based on gut instincts and limited information, making it hard to drive high levels of performance.

THE NEW WAY

-  **Aligned Sales Operations**
Enterprises have an end-to-end approach to Sales Performance Management that connects data across the entire organization.
-  **Agile, Simplified Plan Revisions**
Sales Performance Management centralizes data, making it easy to act quickly, model plan changes, and maintain momentum.
-  **Predictive and Prescriptive Intelligence**
Sales Performance Management uses artificial intelligence to provide predictive and prescriptive insights for nimble planning.
-  **Access to Expert Advice**
Sales Performance Management partners provide expert consultation and insights to continuously improve planning and management.

PIVOTING AND ACCELERATING THROUGH A GLOBAL CRISIS

Flowserve is a global manufacturing and service provider of fluid control devices operating in over 50 countries with more than 17,500 employees worldwide. In 2020, for the first time in history, the supply, demand, and workforce were all impacted by the pandemic at the same time. And for Flowserve, it was the largest instability and disruption it had experienced since they were established over 230 years ago.

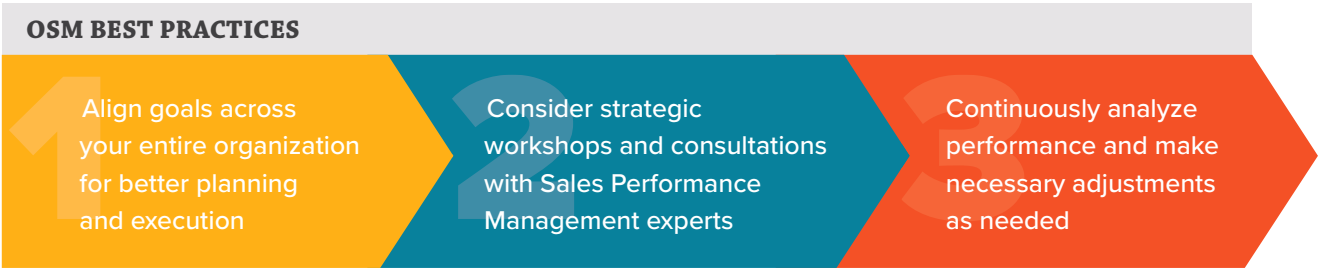
When disruption first surfaced in their APAC markets, Flowserve had to pivot incentive plans in order to respond to current threats. With real-time visibility into their global markets, they were able to provide teams with a snapshot of performance in real time, allowing them to drill down into potential problem areas. Because of this, their teams were able to shift focus and redirect current selling strategy in order to reflect new buying realities.

“**The pace of change was ever-present prior to COVID-19, yet as a result of the pandemic, the modifications we needed to make increased by nearly 100 percent. To maintain the accelerated velocity of this disruption, we had to be able to anticipate and react to situations with both speed and agility. Transformation happens when you can respond to any kind of change, and adapt to the situation by using data to determine which strategic levers to pull. This can only happen when you combine SPM and digital transformation. It’s the game changer to achieve real revenue results.”**

David Lowe, Global Director of Sales Operations, Flowserve



By having a thumb on the pulse of their sales department, Flowserve was able to utilize their existing technology, [Xactly Incent](#), to navigate instability and motivate internal sales teams to sell efficiently and with relevancy. By partnering with Xactly, they are also able to continuously make plan changes easily, empowering their team to focus on strategy and growth rather than administrative tasks.



Sales Performance Management Implementation

Implementation is a critical process in Sales Performance Management adoption that has many moving parts and requires different areas of business to work in sync even when obstacles are thrown in their way. It can seem like a daunting task—but it doesn't have to be. The most important factor is finding the right partner.

THE OLD WAY

Depending on the technology you were adopting, implementation could go one of two ways: 1) installing programs on your computer or downloading the application from the internet, or 2) a provider comes in and rushes through a standard implementation with little communication. Either way, once you've got the set up, the provider vanishes. For any issues that may occur, you're stuck calling a customer support line, sitting on hold, and hoping someone can walk you through the solution.

THE NEW WAY





During implementation, choosing a partner that will not only do the up-front work, but will also be there every step of the way, from contract to implementation and beyond. Sales Performance Management is centered on continuous planning and improvement. That means you may need to make changes, reconfigure set ups, and even consider reinventing the way you design your quotas, territories, and incentives.

The best providers will create a strategic implementation plan with you, communicate from the start, and pay special care to the unique needs of your organization. And most importantly, they remain in contact even after you're up and running—making sure you have direct access to a support team member assigned to you even beyond technical issues.

THE OLD WAY

- ▶ **One-size-fits-all Implementation**
A provider completes a standard implementation without regard to your company's needs and priorities.
- ▶ **Minimal Communication**
Throughout implementation, there is little communication around the process and customers are minimally involved.
- ▶ **Little to No Customer Support**
For technical issues, customers call a general support hotline or must rely on forums or other online resources.
- ▶ **No Additional Services**
Once implementation is complete, the vendor-customer relationship essentially ends, and any communication stops.

THE NEW WAY

-  **Customized, Tailored Implementation**
Strategic SPM partners create a detailed implementation plan that fits your timeline needs and ensures a smooth transition.
-  **Continuous Communication**
Customers are highly involved in the process, learning to use the system as they implement it for their organization.
-  **Support Beyond Technical Issues**
Users have assigned customer support rep(s) who are dedicated to solving technical issues and providing additional assistance.
-  **Training and Certification Opportunities**
There are additional consultation services available for customers, as well as training and certification to use solutions effectively.

PARTNERING FOR A SMOOTH TRANSITION TO DIGITAL TRANSFORMATION

Baker Hughes Company is an American international industrial service company and one of the world's largest oil field service enterprises. The company provides the oil and gas industry with products and services for drilling, formation evaluation, completion, production, and consulting.

After a search to better manage their incentive compensation and sales planning, they decided to implement Xactly Incent and Advanced Quota Planning.

However, for Baker Hughes, the biggest challenge was implementation timing. They deployed Xactly in December during their fourth quarter, which meant they needed to transition to a new Sales Performance Management solution in the busiest time of year, while still maintaining a seamless experience for thousands of end-users. Due to the inherent complexity and size of their organization, they needed a partner that would scale and simplify that process. They had to also consider the best possible route in order to facilitate adoption across existing internal processes, data, and teams.

“Project management is absolutely critical. We had very strong, effective project management from the Xactly team. Xactly has obviously done this thousands of times with thousands of customers, so they have great experience of how best to manage this type of implementation. So that was certainly very key.”

Ben Trewin, Sales Performance Management Leader, Baker Hughes



Xactly was able to assist Baker Hughes with a tailored and customized implementation plan that allowed them to phase in the new technology with minimal disruption. The company soon realized they were not only adopting a leading Sales Performance Management solution, but they also gained a strategic partner in Xactly through the process.



Making Digital Sales Transformation a Reality

The pathway to adopt Sales Performance Management isn't set in stone. Every organization has different needs and that makes each journey different. But what is true for businesses across the globe is that regardless of the path you take, agility and data accuracy are essential to succeed in today's world. And regardless of where you are in your digital transformation, you need the right partner beside you every step of the way.

[Xactly Sales Performance Management](#) is designed to empower enterprises to centralize their data and use it as a powerful resource to make strategic decisions and accelerate through any change. We understand the power data holds; it's in our DNA. It's why we're the only provider with more than 16 years of pay and performance insights to ensure our customers have meaningful baselines and are confident in their strategies.

At Xactly, customers are our focus, and because of that, our Services & Support teams are committed to helping organizations have an exceptional user experience. As a seven-time Gartner Magic Quadrant Leader in Sales Performance Management and with a 95.9 percent customer satisfaction rate, we create a smooth transition from old to new so companies of any size can build a solid foundation for sales success. From implementation and training to support and success, you will have experts by your side to ensure lasting success.

To learn more about Xactly's Sales Performance Management solutions, [schedule a personalized demo](#) today.



ABOUT XACTLY

Xactly is leading the way in Sales Performance Management (SPM) delivering planning, execution, and optimization to ambitious and complex sales organizations. We partner with the world's leading enterprises to clear immediate sales roadblocks, enabling them to adapt with optimal sales capacity, territories, compensation plans and payment structures. Harnessing the power of AI, Xactly's scalable, cloud-based platform combines great software with the industry's most comprehensive 15-year data set to give customers the real-world insights they need to improve sales performance across the board by growing revenue, reducing risk, and containing costs.

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