

HOW THE CO-OPERATORS GAINED CONFIDENCE TO SOLVE ANY SPM CHALLENGE



A CASE STUDY ON SALES PERFORMANCE MANAGEMENT OPTIMIZATION

Industry:
Insurance

OS Service Lines:
Deployment, Business Process Improvement, SPM Technology Optimization

THE CHALLENGE

The Co-operators, a leading insurance company based out of Guelph, Ontario, Canada, were using a legacy on-premise, custom built Sales Performance Management (SPM) system that no longer fit their sales compensation management needs as they grew. As they began to plan for the deployment of a best-in-class cloud-based SPM solution, they needed an SPM implementation partner with expertise in product and industry knowledge to ensure a well-planned, thorough implementation. By partnering with an SPM implementation expert, they would gain:

- **SPM AND PRODUCT EXPERTISE** for both the technology and the business process
- **LOWER BUDGET IMPACT** by avoiding high software vendor implementation fees
- **RELATIONAL CONTINUITY** with the same designated team
- **AN INDEPENDENT, UNBIASED PERSPECTIVE** on the solution configuration
- Help with **DEFINING AND SUPPORTING** the operational and administrative processes

A third-party SPM implementation partner also ensured The Co-operators that their configuration conversations would not be influenced by technology or software limitations. This also enabled them to focus on the business process and center conversations around driving the right technology configuration for the business rather than letting the software dictate the configuration.

Additionally, unlike software vendor support hours that focus on just the software and not the overall solution, and may provide different support consultants to fix specific software-related problems, a third-party SPM implementation partner would provide a consistent, designated team to oversee all support, not limited to the software. A designated team would have deep knowledge of The Co-operators business model, sales compensation processes, and team dynamic over time.

“ We were looking for an implementation partner with a lot of expertise, as well as the ability to see the solution from our business point of view, not the vendor’s perspective. OpenSymmetry met these criteria, and as we continued to work together, we were impressed by OpenSymmetry’s initiative to consistently ask what went well and what could have gone better.

– Venkat Reddy, Senior Information Technology Manager, The Co-operators

“ The OpenSymmetry team was friendly and easy to work with – I never experienced a lack of response or friction in the relationship. They came on site multiple times, and we were confident that they were keen to develop a deeper understanding of our business model to align their services.”

- Venkat Reddy
Senior Information
Technology Manager,
The Co-operators

THE SOLUTION

The Co-operators chose OpenSymmetry as their implementation partner, largely because of OpenSymmetry’s years of SPM expertise and deep product knowledge. Also, OpenSymmetry’s approach was focused on processes and how technology supports those processes—not the other way around. The three main goals for the implementation were to:



Configure and deploy
incentive plans,
processes, and
reports/dashboards



**Define operational/
support processes
and identify gaps**
in training and
documentation



**Provide the training
and knowledge transfer**
needed for the sales
compensation team to gain
operational self-sufficiency

OpenSymmetry and The Co-operators started with a **current state assessment & future state planning** project to help create a roadmap for how people, process, and technology would converge to enable an efficient SPM program. This project included:

- **MAPPING OUT ROLES AND RESPONSIBILITIES** for each system component and process
- **DEFINING A RACI MATRIX** for each operational task
- **IDENTIFYING GAPS IN TRAINING AND DOCUMENTATION** along with creating support documentation and operational guides
- **ESTABLISHING AND EXECUTING** a go-forward support plan

This operational plan encompassed the SPM system from pre-deployment to post-deployment, including the compensation process calendar, recurring transaction setup, data validation, triage process, adjustment process, training, and more. With over 20 years of automation and workflows built into the legacy system, organizing the operational processes was the key to a successful transition to a new SPM technology.

“ OpenSymmetry gave us greater confidence in approaching our new SPM tool and the challenges to come. The OpenSymmetry team would give us a heads up when changes that we wanted to make would be risky and needed more testing, or what kinds of changes would need to be configured outside of the tool and fed in. Product knowledge takes years to build, and we really leveraged the support we got from OpenSymmetry’s years of expertise.”

– Sheri Arndt, Senior Program Manager, The Co-operators

THE RESULTS

Through comprehensive planning, configuration, testing, and documentation, the deployment of The Co-operators' new SPM technology was a success. OpenSymmetry's support in establishing well-defined operational and support processes positioned The Co-operators team to successfully run and maintain an effective SPM program that meets their short-term and long-term needs. While OpenSymmetry enabled total self-sufficiency for The Co-operators team, they also provided peace of mind that OpenSymmetry is invested in their future success and always standing by to help and support them with technology and administrative needs.

To learn more about how OpenSymmetry has helped other companies like The Co-operators, please visit our Resource Center for more case studies:

<https://www.opensymmetry.com/resources>.

ABOUT THE CO-OPERATORS

The Co-operators Group Limited is a leading Canadian multi-line insurance and financial services co-operative with \$47.3 billion in assets under management. Their subsidiary companies provide solutions in four core areas: property and casualty (P&C) insurance, life insurance, institutional asset management and brokerage operations. They are supported by 6,249 employees and a dedicated financial advisor network with 2,530 licensed insurance representatives throughout Canada. They also serve 241 credit unions with more than 5.8 million members. For more information, visit www.cooperators.ca.

ABOUT OPENSYMMETRY

OpenSymmetry is a global consulting company that specializes in the planning, implementation, and optimization 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. For more information, visit www.opensymmetry.com.