

# Business Process Extension

Automate complex, cross-functional sales performance management processes to improve operational efficiency.



[Research shows](#) that 94% of workers perform repetitive, time-consuming tasks in their roles. Couple that with manual processes, strict deadlines, and varied compliance standards spanning multiple go-to-market (GTM) teams (e.g. Sales, Marketing, HR, Finance, Accounting, etc.) and you get a status quo of inefficiency and rigidity.

Xactly Extend compliments our award-winning prepackaged functionality with extensibility to deliver tailored solutions to automate nuanced processes - e.g. approvals, disputes, quota changes, crediting structures, and more - that span Xactly Solutions and data sources. Organizations can drive efficiencies and more meaningful insights by automating processes and uniting relevant stakeholders and data.



## INCREASE OPERATIONAL EFFICIENCY AND AGILITY

Automate your sales performance processes for faster operations, lower costs, and happier employees and customers.

- ▶ Redefine process execution by centralizing data to manage and track it all in one place.
- ▶ Utilize custom apps for more transparent and agile execution for all relevant teams.
- ▶ Make process execution more flexible and less prone to bottlenecks to give your teams time for more meaningful, non-routine work.
- ▶ Reduce manual activities that lead to errors and inaccuracies by unifying data from disjointed sources of truth.



## EXPERIENCE REAL-TIME DATA INSIGHTS

Unify and enrich data across business systems to uncover insights and track metrics that drive more informed decisions.

- ▶ Unite critical data sources to achieve holistic views of the business and optimize critical sales performance management areas (e.g., territories, quotas, and credits).
- ▶ Create new data breakouts with data from various business systems to identify advanced insights and areas to optimize.
- ▶ Leverage various data visualization options to view, track, and manage data.



Deal ID	Deal Name	Status	Amount	Date
1000000001	Deal A	Open	\$100,000	2024-01-01
1000000002	Deal B	Open	\$200,000	2024-01-02
1000000003	Deal C	Open	\$300,000	2024-01-03
1000000004	Deal D	Open	\$400,000	2024-01-04
1000000005	Deal E	Open	\$500,000	2024-01-05
1000000006	Deal F	Open	\$600,000	2024-01-06
1000000007	Deal G	Open	\$700,000	2024-01-07
1000000008	Deal H	Open	\$800,000	2024-01-08
1000000009	Deal I	Open	\$900,000	2024-01-09
1000000010	Deal J	Open	\$1,000,000	2024-01-10



## COLLABORATE MORE EFFECTIVELY ACROSS GTM TEAMS

Automate manual activities to increase transparency and audibility amongst teams.

- ▶ Change the way teams work together by leveraging a single source of truth to streamline manual work.
- ▶ Move essential reporting, reviews, and audits to one location, ensuring seamless cross-team execution.



## INTEGRATE SECURELY AND ACHIEVE ROI QUICKLY

Quickly and securely integrate data that spans multiple business systems to enhance decision-making and improve process execution with real-time data insights.

- ▶ Leverage custom applications to speed up internal processes and track progress in real-time.
- ▶ Ensure proper workflow and approvals, and gain control over data and processes with robust security, controlled access, and complete audit capabilities.

# Simplify Complex Business Processes With Xactly Extend®

Extend delivers custom-built applications created by Xactly experts that consolidate and simplify process execution. It serves as the system of record for these processes and acts as the connective tissue between Xactly solutions and external systems (e.g., CRM, HCM, ERP, etc.), ensuring proper data flow, compliance, and timeliness.

Xactly Extend provides a system of record to centralize, automate, and optimize business processes, including:



### Payroll Approvals

Simplify complex processes that span multiple stakeholders to mitigate risks and save time.



### Deal Claim and Discretionary Bonuses

Update and approve deal claims, bonuses and adjustments in a more streamlined and auditable manner.



### Allocations, Disputes & Inquires

Create dashboards and forms to more effectively manage processes revolving around manual adjustments.



### Data Hygiene and Validation

Leverage data connections and a variety of visualizations to maintain administrative dashboards and facilitate important work such as financial reporting, sales performance, and monitoring productivity and rate of return.

>> **READY TO GET STARTED?** <<

To learn more about Xactly Extend, visit our website to request a demo at [xactlycorp.com](https://xactlycorp.com)

# About Xactly

Xactly provides the only AI-powered platform that combines revenue intelligence and sales performance management so organizations can unlock their full revenue potential. Backed by two decades of pay and performance data, Xactly's Intelligent Revenue Platform is designed for finance, revenue, compensation, and sales leaders who want to drive quality, sustainable revenue. To learn more about Xactly and the latest issues and trends in revenue intelligence, visit us at [XactlyCorp.com](https://XactlyCorp.com), follow our [blog](#), and connect with us on [LinkedIn](#).

