

# Operational Sales Management

## An Agile Approach to Seamlessly Manage Change

Xactly's Operational Sales Management solution automates the management of the day to day change that inevitably occurs within the sales organization. The management of the sales team is critical to the success of an organization, but it's typically managed manually through disparate spreadsheets where it's hard to ensure proper data governance. As an organization starts to scale, a data-informed and automated approach to sales management is critical to sales success. Streamlining the time-consuming and error-prone process of managing employee changes allows organizations to operate in a more agile manner.

By connecting these processes and integrating them with a company's existing tech stack, Xactly's Operational Sales Management solution ensures leadership across sales, sales ops, compensation, and finance can effectively respond to the normalcy of change to still hit their revenue targets.

## The Impact of Adopting Operational Sales Management

### INCREASED EFFICIANCY

↑ **2-3x**

by automating processes

### INCREASED PRODUCTIVITY

↑ **12%**

by integrating processes

## Xactly's Operational Sales Management Solution Unifies Four Key Areas:

### People

Manage the go-to-market team and position movements:

- Sales Hierarchies
- Employee Reconciliation
- Payee Attribute Management

### Territory

Manage ongoing changes to territories:

- Account Hierarchies
- Account Assignments
- Territory Rule Definitions

### Quota

Manage quota deployment and ongoing changes:

- Top-Down, Bottom-Up and Derived Quota Deployment
- Quota Assignments
- Overlay Quota Rules

### Credit

Manage ongoing credit assignment by both rule and exception:

- Crediting Hierarchies
- Overlay Credits
- Territory and Transaction rule crediting

## A Customer's Perspective

"We've been investing in our entire Sales Performance Management platform for five years with the intent to connect all of the data. Xactly's team has allowed us to move much faster through some of these changes." - Justin Ritchie, AVP Enablement & Execution, Cox Automotive

## Benefits of Xactly's Operational Sales Management Solution

### Automated

Integrate seamlessly with your existing tech stack and automate processes to eliminate time-consuming and error-prone manual tasks.

### Collaborative

Ease collaboration across sales, sales leadership, and sales operations to seamlessly manage day-to-day changes.

### Continuous

Manage large data volumes with ease as your organization scales. Easily handle versioning and effective date changes to roster, territory, quota, and credits to ensure you're working with the best data to operationalize sales management inputs into incentive plan administration

### Data-Informed

Provide a single source of truth with customizable dashboards to track performance and quickly identify gaps in completing important changes to territories, quotas, sales reps, and managing credits.

Operational Sales Management is one of the five essential components of Sales Performance Management (SPM). Xactly, experts in SPM, provide five distinct solutions — plan, manage, integrate, incent, and analyze — to help enterprises simplify the complex and effectively navigate the normalcy of change to reach their organizational goals.

For additional information on Xactly's Plan, Manage, Integrate, Incent and Analyze solutions for SPM please visit our website.