

MORE COMMISSIONS TRANSPARENCY, MORE SALES TEAM CONFIDENCE



AN ICM IMPLEMENTATION CASE STUDY OF PACIFIC UNION

Industry:

Financial Services

OS Service Lines:

Deployment Services
& Methodology

Technology Partner:

CallidusCloud
(now SAP Sales Cloud)

THE CHALLENGE

When Pacific Union found themselves in a growth stage, they recognized an opportunity to improve their incentive compensation management (ICM) system. **With a team of around 300 salespeople, they needed a system that could scale up for a larger team.**

Pacific Union's prior ICM system was partially manual, meaning that it lacked transparency of important sales performance information. The sales team was frustrated because they did not have access to their daily sales performance results. Only managers had access to the Excel spreadsheets that held key sales performance information, and the information was not always communicated to the rest of the team in a timely way. This resulted in an erosion of trust among the sales team as they did not have confidence in the accuracy of the sales compensation calculations in the spreadsheets. **Because of this lack of confidence in the calculations and a general misunderstanding of how they were compensated, turnover among the sales team was high.**



The part of the Pacific Union ICM system that was automated produced the numbers for sales compensation from the back end, but **the operations team was frustrated that they could not easily make the changes needed within the ICM system.** It was difficult to keep track of all data, including adjustments, and get

ABOUT PACIFIC UNION

Pacific Union Financial, LLC is a full-service mortgage company located in Irving, Texas, with fulfillment centers in Texas, Arizona and California and branches across the country. They originate and purchase residential mortgage loans through Wholesale, Correspondent and Retail channels in addition to servicing a \$26 Billion portfolio. Pacific Union Financial offers white glove service for borrowers with best to bruised credit.

all the information they needed from the finance and accounting teams in a reliable and timely way.



Due to these factors, Pacific Union was ready for a change to their ICM system and process.

THE SOLUTION

Working together with OpenSymmetry, **Pacific Union decided to implement CallidusCloud (now SAP Sales Cloud) as their new ICM technology platform.** The reporting and analytics capabilities would drive positive behavior among the sales team and revive confidence and motivation through increased visibility and transparency for the whole team. Additionally, CallidusCloud's enterprise workflow would provide greater self-service capabilities for the field and provide systematic tracking of compensation-related information in one place. Standard workflows would allow the sales reps' inquiries to be reviewed and resolved with both managers and compensation administrators, as well as the routing of plan documents for review and approval. Pacific Union would also utilize workflows to route payroll information to the appropriate executives for approval prior to payment.

OpenSymmetry also created an operations guide so that Pacific Union compensation managers could administer their new ICM tool accurately without third-party support, giving them a high level of self-sufficiency for ICM program management. This operations guide provided process documentation so that new hires would be able to learn the system quickly without as much ramp-up time.

“ Now on payday, it's quiet! We don't get as many phone calls and emails with questions – instead, the sales team asks questions before payday and the reps are now confident about how they get paid. ”

– Tamara Cothran,
Commissions Manager,
Pacific Union

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.

THE RESULT

The CallidusCloud implementation went smoothly and brought the following benefits:

- **Higher visibility and transparency:** Sales performance dashboards allow the sales reps to see their commissions and pay information on a daily basis, rather than receiving a statement through email once a month.
- **Cleaner workflows:** With greater validation capabilities, the operations team is able to enter data and respond to requests all in one place, rather than through email.
- **More reliable data:** The operations team is able to receive, update, and present data more quickly and in a timely manner so that each payout period is less chaotic and more controlled.
- **Process self-sufficiency:** With the CallidusCloud (now SAP Sales Cloud) system, the operations team can now make plan changes easily and without relying on a third party, thereby reducing the operational costs of ICM management.
- **Lower turnover:** The sales team has confidence in the accuracy of their payments and the calculation logic used to get to the final numbers, producing lower turnover and higher employee satisfaction.

As Pacific Union continues to grow, the new CallidusCloud (now SAP Sales Cloud) ICM system allows them to scale their commissions processing in a way that is organized, transparent, and easy to understand.

If you're interested to learn more about how OpenSymmetry can help you take control of and get the most from your ICM solution, please email us at os_info@opensymmetry.com.