

# NO MORE IT DEPENDENCIES FOR ICM



## A DATA INTEGRATION CASE STUDY OF BLACKBAUD

### Industry:

Cloud/SaaS

### OS Service Lines:

Data Integration

Strategy & Services

### Technology Partner:

Xactly

**Blackbaud, a cloud software and services firm supporting social good organizations, has been a longtime Xactly incentive compensation customer.** Always ahead of the technology game, Blackbaud soon recognized that their setup of Xactly Incent™ needed improvement as it required manual exports to extract their sales performance data from Salesforce. They made the move to seek a solution to streamline their data extraction process.

## THE CHALLENGE

Blackbaud set up their incentive compensation management (ICM) system using Xactly Incent, which gave them high visibility into their sales team's performance. However, they were exporting data out of Salesforce at month end and importing it into Xactly. The key individuals driving business decisions could not get the data they needed in a timely manner and sales employees could not see their commission payments until well into the month following the sale.

## THE SOLUTION

Looking for options to automate the data extraction processes, Blackbaud turned to OpenSymmetry for a solution. With the knowledge that the Credit Assignment functionality for Xactly Connect™ was in beta, **OpenSymmetry presented a solution to move away from the Xactly DELTA process to Xactly Connect's Credit Assignment function.**

**Xactly Incent** is an incentive compensation management tool built specifically for enterprise. With Xactly Incent companies can ensure error-free compensation payments, increase operational efficiencies, and drive productivity with on-demand visibility into commission data.

**Xactly Connect** allows companies to automate and streamline the critical flow of data across the entire sales performance management (SPM) suite with an open, standards-based data integration platform.

For more information visit [xactlycorp.com](http://xactlycorp.com)

Because the functionality was just in beta and not fully released, the process for implementation took longer than expected. After careful consideration and coordination with the Blackbaud team, OpenSymmetry made a calculated decision to develop the solution with the beta functionality. The risk paid off, and OpenSymmetry was able to transition the work done in beta to the live functionality immediately after Xactly deployed it.

## THE RESULT

With Xactly Connect in place with the Credit Assignment functionality, **Blackbaud no longer needed to wait on a data extract but could now directly manage the integration logic through the Xactly Incent UI, without any additional software or license costs, bringing down program costs.** With some training, Blackbaud incentive compensation administrators could update and modify their integration processes as business requirements changed.

Additionally, Salesforce data was refreshed daily, with no middle step, giving the sales reps access to near real-time data.



You can see the results of our overnight refresh in the compensation the next day, rather than reps having to wait two weeks to see what's going on for their compensation. For me personally, I also don't have as much anxiety, especially when it gets closer to payroll time."

– Courtney Aubin,  
Senior Sales Commissions Analyst, Blackbaud



## OPENSYMMETRY'S DATA INTEGRATION STRATEGY & SERVICES

OpenSymmetry provides a full review, design, and implementation plan for an integrated, enterprise-wide data strategy for an SPM system. This includes connecting disparate data sources, extracting data, and cleansing data for more accurate and efficient processing and reporting.

**If you are interested in learning more about how OpenSymmetry Data Integration Strategy & Services can help you take control of and leverage your data as a valuable corporate asset, please visit us at [opensymmetry.com](https://opensymmetry.com).**

## ABOUT OPENSYMMETRY

OpenSymmetry is a global consulting company that specializes in the planning, implementation, and management of sales performance management (SPM) solutions supported by the industry's leading technology suppliers. Since 2004, OpenSymmetry has enabled its customers, ranging in size and industry, to achieve greater operational efficiency and get better sales results.

## ABOUT BLACKBAUD

Leading uniquely at the intersection point of technology and social good, Blackbaud provides cloud software, services, expertise, and data intelligence that empower and connect people to drive impact for social good. They serve the entire social good community, which includes nonprofits, foundations, corporations, education institutions, healthcare institutions, and the individual change agents who support them.

"Great team effort. We ran into hurdles, and OpenSymmetry helped us learn how to make it work."

– Alice Taylor, Finance  
Director of Compensation,  
Blackbaud

"After working together, my whole world changed. From working with a huge, onerous spreadsheet system, it's gotten simpler. It's changed the game for everyone in the company. We have improved time-lines for making information available for reps. It shifted my perspective to dig deeper into the data and the solutions Xactly Connect works with."

– Courtney Aubin, Senior  
Sales Commissions  
Analyst, Blackbaud