

Xactly for CRM Provides simPRO Seamless Implementation and Quick Results for RevOps Team



About simPRO

simPRO is an industry leader in cloud-based job management software. Over 200,000 users in more than 7,000 companies worldwide trust simPRO with their business operations, from in-field estimating and quoting to back-office invoicing and payments and everything in between.

Background

All companies want their sales reps to think ahead, be financially motivated, and feel empowered. These qualities help sales reps stay engaged, close deals, and in turn, help their respective companies hit their number. Implementing Xactly for CRM has helped simPRO achieve these goals.

While sitting down with simPRO's Ricky Sevta, Chief Revenue Officer, and Mary Beetham, Compensation Administrator, we were able to get an inside look at simPRO before and after Xactly for CRM.

Challenges

simPRO was experiencing an incredible amount of growth and needed a sales compensation solution that could scale with them while helping solve some of their biggest day-to-day challenges. "We selected Xactly for CRM to fully automate our highly complicated, manual process and our highly complicated clawback process - a process that needed to look at sales, invoice, payment and incentive data over a long period of time," Beetham said.

Long hours, increased commission errors, no available reliable reporting around compensation and employee burnout were a few of the challenges that the revenue operations team had prior to implementing Xactly for CRM. The manual processes translated into a lack of visibility for simPRO's sales reps, who didn't have transparency into their compensation until the end of the month. This left them guessing and less motivated by their incentive plans.

simPRO needed a solution that could provide an accurate picture of commissions for salespeople, executives and the revenue operations team. simPRO was motivated to free their compensation team from arduous tasks and perpetually calculating commissions. Their incentive process was in need of strengthening; they knew it was only possible with an automated platform that easily integrated with Salesforce. "We needed something in Salesforce that helped us control and manage the complexities of our data and our plans, and that's where Xactly for CRM came in," Sevta shared.

One of the biggest reasons why companies are reluctant to switch from manual processes to software like Xactly is the implementation process. They fear that the transition from their current solution or process to an automated solution will be more of a challenge than it's worth. While this concern is valid, Xactly partners with its customers to make implementation as seamless as possible. Sevta shared, "Our implementation of Xactly for CRM went very well, happened at lightning speed, and there were no issues experienced by my team."

Results

With Xactly, simPRO has seen an increase in sales motivation, a rapid decrease in calculation errors and seamless automation of a previously complex compensation management process.

With Xactly for CRM, simPRO experienced the following:

- Time savings of 70% for manual commissions processes
- Enhanced competitive advantage from clarity and transparency for salespeople
- Reduction in manual work. Processing clawbacks has gone from a half day's work to zero because Xactly for CRM does it all automatically in a few clicks
- Greater reliability and data accuracy as the compensation team was able to move away from spreadsheets and shift to a centralized workflow
- Reduction in the risk of errors and miscalculations while providing management with greater confidence in the reliability of their data
- A crystal clear audit trail with every deal tracked through each step of the incentive process, from closed/won to when payments are finalized. When the finance team has audits or needs data on commissions, it is easy to get the information to them quickly
- A way to determine the effectiveness of their compensation programs overall by leveraging Salesforce analytical tools to help build intuitive dashboards and reports



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, follow our [blog](#), and connect with us on [LinkedIn](#).

