



SALES COMPENSATION AUTOMATION SOLUTIONS VENDOR GUIDE

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SALES COMPENSATION ADMINISTRATION VENDORS

Sales compensation administration software and service providers use powerful administration tools to track, report and model sales compensation transactions. Use this list of vendors to locate and assess the right administration software to help manage your pay program.

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Acknowledgment

This listing is updated each year by OpenSymmetry, which graciously allows us to reprint its vendor listing in this section.

OVERVIEW

The Sales Performance Management (SPM) market continues to grow. According to Gartner Research's 2019 Magic Quadrant for Sales Performance Management (SPM), the \$950 million SPM software market continues yearly growth of 13% and is expected to reach \$1.4 billion by 2022. SPM is a critical component of a sales organization's core enablement solutions because it provides the link between business strategy and selling behavior. The footprint of SPM is broadening from just compensating sales representatives to driving a more holistic approach. This includes sales talent acquisition through talent development, support for sales process, incentive design and administration, and the management of territories and quotas all in one solution. These integrated applications help enterprises improve the organization, direction and motivation of sales teams in order to achieve sustained improvements in growth and profitability.

With dozens of SPM solutions in the market, selecting the right solution or combination of solutions can be a complex and time-consuming task. The SPM Vendor Guide has been prepared by OpenSymmetry to introduce the leading suppliers of SPM systems and solutions.

As you read this guide, OpenSymmetry has four recommendations:

- Have a clear vision of the future state you desire to achieve. SPM technology is the enabler, but the design, process and approach need to be aligned.
- Automate incentive design in a way that will drive and reward the right behaviors from your sales team and modeled expected outcomes.
- Establish a realistic business case. It's not uncommon for organizations to have a robust platform that is much bigger than what is needed to achieve desired results.
- Have a rigorous selection process. This is a multiyear investment, requiring the right planning upfront.

The SPM software vendors included in this review were selected based on their customer base, corporate recognition and contribution to the field of SPM. Each has significant qualities within their services or software that should be reviewed when assessing the purchase of a solution.

Inclusion of vendors in this guide does not constitute endorsement or recommendation of any listed vendors. OpenSymmetry has not evaluated, pre-qualified or certified these vendors.

About OpenSymmetry

OpenSymmetry provides end-to-end sales performance management consulting services, from strategy work and data services to implementation and post-implementation services. With over 2 million payees enabled by OS solutions, OpenSymmetry is committed to creating the best possible user experience for sales technology solutions and enabling clients to become sustainable in terms of sales performance management, whether through operational self-sufficiency or through OS-managed systems.

Since 2004, OpenSymmetry has completed over 1,500 successful SPM projects for more than 500 clients ranging from SMBs to enterprise-level companies across four continents. Headquartered in Austin, Texas, OpenSymmetry has been recognized by Inc. as one of the 50 Best Workplaces in 2016 and 2017, and the Inc. 5000 Fastest Growing Private Companies in the U.S. for seven years in a row.

Disclosure Note: OpenSymmetry is an integration partner with the following software companies:

Anaplan	IBM	Oracle	SAP	Xactly
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Anaplan

Date Founded: 2006	Location: San Francisco	Phone: (415) 742-8199
Employees: 1,300+	Revenue: \$240M+	Web: anaplan.com

Anaplan (NYSE: PLAN) is pioneering the category of Connected Planning. Large and fast-growing global enterprises use the Anaplan solution to connect people, data and plans across the business, enabling real-time planning and decision-making in rapidly changing business environments. Anaplan was recognized by Gartner as a Leader in the 2019 Magic Quadrant for Sales Performance Management report for the third consecutive year.

Anaplan for Sales delivers a dynamic sales performance management (SPM) and sales effectiveness solution that empowers sales leaders to innovate the ways they sell. By connecting the entire sales strategy on a single platform, Anaplan gives sales leaders the power to anticipate market changes and act accordingly, while keeping sales objectives aligned to company goals. Leaders and executives can plan, predict and model the performance of the entire sales organization and improve alignment across teams of any size. Anaplan customers increase the value of their existing CRM systems by motivating the right sales behaviors, modeling future performance and optimizing sales activities across the enterprise. By coordinating these go-to-market processes on a single platform, Anaplan confers a unique competitive advantage that helps companies increase revenue, drive growth and confidently arm their sales teams, all while easily connecting with other enterprise systems.

Average # of Payees	Undisclosed
Primary Markets	Telecommunications, retail, pharmaceuticals, technology, CPG, manufacturing, insurance, oil and gas, financial services, life sciences
Delivery Model	SaaS
Total # of Participants	Undisclosed
Client Base	1000+
Managed Services	Yes
Training	Online classes/certification
Support	Live chat, email and phone
Pricing Model	Subscription-based, license per user
Technology	Patented HyperBlock architecture combines the best of relational, in-memory columnar, and cell-driven data models to deliver a powerful calculation engine in the cloud. The Anaplan platform integrates with enterprise systems including Salesforce, Informatica, MuleSoft, Dell Boomi, SnapLogic, Tableau and DocuSign

Sample Customers	DocuSign, HPE, Intel, Intuitive Surgical, Lexmark, McAfee, Motorola, Red Hat, Rogers Communications, Tableau, Telus, Tyco, VMware
Additional Offerings	Finance: strategic planning; budgeting and forecasting; operational planning; financial consolidation and corporate reporting. Supply chain: product portfolio management; demand planning; supply planning; sales and operations planning; strategic policy management.

IBM (IBM SPM/ICM)

Date Founded: 1911	Location: Armonk, NY	Phone: (914) 499-1900
Employees: 351,656	Revenue: \$79.59B (2018)	Web: ibm.biz/ibm_spm

IBM Sales Performance Management (SPM) continues to be positioned in the Leaders quadrant of the Gartner 2019 Magic Quadrant for Sales Performance Management. The solution is comprised with capabilities to help organizations improve sales performance and operations with better incentive compensation plan management and smarter sales territories and quota administration. Organizations gain faster insights with data discover and advanced analytics capabilities through IBM Watson (i.e., Artificial Intelligence (AI), Machine Learning (ML) and Natural Language Processing (NLP)).

IBM Sales Performance Management (SPM)—including incentive compensation management (ICM), and territory and quota management can be deployed as a SaaS or on-premise offering. Combined with IBM Planning Analytics functionality, organizations have a comprehensive solution for sales planning, sales management and sales analytics. ICMobile enables access to sales metrics and reports, on any mobile device, at any time.

IBM Incentive Compensation Management (ICM) is a highly scalable solution that enables companies to automate the process of calculating, reporting & analyzing variable-based pay. IBM ICM provides tools and information for sales reps—ensuring accuracy and efficiency. Managers and administrators can take control of their operations, eliminate surprises and make better strategic choices for their variable incentive programs.

IBM Incentive Compensation Management has proven capabilities for handling very large transaction volumes and compensation complexity. In 2018, the user interface (UI) was updated for both the administer and end-users and now offers premium performance options for large and complex model calculation that requires speed and flexibility. Product development includes a client-driven roadmap that is facilitated through IBM Design Thinking workshops—giving customers a voice to help shape the solution to include capabilities that are most important to them. This is a unique strategy that gives customers an interactive opportunity to work with and directly affect the future functionality of the product.

Average # of Payees	100 to 5,000+; largest customer has over 30,000 payees
Primary Markets	Banking, insurance, telecom, life sciences, retail, industrial and others
Delivery Model	SaaS or on premise, enterprise or mid-market

Total # of Participants	N/A
Client Base	N/A
Managed Services	Yes
Training	Online certification/classes, On-site training offerings
Support	Online and phone, worldwide
Pricing Model	For cloud: subscription pricing based on payees. For on premise: perpetual license fee based on payees, plus annual maintenance fee. For both: implementation fee based on statement of work
Technology	Uses Microsoft SQL database, C# and Java, Spark
Sample Customers	Facebook, T-Mobile, Sprint, Capital One, EarthLink, Getty Images, PayPal, Kohl's, Samsung, Elavon
Additional Offerings	IBM Watson (i.e., artificial intelligence (AI), machine learning (ML) and natural language processing (NLP), IBM Planning Analytics (for planning, scenario modeling & forecasting)

Iconixx

Date Founded: 2010

Location: Austin, TX

Phone: (877) 426-6499

Employees: 100+

Revenue: \$10M+

Web: iconixx.com

Iconixx offers an enterprise-class sales performance management solution enabling organizations to align their corporate strategy and planning with sales execution. Our highly configurable and scalable, cloud-based solution allows for improved operational efficiencies delivering commission payout accuracy with multiple currencies, plan modeling and optimization, quota and territory management, dependable forecasting, advanced analytics and regulatory compliance. Organizations are able to budget and plan more efficiently, increase sales productivity, improve overall profitability by automating, analyzing and optimizing commission and incentive processes with Iconixx.

Iconixx Sales™: A sales performance management (SPM) solution that makes it simple to design, configure and manage complex sales compensation plans. Iconixx Sales delivers value with: a native workflow engine, native territory management, pre-configured business rules and formulas library, configurable role-based dashboards, self-service analytical capabilities, compliance through a complete audit trail, accrual and forecasts of total incentive compensation expenses based upon historical trends with seasonality factors, and analysis of plan effectiveness with “what-if” modeling and payout forecasting.

The Iconixx ICM system can process the data set below in under one hour using a standard cloud production environment with no pre-processing, added costs or additional hardware for acceleration:

- 100,000 payees
- 20 million transactions
- 20 separate compensation plans
- 5 hierarchy levels of roll-up crediting
- 3 components per compensation plan
- 1 hour of less computation time
- 0 pre-processing, additional costs, extra hardware, errors or gimmicks

Iconixx Incentive™: An incentive compensation management (ICM) tool that easily manages complex quarterly and annual bonus programs, discretionary awards, MBOs and other variable incentive plans for the entire organization.

Iconixx Merit™: A solution to easily design, create and manage complex merit increase processes requiring workflow driven approvals and budget management.

Average # of Payees	100 to 100,000+
Primary Markets	Insurance, telecommunications, retail, technology, financial services, manufacturing, mortgage, life sciences, health care, communications, software
Delivery Model	SaaS
Total # of Participants	100,000+
Managed Services	Yes (internal team and partners)
Training	Classroom, virtual and on-site training for an Iconixx Compensation Administrator Certification
Support	Phone
Pricing Model	Subscription model (SaaS)
Technology	Cloud technology accessible through standard web browser
Sample Customers	Scholastic, Randstad, CBS, Datacolor, Raymond James, Phonak, Instrument Management Services, DISA Global, HUB International, Thule, WOW, Equipment Depot, First Bank, Bioventus
Additional Offerings	Business outsourcing services, technical support solutions, full business process outsourcing, expert services

Optimize

Date Founded: 2013	Location: Global with resources in the North America, EMEA and APAC	Phone: (484) 490-9090 (USA)
Employees: 320+	Revenue: \$70+ million	Web: optimize.com

Optimize transforms sales operations into a strategic competitive advantage—from improving individual business processes to building Centers of Excellence for sales operations management. Optimize enables sales improvements with a set of integrated, no-code, highly scalable cloud platforms that help sales organizations easily and quickly adapt to change—including platforms for sales performance management (including sales compensation, quotas, territories and objectives), sales data management (including data repository and ETL management), application development (including enterprise planning, and reporting and analytics). With enabling cloud platforms and hundreds of experts in sales operations and business process management, Optimize has built a solid track record of client success by enabling customers to:

- Deliver Rapid Impact
 - Optimize eliminates risks and accelerates time to value by including best-in-class apps, setup services, operational support and cloud services in one annual subscription fee
- Adapt to Change
 - Through ongoing engagement, Optimize provides strategic vision, helps companies continuously prioritize needs and enables them to rapidly adapt to change
- Expand as You Need
 - Optimize goes beyond sales compensation and sales performance management to improve all aspects of sales operations

Optimize was again named a leader in the Gartner 2019 Magic Quadrant for Sales Performance Management and achieved the highest score of all the vendors in each of the four Sales Performance Management (SPM) Use Cases in the Gartner 2019 Critical Capabilities for Sales Performance Management report. In addition, Optimize received perfect 5.0 scores for Data Transformation (ETL) and Audit processes and is referenced as the vendor providing the “best customer experience.”

Although its roots are in SPM, Optymyze has created a new market for sales operations management, rooted in our no-code data and end-user app development platforms—all part of one fully integrated solution. Companies looking for an SPM solution are often shopping for the wrong thing and missing out on the opportunity to make a bigger impact on their sales force productivity and sales effectiveness.

Average # of Payees	200 to over 100,000+
Primary Markets	Largest clients are in insurance, financial services, life sciences, banking, telecom, technology, manufacturing, distribution and retail; however, Optymyze serves all industries
Delivery Model	Cloud application deployments utilize AWS, with the associated global elasticity and scalability for both in-memory and batch processing
Pricing Model	Annual subscription fee includes setup services, operational support and cloud services
Technology	Browser-based, enterprise-scale cloud applications for managing sales operations. Platform as a service for building mobile apps for iOS and Android. Data repository integrates with Oracle, SAP, Salesforce, MS Dynamics and other ERP, CRM, HR, accounting, marketing, legacy systems and third-party data providers such as NIPR and IMS
Sample Customers	GE, McKesson, J&J, Office Depot, Alcon, Charter Communications, Zurich, Thomson Reuters, Charles Schwab, Cigna, Estee Lauder, PepsiCo, Sunovion, Sasktel, Desjardins (Canada), Maxis (Malaysia), and Telenet (Belgium)
Additional Offerings	In addition to core SPM solutions, Optymyze goes beyond sales performance management to improving any aspect of sales operations through its no-code data management and application development platforms.

Oracle

Date Founded: 1977	Location: Redwood Shores, CA	Phone: (800) 633-0738
Employees: 138,000+	Revenue: \$37.728B (2017)	Web: oracle.com

Oracle Corporation provides a range of tools for managing business data, supporting business operations and facilitating collaboration and application development.

Oracle Sales Performance Management (SPM), which includes robust incentive compensation capabilities, is a component of the Oracle Engagement Cloud service and provides an integrated suite of rich sales planning tools allowing sales executives, managers and operations staff to collaborate and quickly deploy effective sales, territory and quota plans. Additionally, Oracle Sales Planning for Engagement Cloud is available for customers that wish to tap into advanced planning capabilities that draw from historical financial actuals and use powerful planning methodologies to quickly and easily create plans based on even the most complex statistical projections, complex formulas and custom metrics. By aligning the company's business and sales strategy, Oracle SPM provides the means to motivate the sales organization to achieve their sales objectives. Oracle SPM streamlines the rollout of new plan initiatives ranging from simple to complex, provides productivity tools to reduce administrative costs, generates intelligence-based plans, and presents relevant business insights to drive sales performance.

Oracle SPM, including incentive compensation, enables organizations to define measurable business objectives (MBO's) and model their compensation plans that align with their business strategy and sales performance goals. Organizations can leverage the solution to motivate their own sales force, service teams, third-party representatives, customers/suppliers, resellers, partners or any other compensated party using various monetary and non-monetary rewards such as commission, bonus, SPIFs, prizes, leaderboards and more. Ensuring that sales reps are consistently and constantly informed, each sales rep has access to interactive sales performance reports with real-time information on their performance to quota, earnings to target incentive and objective achievements. Sales reps are presented their potential commission and attainment on each opportunity, ensuring they are working those opportunities that are aligned most closely with Sales Strategy. Sales Performance data is also available in real-time on the go by accessing the Mobile Commissions application on their mobile devices.

Oracle Sales Performance Management is available with multiple editions of Oracle Engagement Cloud, and is fully integrated with other Oracle CRM/ERP/HCM applications and other third-party systems. Oracle Sales Planning Cloud is available as a separate, advanced solution, which is designed to work seamlessly with Oracle Engagement Cloud and Oracle EPM Cloud.

Average # of Payees	1,000 to 100,000+
Primary Markets	High-tech/manufacturing, retail, financial services, telecommunications, automotive, health care/pharma sales and more
Delivery Model	SaaS
Total # of Participants	N/A
Client Base	N/A
Managed Services	Yes
Training	Online classes/on-site classes/certification
Support	Online and phone
Pricing Model	Per user per month
Technology	Oracle DB, OBIEE, Oracle Engagement Cloud, Oracle EPM Cloud, Oracle HCM Cloud
Sample Customers	Motorola, Avaya, Emirates NBD, General Electric, Mazda Motors, Australia Finance Group, Priceline, Symantec
Additional Offerings	Oracle offers hundreds of applications, ranging from its well-known database, to its suite of cloud application services, platform as a service and infrastructure as a service.

SAP

Date Founded: 1972	Location: Global	Phone: (866) 812-5244
Employees: 96,000+	Revenue: \$29.1B	Web: SAP.com

SAP is the market leader in enterprise application software, helping companies of all sizes and in all industries run at their best: 77% of the world's transaction revenue touches an SAP system. Our machine learning, Internet of Things (IoT) and advanced analytics technologies help turn customers' businesses into intelligent enterprises. Our end-to-end suite of applications and services enables our customers to operate profitably, adapt continuously and make a difference.

SAP Commissions (formerly CallidusCloud) delivers an end-to-end Sales Performance Management solution and has been recognized as a leader in the Gartner Magic Quadrant for Sales Performance Management for six consecutive years.

Average # of Payees	Not disclosed
Primary Markets	Financial services, high-tech, insurance, manufacturing, life sciences, telecommunications and more
Delivery Model	SaaS
Total # of Participants	Not disclosed
Client Base	Not disclosed
Managed Services	Yes
Training	E-learning, virtual instructor-led, on-site are available with classes and certifications
Support	Chat, phone, IM and email, to a designated technical support engineer
Pricing Model	Per payee per month
Technology	SAP Commissions runs on an SAP HANA Database Server with an Apache Tomcat application server. SAP Commissions, intelligent add-on extends core compensation functionality with territory and quota management and uses proprietary technology for embedded analytics and artificial intelligence. SAP Commissions integrates with SAP applications and all major 3rd party CRM, ERP and HR systems like Salesforce.com, Oracle/NetSuite, Microsoft, and Workday
Sample Customers	Verizon, EMC, ADT, Aetna, AXA, DirecTV, JPMorgan Chase, Lenovo, MetroPCS
Additional Offerings	SAP Sales Cloud provides a full suite of sales capabilities including CRM, Retail Execution, Pipeline Management, Configure Price Quote, Contract Lifecycle Management, Sales Enablement, Litmos Sales Training, Intelligent Sales Forecasting, Producer Lifecycle Management, Revenue Recognition, Subscription Billing, Entitlement Management, Data Mediation, Coaching and more.

Xactly

Date Founded: 2005

Location: San Jose, CA

Phone: (866) 469-2285

Employees: >600

Revenue: Privately Held,
not reported

Web: xactlycorp.com

Xactly unleashes the human potential of sales teams by dramatically improving their sales planning, territory optimization and incentive compensation processes. With its distinct cloud applications suite and unique empirical sales performance data set collected over 14 years, Xactly increases sales productivity and revenue growth. The value of our interconnected suite is captured in the user's ability to Plan, Execute and Optimize their sales performance management operations:

PLAN: Empowering companies with a data-driven approach ensuring optimally staffed sales organizations, equally distributed quotas, balanced territories and benchmarked comp plans to drive 15% increase in revenues, 20% improvement in productivity and 10% greater quota attainment

- Xactly Sales Planning—Eliminate guesswork from resource planning to hit sales targets and drive top-line growth using analytics and artificial intelligence (AI).
- Xactly Advanced Quota Planning—complex quota planning solution supporting account-based and decentralized quota planning to create fair and equitable quotas for the enterprise.
- Xactly AlignStar—territory design and planning software to visualize, analyze and optimize sales territories
- Xactly Benchmarking—Empower sales leaders to proactively monitor incentive compensation programs. Compare performance in teams both company and industry wide. Ensure incentive programs retain top performers, align sales behavior and reduce undesired rep attrition.

EXECUTE: Driving desired sales behaviors through tailor made incentives and compensation plans. Automating crediting and commission calculations driving error-free commission payouts, increase forecast accuracy to 99.6% and lowering error disputes to less than 0.5%. Seamlessly integrate and comply commission expense accounting with latest ASC 606/IFRS 15 revenue standards

- Xactly Incent, Xactly Express & Xactly SimplyComp—Drive sales behaviors with error-free incentive compensation, increase operational
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efficiencies and improve productivity with on-demand commissions visibility.

- **Xactly Commission Expense Accounting**—Manage your commission accounting process and ensure compliance under the new ASC 606 (IFRS 15) revenue recognition standard.
- **Xactly Objectives**—Drive performance and revenue by aligning employee behaviors with company goals through employee performance management software to assign and track MBO plans.

OPTIMIZE: Optimizing sales performance with near real-time data insights and leveraging true AI/ML to predict sales rep attrition to proactively retain top performing reps. Improving sales ramp and productivity to increase win rates by 15%.

- **Xactly Insights**—The Sales Performance Management (SPM) industry’s first-ever AI platform to provide the latest incentive compensation insights based on real pay and performance data to ensure competitive pay, effective plans and strategically aligned sales teams.
- **Xactly Connect**—Automate and streamline the critical flow of data across your entire sales performance management (SPM) suite with an open, standards-based data integration platform.

Average # of Payees	Varies by product, ranging from 10 to 10s of thousands of payees
Primary Markets	Manufacturing, retail, wholesale, business services, financial services, technology
Delivery Model	100% SaaS
Total # of Participants	Over 1,600 customers
Managed Services	Yes, through partners
Training	Online, at Xactly, or on-site classes
Support	Online, phone, specialist
Pricing Model	Per payee per month
Technology	True multi-tenant SaaS
Sample Customers	Salesforce, Viega, Workday, Cox Automotive, Hyatt, National Instruments, OpenText, Wood Maxkenzie, ServiceMax, SThree, Insperty, Docusign, Carestream, Cascade Orthopedic Supply
Additional Offerings	Xactly offers incentive compensation through Xactly Incent™, Xactly Express™ and Xactly SimpleComp™. The complete suite includes Xactly Sales Planning, Xactly Advanced Quota Planning, Xactly Alignstar, Xactly Benchmarking, Xactly Insights, Xactly Commission Expense Accounting, Xactly Objectives, and Xactly Connect.

Acquisitions

Xactly made two acquisitions in 2018. The first was Obero, a fast-growing sales performance management (SPM) company based in Canada. Obero has developed a number of key solutions, including rich sales planning and ASC 606/IFRS 15 capabilities that are now part of Xactly. The second was OpsPanda, which delivers an AI-based sales resource and capacity planning solution. With these two acquisitions, Xactly now delivers a continuous and end-to-end, data-driven sales planning solution within our market-leading sales performance management (SPM) portfolio.
