

opensymmetry

2023 SPM VENDOR GUIDE

THE FIRST STEP TO KNOWING WHO THE PLAYERS ARE



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SPM VENDOR GUIDE OVERVIEW

Evaluating, implementing, and adopting a new technology is a daunting task with numerous challenges along the way. It takes a cross-functional group's dedicated time, allocated resources, and expertise to ensure a solution is seamlessly implemented along with efficiently managing it over time.

The needs of every organization are different and are dependent upon internal and external data sources. Tying together sales strategy, technology, and execution requires a holistic view into the company's business strategy. These are just some considerations that must be made when evaluating sales performance management (SPM) technologies.

This guide is an introduction to some of the leading suppliers of SPM technology solutions. Included with the vendor submissions, our SPM technology experts have provided OS Insights to consider for Vendor Selection and Deployment to help guide your understanding of the platform. We recognize that every client is unique and should evaluate each technology with their distinct needs in mind.

Disclaimer: OpenSymmetry offered participation in this guide to all the vendors in the market. Inclusion in this guide are the vendors who chose to participate freely. We do not endorse any one company over another, and we do not certify these vendors in any way. OpenSymmetry is an authorized integration partner and/or maintains service integration practices with the following SPM software companies: Anaplan, beqom, CaptivateIQ, NICE, Performio, QCommission, Sales Cookie, SAP, SPIFF, Varicent, and Xactly.



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Anaplan

**DATE FOUNDED**

2006

**EMPLOYEES**

1,900+

**PHONE**

415-742-8199

**LOCATIONS**

San Francisco, CA

**REVENUE**

\$592M+

**WEBSITE**

anaplan.com

Global enterprises use Anaplan's solutions to design their go-to-market strategy, streamline sales performance and drive revenue growth. Anaplan has been positioned as Leader for Sales Performance Management (SPM) by Gartner consecutively for five years, a leader in the Ventana Sales Performance Management Value Index, #1 in the Dresner Wisdom of the Crowds for Sales Performance Management and more. Anaplan for Sales delivers core capabilities across sales planning, sales incentives, and sales insights. Anaplan enables business leaders to navigate the need for rapid scenario-based planning and the urgency around pivoting, course correcting, and transforming their revenue objectives amid market disruptions. Delivered on a single code base platform with a real-time calculation and scenario planning engine, Anaplan connects your go-to-market strategy with your financial plans, workforce strategies, marketing operations, revenue plans, and end-to-end supply chain processes, through their Connected Planning offering.

of SPM Customers: Anaplan has over 1,900 customers worldwide

Hosted vs On-premise: Cloud-native, SaaS

Pricing Model: Subscription-based, license per user

Training: Online classes/Certification

Support: Live chat, email, and phone

Average # of Payees Per Client: 2,000 to 10,000

SPM Products/Solutions: Sales Planning: Market Segment, Account Segmentation and Scoring, Territory Planning, Quota Modeling, Sales Capacity Planning; Sales Incentives and Rewards: Sales Crediting & Attribution, Commission, Bonus programs, Compensation Budgeting, A/B Plan Modeling, Adjustments & Clawbacks; Sales Forecasting: Pipeline Optimization, Commit Input & Forecast Modeling, Omnichannel Forecasting, and FP&A Revenue Planning

Primary Industries: Business Services, Consumer Goods, Financial Services and Insurance, Healthcare and Life Sciences, Industrial and Manufacturing, Media and Telecommunications, Retail, Technology, Communications, Travel, and Hospitality

Client Base: Anaplan various segments worldwide

Sample Customers: HP, Zillow, LegalZoom, Cox Automotive, DocuSign, VMWare, Tableau, Hitachi Automotive, Amer Sports, Telus

Technology: Anaplan's patented Hyperblock® technology powers an in-memory calculation engine, with multi-dimensional scenario modeling designed to produce ultra-fast calculations at scale, that enables customers to anticipate change, pivot quickly, and make more informed business decisions faster.

Integration with Other Systems: Anaplan's flexible architecture and expansive network of integration capabilities gives businesses the ability to integrate with transactional systems. With Anaplan CloudWorks native integration framework, customers can integrate with a variety of internal and external third-party data sources. Anaplan offers its REST APIs to allow Anaplan actions and services to easily interoperate with Anaplan Connect, ETL/ESB connectors, and custom integrations, providing direct access to underlying objects in Anaplan models. In addition, Anaplan provides a host of connectors to third-party systems including MuleSoft, Informatica Cloud, Dell Boomi, OneCloud, SnapLogic, DocuSign, Workiva, Tableau, and Microsoft Power BI.

Established Implementation Partner Network: Anaplan's global strategic partners include Adobe, Accenture, Deloitte, EY, McKinsey, Bain & Company, Wipro, and others. For a complete list of regional/specialty implementation partners, visit anaplan.com/partners.

Machine Learning/AI Capabilities: Anaplan's AI and machine learning capabilities include: Optimizer, an advanced algorithm with linear programming optimization engine that helps businesses determine the best path forward. Predictive Insights, a proprietary AI technology that gathers external, third-party predictive attributes on buyer intent data, and provides insights on where to focus resources based on segments propensity to buy. PlanIQ, an intelligence framework with advanced capabilities for predictive forecasting and continuous, agile scenario modeling by using native and third-party ML engines, including Amazon Forecast, to deliver highly accurate forecasts.

Additional Offerings: Anaplan for Finance: Revenue & OpEx Planning, Long Range Planning, Income Statement Forecasting, CapEx Planning, Balance Sheet and Cash Flow; Anaplan for Supply Chain: Sales & Operations Planning, Supply Planning, Supplier Collaboration, Pricing & Promotions, Demand Balancing, Anaplan for Human Resources: Workforce Planning, Compensation Modeling, Talent Strategy



OS INSIGHTS

VENDOR SELECTION & DEPLOYMENT CONSIDERATIONS

In our Anaplan review, we see a strong ability to integrate territory planning and quota management into the compensation solution providing a seamless deployment. Anaplan allows for unique needs-based configuration, robust configurable reporting, and a strong online community to support the product and its releases.



DATE FOUNDED

2009



EMPLOYEES

150+



PHONE

203-828-1072



LOCATIONS

New York, NY
Nyon, Switzerland



REVENUE

Not Disclosed



WEBSITE

beqom.com

beqom provides an end-to-end cloud-based sales performance management solution, combined with a total compensation solution, giving sales management the ability to implement effective sales strategies and tailor holistic rewards programs across the global salesforce, to keep all sales teams performing at top capacity.

beqom's highly configurable and scalable solution supports each company's unique data model and compensation strategy without compromise. beqom's Data Hub makes it easy to connect to other systems and consume new data sources as needed to support metrics-driven compensation plans and to adapt quickly as needs and strategies change.

100% in the hands of sales compensation teams rather than IT, beqom is easy and fast to change, enabling sales organizations to adapt quickly to market conditions and opportunities. With the ability to support distributed local compensation administration, with central control, beqom enables regionalized sales processes, helping companies to be most effective in local markets across geographies.

With advanced modeling, simulation, and analytics capabilities, sales management can confidently optimize territories, quotas, and sales incentive plans to deliver top results. beqom's predictive analytics helps companies identify at risk employees, make data-driven recommendations, and automate the process of ensuring effective, fair, and compliant pay practices.

By combining the capabilities of HR compensation management with robust sales performance management, beqom empowers sales management with the tools needed to create efficient and motivated teams. Leveraging capabilities like headcount planning, individualized compensation planning, and fair pay analysis, beqom provides sales managers with a unique ability to meet the needs of today's changing workforce, and to attract, motivate and retain the best talent.

of SPM Customers: 120+

Hosted vs On-premise: Large enterprise SaaS (cloud-based with support for unique data models)

Pricing Model: SaaS subscription pricing based on # of payees

Training: In-person and virtual

Support: Phone and online, worldwide; various SLA's, up to 24/7/365 premium support

Average # of Payees Per Client: 20,000

SPM Products/Solutions: Incentive Compensation Management, Territory Management, Quota Management, Sales Crediting, Simulation, Channel Management, Planning, Budgeting & Forecasting, Analytics & Reporting, Total Compensation Management, Continuous Performance Management

Primary Industries: Financial Services, High Tech, Telecommunications, Healthcare, Retail, Manufacturing/Automotive, Energy/Utilities, Food & Beverage, Business Services, Agriculture

Client Base: Large global enterprises with users in over 160 countries

Sample Customers: PepsiCo, Fujitsu, Lowe's, Mercedes-Benz, Syngenta

Technology: Microsoft Azure Cloud; includes a robust crediting and calculation engine, machine learning, workflow management, and advanced analytics.

Integration with Other Systems: beqom Data Hub provides integration packages or pre-built connectors for CRM, HCM, Finance, and most other systems.

Established Implementation Partner Network: Over a dozen global implementation partners, from big 4 accounting firms to boutique specialty consultancies.

Machine Learning/AI Capabilities: The beqom calculation engine, along with Microsoft Azure Machine Learning services, provides AI functionality to recognize patterns, predict performance, and optimize compensation models.

Additional Offerings: beqom partners with Our Tandem to provide continuous performance management and coaching capabilities. Please visit www.beqom.com for information related to all current offerings and solutions.



OS INSIGHTS VENDOR SELECTION & DEPLOYMENT CONSIDERATIONS

Our review has shown advanced analytics with Microsoft's Power BI and Azure Machine Learning along with the capability of processing high volumes of data. Configuration has improved with libraries of functions, preview capabilities and 'where used' features. The solution also has straightforward mobile configuration and support.

CaptivateIQ

**DATE FOUNDED**

2017

**EMPLOYEES**

90+

**PHONE**

N/A

**LOCATIONS**

San Francisco, CA

**REVENUE**

\$63M

**WEBSITE**

captivateiq.com

CaptivateIQ is a software company headquartered in San Francisco, California specializing in compensation management to ensure commissionable teams are aligned and properly incentivized to help grow your business. Their SPM solution allows integration from a variety of data sources, so that companies can streamline the manual process of data gathering and processing. Business users can design any commission plan without code, customize territories and quotas, and watch the changes in real-time. CaptivateIQ's technology takes sales compensation out of the IT organization and gives control back to business users, who can access performance data to motivate sales teams and drive real ROI in the compensation program.

of SPM Customers: 1400+

Hosted vs On-premise: SaaS

Pricing Model: Annual subscription based on number of payees

Training: Onboarding and training provided regularly online

Support: Live chat, email, and phone

Average # of Payees Per Client: 120-500

SPM Products/Solutions: Incentive Compensation Management, Sales Capacity Planning, and Reporting

Primary Industries: Computer Software, Business Services, Financial Services, Healthcare, Manufacturing

Client Base: CaptivateIQ services customers around the world, providing innovative commissions solutions to SMB, Mid-Market, and Enterprise companies.

Sample Customers: Aptean, Dynata, Udemy, Intercom, Instructure, and Gong

Technology: CaptivateIQ's sales commission platform facilitates the calculation, reporting, and payment of sales commissions. The sales commission platform runs on AWS infrastructure.

CaptivateIQ

Integration with Other Systems: CaptivateIQ's SPM solution integrates with dozens of data sources including Salesforce, Microsoft Dynamics, Workday, BambooHR, NetSuite, Intacct, Stripe, QuickBooks, Snowflake, Amazon Redshift, SQL databases, and SFTP.

Established Implementation Partner Network: Yes; 15+ implementation partners globally, including OpenSymmetry, Lanshore, and SpectrumTek.

Machine Learning/AI Capabilities: CaptivateIQ's innovative technology can enable organizations to leverage advanced analytics and capture Motivational Intelligence across the sales team.

Additional Offerings: Please visit www.captivateiq.com for information related to all current offerings and solutions.



OS INSIGHTS

VENDOR SELECTION & DEPLOYMENT CONSIDERATIONS

The review of CaptivateIQ supports a business and payee-friendly UI, flexibility in the configuration of plans with customizable reports and individual views. CaptivateIQ provides easy out-of-the-box connectors via the UI for configuration resulting in less IT involvement in your implementation. The review also found flexible administrative tools for reporting, dashboards and statements that ease the implementation process and provide visibility and transparency for reps.

**DATE FOUNDED**

1986

**EMPLOYEES**

6,500

**PHONE**

551-256-5000

**LOCATIONS**

Hoboken, NJ

**REVENUE**

1.648B (2020)

**WEBSITE**

nice.com/spm

NICE SPM helps large sales organizations automate the most difficult workstreams of the sales incentive process. This includes three key elements of sales compensation:

- **Handling Complexity** - NICE SPM provides the tools and automation for simplifying the management of complex incentive processes and logic, sales crediting, data integrations, payee hierarchies, workflows, reporting and analytics.
- **Scalability and Growth**: NICE SPM rapidly processes millions of sales transactions within minutes, supporting business-critical needs and growth. The solution can autonomously determine sales credits, calculate incentive payments and perform retroactive adjustments, as well as support real-time reporting, compensation plan design, multiple currencies and many languages.
- **Self-sufficiency**: With NICE SPM, compensation administrators can independently perform all tasks and manage changes without the need for IT, coding or professional services. From plan design, through sales credit troubleshooting, to customizing reports and analytical dashboards, administrators are self-sufficient and have greater control over their system.

of SPM Customers: Undisclosed

Hosted vs On-premise: SaaS, hosted, or on-premises

Pricing Model: For SaaS: tiered per-user model, subscription-based. For on-premises: tiered per-user model, initial license fee + annual maintenance. No additional hidden fees for storage capacity, transactions volumes, calculation runs, etc.

Training: On-site instructor-led classes or virtual

Support: Support portal, email and phone

Average # of Payees Per Client: 5000

SPM Products/Solutions: Quota and Territory Management, Compensation Design & Sales Crediting, Incentive Compensation Management, Performance Analytics

Primary Industries: Financial Services, Banking, Manufacturing, Consumer Goods, Healthcare, Retail, Business Services, Telecommunications, Hospitality

Client Base: Undisclosed

Sample Customers: Apple, Royal Bank of Canada, Shaw Industries, Lexis Nexis, Charles Schwab

Technology: NICE SPM uses several technologies to address performance, data integration, analytics, and reporting. Rapid processing of large transaction volumes, crediting, and calculations is achieved using several technologies:

- Incremental recalculation technology automatically responds to changes by recalculating only those payees and plans affected.
- Big data design combines RDBMS flexibility with NoSQL scalability. Calculations are divided into individual jobs and submitted to calculation grid, where all calculations done in memory. Performance determined by CPU and Disk IO and avoid DB bottleneck by adoption of HDFS principles including write only calculations, ledger archived, and sharing of key tables.
- Horizontal scaling dynamically shares workload processing across available hardware resources. Linear scalability is achieved by an elastic calculation grid that can be used for any data processing.

Proprietary Data Ports technology supports the efficient loading data from enterprise systems (like SFDC, SAP, Workday), Excel sheets, flat files, or others. Business users can apply data transformations, map fields, and schedule imports, with no need for programming skills or understanding the underlying data models.

NICE SPM includes embedded analytics and reporting from BI top market leader MicroStrategy. Users can quickly deploy consumer-grade BI experiences for every role, on any device, with sub-second response at enterprise scale.

Integration with Other Systems: NICE SPM provides out-of-the box integration with CRM, ERP and HR systems like Salesforce, Workday, Oracle, SAP and others, as well as customizable data ports for integrating with any homegrown system, Excel, or flat file.

Established Implementation Partner Network: N/A

Machine Learning/AI Capabilities: Predictive and prescriptive analytics solutions form part of the overall NICE technology platform portfolio, which include a suite of Artificial Intelligence, Machine Learning, and NLP technologies. Capabilities include causality analysis, correlation engines & explanation models, trend analysis, predictive analytics (reinforcement learning), path analysis, and anomaly detection.

Additional Offerings: A dedicated solution, NICE Pay for Performance, allows large contact centers to manage variable pay for agents based on service and sales oriented KPIs.



OS INSIGHTS

VENDOR SELECTION & DEPLOYMENT CONSIDERATIONS

Our review of NICE continues to show performance, ease of integration with multiple sources, complex crediting and reporting are key areas of support within the application. The new crediting module allows for easier configuration and variations in support along with continued improvements in analytics and reporting.

**DATE FOUNDED**

2006

**EMPLOYEES**

125+

**PHONE**

833-817-7084

**LOCATIONS**

Newport Beach, CA

**REVENUE**

Not Disclosed

**WEBSITE**

performio.com

Performio is an Incentive Compensation Management provider that drives business performance with a product built to handle complexity, a team of dedicated experts, and a proven track record of long-term global success. Performio is a modern, enterprise-grade software and mobile app used to manage and automate incentive compensation. Performio addresses complexity through no-code architecture, native data transformation capabilities, purpose-built plan components, and automated workflows. Performio provides experts who will guide you as you adapt your incentive compensation program as your business changes, presenting a reliable, focused, and safe partner who has delivered customer success for over 15 years.

Over the last year, improvements to Performio's solution have included powerful new admin navigation and advanced reporting capabilities, with embedded BI, to help customers gain insights from their compensation and sales performance data. Other product enhancements include the addition of aggregate reporting, DocuSign integration, and general UX enhancements for ease of use. Performio offers two fixed price implementation packages, Starter and Standard, expert-led implementations designed to meet the needs of your business.

of SPM Customers: 100s

Hosted vs On-premise: SaaS, multi-tenant / single-tenant / VPC

Pricing Model: Per user annual license fee

Training: Hands-on training, as well as an online support hub for technical training and support with experts

Support: Email, phone, mobile app, and online portal

Average # of Payees Per Client: 250 in Midmarket accounts, 2,500 in Enterprise accounts

SPM Products/Solutions: Incentive Compensation Management, Native data transformation capabilities, no-code plan components, comprehensive report builder, API, Commission Overrides, complex crediting, Dispute resolution and commission approval workflows, audit log, scheduler, task manager, in-app messaging, Dashboards, Forecasting

Primary Industries: Banking, Business Services, Distribution, Financial Services, Manufacturing, Media & Advertising, Medical Device, Software, and Telecommunications

Client Base: Midmarket, and Enterprise across North America, EMEA, and APAC

Sample Customers: Abbott Labs, Atlantic Broadband, Boehringer Ingelheim, ChargePoint, Clear Channel, Contentful, Cybereason, Dräger, Eastern Industrial, E2Open, Fuji Xerox, Johnson & Johnson, Nexstar Media Group, OnDeck, Optus, Service Express, Tech Data, Toll Brothers, Veeva, Vodafone, Wedbush Securities, WestPac and WP Engine

Technology: MySQL, React, Java hosted on AWS

Integration with Other Systems: Performio's ICM has an open systems approach that allows companies to natively integrate with Salesforce, NetSuite, and any other systems using REST API. Data transformation takes place in Performio; no data preprocessing is required.

Established Implementation Partner Network: Yes, Workcentive in Toronto and OpenSymmetry.

Machine Learning/AI Capabilities: Yes

Additional Offerings: Dedicated Database, Virtual Product Clusters, Sandbox, Managed Services



OS INSIGHTS

VENDOR SELECTION & DEPLOYMENT CONSIDERATIONS

Through our review of Performio, we have seen the ease of use and end-user interfaces for configuration resulting in significantly less IT involvement in your implementation. Transferability of skill is a big driver in this product. Performio also supports multiple areas of compensation including objective management and cash and non-cash total rewards. Performio's focus on ease of configuration and use continues while providing robust functionality.

QCommission

Pay People Properly



DATE FOUNDED

2004



EMPLOYEES

90



PHONE

650-242-0008



LOCATIONS

Half Moon Bay, CA



REVENUE

Not Disclosed



WEBSITE

qcommission.com
cellarstone.com

QCommission is a powerful, flexible sales commission software. It calculates your salespeople's compensation accurately and reduces errors related to spreadsheets and manual methods. It allows you to calculate commissions as soon as the commission period is over and saves a lot of time. It can communicate calculated commissions in a detailed and clear manner.

QCommission allows the compensation administrator to establish payees, products, customers, plans, incentives, quotas, payment frequency, etc., in the system. It allows the establishment of crediting and calculation rules for various incentives. It helps to enter or import performance transaction into the system and calculate incentives as frequently as necessary.

of SPM Customers: 1,800

Hosted vs On-premise: 1,760 SaaS, 40 On-Premise

Pricing Model: Per user annual license fee, Tiered user pricing

Training: On-line - Standard, On-Line customer specific for each implementation

Support: 24x7 Phone, Live chat, email, knowledge base & community portal

Average # of Payees Per Client: Median Average is 75. We have a wide range of implementation from small to relatively large.

SPM Products/Solutions: Sales Planning, Quota and Territory Management, Plan Design, Incentive Compensation, Forecasting, Dashboards, Modeling & Analytics. Majority of customers use Incentive Compensation, Reporting & Analytics.

Primary Industries: Accounting, Banking, Construction, Consulting, Education, Energy, Finance, Furniture, Healthcare, Insurance, Interior Design, Investment Management, Legal, Logistics, Mortgage, Manufacturer Rep, Manufacturing, Marketing, Media, Mortgage, Packaging, Pharmaceutical, Printing, Promotional, Real Estate, Reseller, Risk Management, Services, Software, Staffing, Technology, Telecom. They have 38 vertical solutions; the full list can be found at qcommission.com/Industry.

QCommission

Pay People Properly

Client Base: 2,400 for all CellarStone products of which 1,800 are SPM customers, with an additional 600 from out other products, QXchange (integration tool), MAXCustomer (CRM tool) and others. Project Management, Product support, these are related software tools which are all built on the MAX development platform.

Sample Customers: John Hancock, Village Copiers, GK Advisors, SetPlex, Duco Technology

Technology: Oracle & Microsoft Azure for the core infrastructure, MaxBlock as the IDE

Integration with Other Systems: QCommission integrates with 50 different enterprise systems including Salesforce, Intuit QuickBooks, Microsoft Dynamics CRM, Xero, Magento, Sage 500 ERP, Oracle Netsuite, Oracle EBS.

Established Implementation Partner Network: Undisclosed

Machine Learning/AI Capabilities: Reporting and Analytics

Additional Offerings: QExchange, an ELT tool specific for integrating source systems (Participants data and transactional data, such as Invoice, Orders Receivables and Gross Profit data) into QCommission & Out to Payroll, Accounts Payable and General Ledger systems. MaxCustomer, a CRM system, Max Agreement, a contract management system, MaxBlock a Paas system, MaxKudos, a non-cash reward system. Easy Commission, a commission tool for 1 to 5 participants.



OS INSIGHTS

VENDOR SELECTION & DEPLOYMENT CONSIDERATIONS

The review of QCommission found that it is fully integrated with Salesforce.com CRM and the latest release Lightning Ready, as well as accounting systems such as QuickBooks. The solution supports the ability to pay commissions on multiple varied frequencies in an easy-to-use interface. Administration can access help features online or using Quick Help functionality. QCommission also has a notable strong customer service team in place.

Sales Cookie



DATE FOUNDED

2018



EMPLOYEES

Not Disclosed



PHONE

425-891-3799



LOCATIONS

Bellevue, WA



REVENUE

Not Disclosed



WEBSITE

salescookie.com

Sales Cookie is a modern and intelligent platform designed to:

- Eliminate manual generation of commission spreadsheets
- Increase commission agility
- Improve commission accuracy / avoid costly mistakes
- Deliver commission reporting across all payees
- Increase transparency and motivate payees
- Provide managers with visibility on sales performance
- Deliver accounting (ASC 606) & legal compliance
- Track all commission "facts" in a data repository
- Provide real-time visibility on commissions

Sales commissions can be quite complex. Sales Cookie's focus is on extreme flexibility. Unlike most other solutions, they successfully automate 99% of commission structures - without compromise. All data can be accessed in real-time via tools such as Excel, Power BI, Tableau.

They offer unique features such as open data APIs, revenue analytics, payee surveys, data mining, or spend forecasting. Every aspect of the solution can be configured using powerful formulas and scripts (from crediting rules to custom attainment). All formulas look the same and use a common approach.

They process over two billion USD in sales. However, the best technology means nothing without supporting resources. Sales Cookie provides a knowledge base with 450 KBs, 120 video tutorials, a customized training program, and powerful management tools.

Sales Cookie has built next-generation intelligence in every aspect of their product - from detecting potential double-payments, to automatically retrieving exchange rates, or allowing you to visually track any change made to your configuration.

of SPM Customers: Private company, not reported

Hosted vs On-premise: SaaS

Pricing Model: Monthly subscription (usage-based); No contract – cancel anytime

Training: 1:1 online and via their site (450 KBs, 120 video tutorials, customized training program)

Support: Online meeting, email, dedicated number

Sales Cookie

Average # of Payees Per Client: 25 to 10,000+

SPM Products/Solutions: Plan Design, Incentive Compensation, Dashboards, Payee Surveys, Plan Terms & Conditions; Enquiry/ Dispute Management, Gamification, Forecasting, Modeling, Analytics

Primary Industries: Technology, SaaS, Insurance, Medical Devices, Pharmaceuticals, Outsourced Sales, Staffing & Coaching, Energy, Media

Client Base: Publicly traded companies, multi-nationals, PE-owned companies and SMBs

Sample Customers: Excellent references available upon request

Technology: Microsoft Azure Cloud, Open Data APIs (ex: OData, Web Hooks, etc.), Data pools and automated syncing across multiple data sources, Native sync with major CRM and Accounting systems, and Extreme flexibility (everything is a formula):

- Crediting logic
- Filtering logic
- Attainment logic
- Reward calculation logic

Integration with Other Systems:

- Hourly syncs with CRMs including Salesforce, Microsoft Dynamics, HubSpot
- Hourly syncs with Payment Systems including Quickbooks, Stripe, Xero, etc.
- Real-time integration with 3000+ application using Zapier and Tray.IO
- Reporting: Excel, Power BI, Tableau, etc., APIs: REST, OData, FTP, etc.

Established Implementation Partner Network: Yes, OpenSymmetry and others

Machine Learning/AI Capabilities: Revenue analytics, spend forecasting, trend analysis, root cause analysis, decision trees, intelligent behaviors (detect double payments, automate currency conversions, visualize plan differences, etc.)

Additional Offerings: N/A



OS INSIGHTS

VENDOR SELECTION & DEPLOYMENT CONSIDERATIONS

The review of Sales Cookie has shown a focus on Insurance and Technology sectors; however, the solution is suitable for other sectors as well. Sales Cookie maintains a business and sales representative-friendly UI, flexibility in the setup of plans with customizable reports and individual views. Real-time results and trace calculations enable quick and accurate configuration.

**DATE FOUNDED**

1972

**EMPLOYEES**

100,000+

**PHONE**

800-872-1727

**LOCATIONS**

Walldorf, Germany

**REVENUE**

\$30B+

**WEBSITE**

sap.com

SAP is a market leader in enterprise application software, helping companies of all sizes and in all industries run across many operational areas. SAP delivers their SPM offering to a range of buyers from midmarket to large enterprises with global deployments. The SPM solutions are designed to work with other customers' existing technology investments both SAP and otherwise.

of SPM Customers: SAP does not disclose the number of customers. They have approximately 12,000,000 active users across their SPM portfolio.

Hosted vs On-premise: SaaS

Pricing Model: Tiered User

Training: E-learning, virtual instructor-led, on-site are available with classes, and certification

Support: Live chat, email, and phone

Average # of Payees Per Client: 10,000

SPM Products/Solutions: SAP has a portfolio of SAP Sales Performance Management (SPM) solutions: SAP Commissions, SAP Territory and Quota, SAP Agent Performance Management, enterprise edition, SAP Agent Lifecycle Management, and SAP Agent Connection

Primary Industries: , Retail, Consumer Industries, Discrete Industries, Service Industries, High Tech, Insurance

Client Base: The Sales Performance Management portfolio's client base is 55% large enterprise and 45% in the mid-market. The portfolio has contracted customers in over 40 countries and users in 140 countries.

Sample Customers: Haven Life, Toyota, Aetna, Exide Life, MSC Industrial, Expedia, HD Supply, Maui Jim, Honeywell, BBVA Compass, Independence Blue Cross, BJ Wholesale, Mobile Mini, PetSmart, Lumen Technologies, Toyota, Endesa



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 SAP Territory and Quota and uses proprietary technology for embedded analytics and artificial intelligence.

Integration with Other Systems: SAP offers seamless integration with their hierarchy of hundreds of enterprise software, on cloud, legacy on-premises, and others.

Established Implementation Partner Network: The SPM portfolio has an established implementation partner network. A sample list includes: OpenSymmetry, Deloitte, Accenture, Ernst & Young, SpectrumTek

Machine Learning/AI Capabilities: SAP's SPM portfolio includes analytics with machine learning that increases operational efficiency and planning effectiveness, which in turn helps turn sales professionals into profitable contributors of the organization.

Additional Offerings: HR and People Engagement, Employee Experience Management, Business Technology Platform, ERP and Finance, Network and Spend Management, Supply Chain Management, CRM, and Customer Experience



OS INSIGHTS

VENDOR SELECTION & DEPLOYMENT CONSIDERATIONS

Through our review of SAP's solutions, SAP continues its commitment to and continues to improve the platform. SAP continues enhancing the out-of-the-box features and the core application. In addition, the system maintains its ease of use out-of-the-box and end-user configuration resulting in less IT involvement in your ongoing maintenance. SAP also continues to develop its other areas of support and administration capabilities including Territory and Quota and Agent Performance Management.

**DATE FOUNDED**

2018

**EMPLOYEES**

270

**PHONE**

385-287-0603

**LOCATIONS**

Sandy, UT

**REVENUE**

Not Disclosed

**WEBSITE**

spiff.com

Spiff is a leading sales compensation platform that automates commission calculations and motivates teams to drive top-line growth. With a combination of an intuitive UI, real-time visibility, and seamless integrations into current systems, Spiff is the first choice among high-growth businesses. The platform enables finance and sales operations teams to self-manage complex incentive compensation plans and provides transparency for sales teams.

Highlights:

- Provides a real-time commission portal, automated recommendations, personalized performance dashboards, events tracking, custom reporting, and more
- Connects with your CRM, ERP, payment processing, and payroll systems to extract data
- Gives real-time visibility into sales data to help you visualize trends across plans, teams, and the entire organization
- Decreases discrepancies caused by manual commissions management, provides real-time visibility and transparency into the commissions process, and drastically cuts down on the time it takes to prepare statements
- Users can easily meet regulatory requirements (ASC 606 and/or IFRS 15) with the customized reporting function. Finance teams no longer have to spend countless hours dredging through complicated commission sheets, with just a couple of clicks, relevant reports are populated instantly

of SPM Customers: 500

Hosted vs On-premise: 95% Hosted, 5% On-Premise

Pricing Model: Annual subscription model as well as one-time fees that include Implementation and Professional Services. They also offer a la carte pricing on add on features.

Training: Each customer has a dedicated Customer Success Manager that is the first point of contact with any question or concern. During implementation this CSM customizes training for all involved and helps facilitate training throughout the organization. Spiff also offers a help site and Spiff University to help facilitate continual learning.

Support: Spiff offers live chat, slack/team channels, ticketing, and direct phone support for our customers. They also have a comprehensive help site, University, and Spiff Community to provide additional support.



Average # of Payees Per Client: 300

SPM Products/Solutions: Quota and Territory Management, Plan Design, Incentive Compensation, Dashboards, Modeling, Analytics, Commission Expensing, Dispute Management, "What-if" Commission Scenarios, Comp Plan Distribution, Team Management, Custom Reporting, Benchmarking, Commission Estimator

Primary Industries: Software, Business Services, Retail, Construction, Consumer Goods, Entertainment, Financial Services, Healthcare, Media, Medical Devices, Pharmaceuticals, Public Sector, Retail, Technology, Telecommunications

Client Base: (SMB fast growing organizations with an ideal commissioned employee count of 20 or more reps), Mid-market, Enterprise, currently primarily North America, Australia, UK, Israel

Sample Customers: Qualtrics, Udemy, Outreach, Emburse, Qualys

Technology: Cloud Based Solution (hosted on Google Cloud) with custom option for On-Prem if necessary (ENT only), SQL Based Logic Engine with layers of enablement to feel like spreadsheets. Business Intelligence style reporting and dashboards available. Open API and intuitive GUI throughout the application.

Integration with Other Systems: Salesforce, Netsuite, Hubspot, RedShift, Workday, Stripe, Snowflake, Domo, Sage, Pipedrive, Slack, Webhooks, SQL Database, Workato IPaaS

Established Implementation Partner Network: Spiff has an in-house implementation team along with strategic implementation partners, including OpenSymmetry.

Machine Learning/AI Capabilities: Spiff Insights and Benchmarking allows users to compare their current compensation plans to the market as well as receive smart suggestions on potential changes and adjustments. In addition, the Commission Prediction trend card leverages machine learning to deploy a time-series model that uses past commissions to predict the total commissions for a given rep in the upcoming periods.

Additional Offerings: Spiff Commission Expensing, Spiff Analytics



OS INSIGHTS

VENDOR SELECTION & DEPLOYMENT CONSIDERATIONS

Our review demonstrated that Spiff has favorable capabilities to provide and ingest data easily from CRM tools along with other sources as it relates to data processing. Spiff's ease of business user configuration as well as transparency to reps and admins on the source of calculations and components provides a solid end user experience with timely updates and administration.



DATE FOUNDED
2005



EMPLOYEES
700+



PHONE
647-374-5501



LOCATIONS
Toronto, Canada



REVENUE
Not Disclosed



WEBSITE
varicent.com

Varicent is an award-winning SaaS company that helps businesses fuel growth. Their portfolio of solutions supports a company's entire go-to-market strategy, from sales plans that optimize sales investments and maximize market coverage to incentive programs that motivate sellers to deliver revenue objectives. Varicent's solutions include AI-driven insights to enable revenue leaders to set smarter goals, coach towards higher performance, and foster a winning culture. Managers and sellers are equipped with ideas to improve their execution and outdo previous performance.

of SPM Customers: 450+ clients with 3M+ users

Hosted vs On-premise: SaaS or On-premises

Pricing Model: SaaS subscription, license per user

Training: 100+ self-paced "how to" videos in addition to virtual and instructor-led courses

Support: Designated customer success manager as well as in-app documentation and chat. Clients also have access to high-value service offerings—free of charge—through the Varicent Advantage Program.

Average # of Payees Per Client: 150 to 1,000+

SPM Products/Solutions: **Varicent Incentive Compensation Management:** Guided Plan Design, Scenario Modeling, Plan Distribution and Management, Crediting, Rebates, Chargebacks, Adjustments, Compliance/Audit Reporting, Multi-Hierarch Team Management, People Dashboard, Inquiry Management, Ask Varicent Chatbot, Collaboration and Workflows, Reporting, AI-Driven Analytics, What-If Modeling. **Varicent Sales Planning:** Territory Planning and Management, Quota Planning and Management, Account Segmentation and Scoring, AI-Driven Analytics, Collaboration and Workflows

Primary Industries: Consumer Goods, Financial Services, Insurance, Media, Medical Devices, Retail, Technology, Telecommunications

Client Base: Enterprise and Mid-market

Sample Customers: Air Canada, Drift, Getty Images, The Home Depot, HughesNet, KPN, LendFlow, Manpower, Moody's, Pitney Bowes, Shopify, T Mobile, Unisys, Zions Bank

Technology: Incentive Compensation Management (ICM) enables clients to evolve beyond compensation math, payments, and ever-present issues. They are empowered to consider a broader range of factors that influence performance and maximize sales productivity like the contributors of attrition, testing the psychology of motivation, and improving service to internal customers. Clients use Varicent ICM to remove friction from the compensation process, freeing their resources to adapt quickly to market change and leverage their data to outdo their past performance. Sales Planning helps clients focus go-to-market resources on the right segments and customers to maximize return on investments and drive growth. Clients use Varicent Sales Planning to prioritize the right go-to-market plans to capitalize on market potential, pivot with insight to guide sales resources, uncover new market opportunities, and accelerate revenue growth with effective quotas and territories while minimizing the cost of sale. Varicent solutions are built on cloud-native infrastructure and industry-leading distributed computing platforms, such as Apache Spark, to deliver the most scalable and performant solutions to market. Solutions are deployed on AWS.

Integration with Other Systems: More than 20 pre-built CRM, database, eCommerce, and HCM data connectors, including Salesforce, Microsoft Dynamics, Workday, AgentSync, and Snowflake, along with a growing library of API-based integrations enable easy interaction with data from any number of disparate data sources, integrating that data directly into your organization's existing infrastructure.

Established Implementation Partner Network: OpenSymmetry, Accenture, Blue Horizons Group, Canidium, Datablue, Deloitte, Everis, Exsoinf, Fintech Path, Hexaware Technologies, IBM, InnoVyne, Intangent, Lanshore, McAlign, MTECHNE, Neitek, Neoris, Net Partners, Next Decision, NTT Data, Outliers, Polarys, Positive Thinking Company, Pronostica, PWC, RCI, Relanto, SalesGlobe, Sands Partners, Spectrum Technologies, Tec 360, Tesys 21, VASS, Vendor Neutral, WorkCentive, ZS Associates.

Machine Learning/AI Capabilities: Varicent embeds AI-driven automation and analytics capabilities in our Incentive Compensation Management and Sales Planning solutions. Clients can use Varicent's no-code data and analytics workbench to shape, analyze, and visualize data. Storytelling apps and pre-built blueprints for common SPM analytic use cases, including lead scoring, seller on-ramp, and seller churn, to speed time to insight for better decision-making.

Additional Offerings: Varicent ELT automates and simplifies data extraction, transformation, and preparation. Clients are empowered to use AI to spot outliers, missing data, and patterns to drive actionable insights and can take advantage of a growing library of pre-built data pipelines for common SPM data use cases like roster, order, and transaction validation.



OS INSIGHTS

VENDOR SELECTION & DEPLOYMENT CONSIDERATIONS

Through our view of the Varicent solution, Varicent continues its strong growth in the application in reporting, workflows, and incorporating A.I. in its integration layer. Varicent continues to maintain and improve its performance, support of complex rules and structures with its open architecture. The expansion in Sales Planning and other modules shows its commitment to an end-to-end solution and usability.



DATE FOUNDED
2005



EMPLOYEES
800+



PHONE
866-469-2285



LOCATIONS
San Jose, CA



REVENUE
Not Disclosed



WEBSITE
xactlycorp.com

Xactly has helped thousands of companies and millions of sellers around the world beat their revenue targets. Using Xactly's solutions, leaders look past the current quarter to create revenue streams for long-term growth. The Xactly Intelligent Revenue Platform marries artificial intelligence and 17 years of proprietary data in easy-to-use applications. Sentiment, process, and trend analysis come together to form accurate machine forecasts. Quick identification and implementation of revenue plans, quotas, and territory improvements are easy. And, rapid calculation of even the most complex compensation plans keeps sales reps motivated and on track.

This makes the Xactly Intelligent Revenue Platform the only solution that aligns seller behavior with boardroom strategy to create a resilient, predictable and profitable business.

of SPM Customers: Over 1,200+ customers

Hosted vs On-premise: SaaS

Pricing Model: Per payee per month

Training: Xactly has a broad portfolio of training options and certifications provided through Xactly University. Their education content is made available through many different media and formats, including Instructor-led online (through public courses or classes customized for a customer's organization), self-paced on-demand courses, recommended learning paths, as well as a la carte options.

Support: Phone, email, video conference. The Xactly Customer Support team is a 24X7 operation with globally dispersed leadership designed to ensure high-quality and continuously improving customer experience, regardless of time zone.

Average # of Payees Per Client: Varies by product, ranging from tens to tens of thousands

SPM Products/Solutions: Xactly Incent, Xactly Sales Planning, Xactly AlignStar, Xactly Territories, Xactly Operational Sales Management, Xactly Benchmarking, Xactly Objectives, Xactly Insights

Primary Industries: Business Services, Financial Services, High-Tech, Manufacturing & Wholesale, Retail, Telecommunications

Client Base: Xactly has users in almost every country in the world, providing solutions to any sized organization from the latest start-up to globally recognized enterprise companies.

Sample Customers: MetaCompliance, Highspot, Pendo, LinkedIn, ABM Federal, and Flowserve to name a few. Customer stories can be found on their website.

Technology: True multi-tenant SaaS

Integration with Other Systems: Xactly offers interoperability with any CRM, ERP, HCM, payroll systems, ETL, and reporting tools via ODBC/JDBC drivers or APIs. This includes out-of-the-box connections to Salesforce, Netsuite and Microsoft Dynamics, as well as estimator widgets for Salesforce and PROS CPQ.

Established Implementation Partner Network: Accenture, ATG, Appirio, Biconix, Canidium, Changi, Cloudbyz, Intangent, and others

Machine Learning/AI Capabilities: Xactly's data is one of the biggest differentiators, collecting, anonymizing and aggregating their customers' data for over 17 years. Using AI/ML, along with their own data, customers can compare their data against the industry's greatest source of compensation data, allowing them to draw insights and make more informed decisions.

Additional Offerings: Xactly Forecasting, Xactly Framework, Xactly Connect, Xactly Show Me, Xactly Commission Expense Accounting



OS INSIGHTS

VENDOR SELECTION & DEPLOYMENT CONSIDERATIONS

The review of Xactly shows the continued stability of performance and user friendly out-of-the-box UI and reports. Xactly's integration tool and add-on modules create seamless switching of functions and support of your SPM program. The solution and provider continue their commitment to customer support and satisfaction.



DATE FOUNDED
2020



EMPLOYEES
160



PHONE
(+39) 0583 15284



LOCATIONS
Lucca, Italy



REVENUE
Not Disclosed



WEBSITE
www.akeron.com

Akeron Srl develops modern applications that increase productivity, manage and improve business performance and put people at the center of the process. Based in Lucca Italy, with direct operations in UK and France, Akeron Srl has more than 500 clients covering all sectors and sizes, ranging from leading names such as Intesa Sanpaolo, Decathlon, Bolton Group, Prada and Cressi Sub to small and medium-sized companies.

of SPM Customers: +100

Hosted vs On-premise: Saas and On premise subscription

Pricing Model: Subscription base, per user and by module

Training: In person and virtual training programs including self-service online training

Support: Community portal available 24/7 and hotline first and second level support available from 9.00am to 6.00pm working days. The third level of support is available from 9.00am to 6.00pm only in CET.

Average # of Payees Per Client: Average 150 payees ranging from minimum of 35 payees up to 4.000+

SPM Products/Solutions: Sales planning & forecasting, Territory & quota planning, Incentive compensation modeling & what-is simulations, Incentive compensation/territory/quota management, Finance logic (for accruals management and analytical costs allocation), Performance reporting and dashboards, Sales Force Automation.

Primary Industries: Banking, Insurances, and other financial services (asset management, brokers etc.), Consumer Goods, Food & Beverage, Manufacturing, Media, Pharmaceuticals, Retail, Technology, Telco, Wholesale

Client Base: From medium size (above 100M turnover) companies to large enterprises (above 1B turnover)

Sample Customers: Intesa Sanpaolo, Decathlon, Fideuram, Eurizon, HDI Assicurazioni (Talanx Group), Sara Assicurazioni, Segafredo Zanetti

Technology: Akeron technology is built on the “modern application” pillars: **Break the silos:** a holistic enterprise solution for cross-organizational work, utilizing consistent data or “one version of the truth”; **Fast, powerful, and scalable:** Increase of capacity and functionality based on customer needs. Always stable while adapting to change; **Cloud & mobile:** Work anytime, anywhere with rapid implementations and continuous improvements; **Data-driven insights & AI:** AI-powered data exploration that uncovers actionable insights and opportunities; **User experience:** User-centered design to easily handle complex processes and improve productivity; **No-code configuration:** Easy workflow automation to personalize business processes and contribute to operations; **Uncompromised security:** the best available technologies to protect customers’ business and move it forward.

Integration with Other Systems: SAP HANA and Salesforce.com: Akeron solution is certified on SAP Hana and Salesforce.com; **CCH Tagetik:** Akeron solution is integrated with CCH Tagetik product (Wolters Kluwer); **Microsoft Dynamics:** Akeron solution is also integrated with Microsoft Dynamics

Established Implementation Partner Network: Akeron is opening its business (especially for the international development) to a wider partner community. As of today, we count on approximately 15 key consulting partners with which we are developing the market and working on specific projects. Some names are: Ernst & Young (cross countries), Inulta (eastern Europe and North America), and PWC (Italy).

Machine Learning/AI Capabilities: Advanced AI capabilities available and as of today applicable business model to the CPG Industry

Additional Offerings: To better serve Consumer Goods manufactures, Akeron also offers an advanced Revenue Growth Management solution that expands Sales Performance Management to include other key determinants of company revenues, such as trade promotion, trade contracts, digital commerce, etc.



OS INSIGHTS

VENDOR SELECTION & DEPLOYMENT CONSIDERATIONS

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**DATE FOUNDED**

2020

**EMPLOYEES**

45+

**PHONE**

(415) 799-4494

**LOCATIONS**Lewes, Delaware
Mumbai, India**REVENUE**

Not Disclosed

**WEBSITE**<https://www.kennect.io>

Kennect delivers a first-of-its-kind, end-to-end, intelligent incentive compensation management platform that enables organizations to accelerate their Sales Performance. Kennect is designed as a modern age no code sales commission platform that enables companies to drive desired sales behavior and bring transparency and agility to the sales compensation process. The platform allows the sales operations team to automate incentive compensation with complete transparency and auditability through its intuitive and sales-centric design.

of SPM Customers: Kennect handles Incentive compensation management for over 40,000 sales executives across the field sales industries like Pharma, Biotech, Medical Devices, Financial Services, Retail, Consumer, and Manufacturing

Hosted vs On-premise: SaaS, multi-tenant/single-tenant/VPC

Pricing Model: Kennect offers an annual subscription and highly competitive one-time implementation fees. There are no additional professional services fees.

Training: Each customer is assigned a dedicated Customer Success Manager and a technical consultant. During implementation, this CSM customizes training for everyone involved and helps facilitate adoption throughout the organization.

Support: Live chat, email, phone

Average # of Payees Per Client: 150-500

SPM Products/Solutions: Sales Crediting, Integrations, Incentive Plan Configuration & automation, Payouts with Exceptions, MBO Management, workflows, Performance letters and approvals, Dashboards, Analytics, Forecasting & Simulations

Primary Industries: Banking, Business Services, Consumer Goods, Energy, Financial Services, Food & Beverage, Healthcare, Hospitality, Manufacturing, Medical Devices, Pharmaceuticals, Retail, Telecommunications, Transportation, Utilities, Wholesale

Client Base: Enterprise and Growing Mid-size companies

Sample Customers: AstraZeneca, Swiggy, Sanofi, Lonza, Lupin, Incyte, Servier, Zydus



Technology: Core Technologies: Robust Data Processing Engine based on MongoDB and NodeJS, High Resilient System for Client Management & Authentication, Modern UI, deliverable as a lite-weight web app with advanced technologies such as Vuejs & AmCharts, Dynamic System Configuration to distribute & run modules, Dynamic Workflow engine for internal sporadic/structured multiplexed data-driven automation, Highly flexible and narrow access control mechanism for enterprise users. **Security & Infrastructure:** Kennect has obtained global ISO 27001 certification and is compliant with the CSA-STAR matrix, ISO 27001, and NIST 800-53; Kennect holds itself accountable to the highest security standards to ensure peace of mind. Kennect also provides role-based visibility and maintains detailed audit logs. Furthermore, Kennect has implemented the Disaster Recovery & Backup mechanism for Business Continuity; Encryption of all information at rest & in transit with best industry standards; Record of 0 security incidents and >99.9% service uptime since the foundation.

Integration with Other Systems: Integration with Salesforce, SAP/BW, Microsoft Dynamics, and all major CRM or ERP software, as well as custom software, is seamless through HTTP/FTP/GRPC/AWSS3 APIs

Established Implementation Partner Network: Kennect has both models for implementation - On its own and via partners.

Machine Learning/AI Capabilities: Kennect's intelligent nudging platform helps sales executives and managers identify shortfalls proactively and alerts them through different channels like notifications, emails, MS Teams, etc.

Additional Offerings: Data Warehouse Management, Sales attribution and crediting, Organization Hierarchy Management, Business Insights, and Reporting



OS INSIGHTS

VENDOR SELECTION & DEPLOYMENT CONSIDERATIONS

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opensymmetry

READY TO KICK OFF YOUR JOURNEY TO A BEST-IN-CLASS SPM SOLUTION?



[CLICK HERE TO DOWNLOAD
OUR SPM SELECTION GUIDE](#)



A FREE RESOURCE AVAILABLE TO HELP YOU START YOUR JOURNEY
TO A WORLD-CLASS SPM SOLUTION.

OpenSymmetry enables clients to achieve greater operational efficiency and get better sales results. OS is a global consulting company specializing in the planning, implementation, and optimization of industry leading technology suppliers of sales performance management solutions.

opensymmetry.com

os_info@opensymmetry.com

