

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.



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Date Founded: 2006
Location: San Francisco, CA

Employees: 1,900+
Revenue: \$447M+

Phone: 415-742-8199
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 and is a top-vendor offering a comprehensive suite of sales solutions in the Market Guide for SPM. 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, 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 1,600 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 CRM Inspection

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 is a 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.

Anaplan

Integration with Other Systems: Anaplan's flexible architecture and expansive network of integration capabilities gives businesses the ability lever industry-leading ETL and ESB tools to integrate with systems of record, such as Informatica, MuleSoft, Dell Boomi, SnapLogic, supports purpose-built integrations such as Tableau, Microsoft Power BI, Workiva, and DocuSign, and custom integrations using REST APIs, scripting, and Transactional APIs.

Established Implementation Partner Network: Anaplan's global strategic partners include 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 third-party ML-based systems, 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, Suppler Collaboration, Pricing & Promotions, Demand Blanning, Anaplan for Human Resources: Workforce Planning, Compensation Modeling, Talent Strategy



OS INSIGHTS ON VENDOR SELECTION AND 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 straightforward configuration, robust out of box reporting, and a strong online community to support the product in its future releases.



Date Founded: 2009

Location: Southport, CT and
Nyon, Switzerland

Employees: 150+

Revenue: Not Disclosed

Phone: 203-828-1072

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



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: Allied Irish Banks, Fujitsu, Lowe's, Mercedes-Benz

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: Please visit www.beqom.com for information related to all current offerings and solutions.



OS INSIGHTS ON VENDOR SELECTION AND 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
Location: San Francisco, CA

Employees: 90+
Revenue: \$63M Raised

Phone: N/A
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 integrations 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: 400+

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.

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.beqom.com for information related to all current offerings and solutions.



OS INSIGHTS ON VENDOR SELECTION AND DEPLOYMENT CONSIDERATIONS

The review of CaptivateIQ supports a business and representative friendly UI, flexibility in the configuration of plans with customizable reports and individual views. CaptivateIQ provides easy out 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
Location: Hoboken, NJ

Employees: 6,500
Revenue: \$1.648B (2020)

Phone: 551-256-5000
Website: nice.com/spm

NICE Sales Performance Management (SPM) is an integrated solution helping sales organizations better manage incentive compensation, sales crediting, territories, and quotas. With a focus on large sales organizations, NICE SPM supports complex incentive compensation plans, massive data volumes, unique business rules, and diverse organizational structures and hierarchies.

NICE SPM maximizes the self-sufficiency of compensation administrators, sales operation teams and other business users, allowing them to perform tasks independently and manage change efficiently. Business users can design and update complex compensation plans, test changes, and assign plans to payees; they can manage and troubleshoot sales crediting rules using a visual UI without the need for coding; and can automate cumbersome, manual business processes such as disputes and approvals using customized workflows.

With NICE SPM, incentive compensation is fully transparent, building the trust of sales reps and motivating performance. Sales reps have real-time access to their compensation statements via the web or their mobile devices and can easily initiate an inquiry or dispute directly from their mobile app. Managers can view aggregated data for all reps with monthly/annual summaries, top/bottom rep performance, attainment vs. targets, and more.

NICE SPM scalable architecture supports the processing of millions of sales transactions within minutes to determine quota attainment, calculate incentive payments, perform retroactive adjustments, deliver real-time reporting and support complex compensation plans, multiple currencies, and languages.

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 ON VENDOR SELECTION AND DEPLOYMENT CONSIDERATIONS

Our observations of Nice have shown that performance, ease of integration with multiple sources, and complex crediting are key areas of support within the application. In addition, NICE has embedded MicroStrategy BI tool to quickly deploy reports and high-level analytics.



Date Founded: 2006
Location: Newport Beach, CA

Employees: 50+
Revenue: Not Disclosed

Phone: 833-817-7084
Website: performio.com

Performio is an incentive compensation management software that combines enterprise functionality with the ease of use required of modern software applications. Performio is featured in the Market Guide for Sales Performance Management published by Gartner on March 8, 2021. Over the past year, Performio has made updates to their SPM product, including upgrades to UI and their territory and quota management solutions.

of SPM Customers: Around 100

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: 100 in Mid-market Accounts, 1000s in Enterprise Accounts

SPM Products/Solutions: API, Commission Overrides and Tables, Dashboards, Forecasting, ICM, Reporting, Systems Integration

Primary Industries: Automotive, Banking, Business Services, Financial Services, Manufacturing, Marketing & Advertising, Media, Medical Device, Pharmaceuticals, Retail, Software, Telecommunications, Wholesale

Client Base: SMB, Midmarket, and Enterprise primarily in North America and APAC

Sample Customers: AstraZeneca, Boehringer Ingelheim, GrubHub, Hudl, Johnson & Johnson, Optus, Service Express, Validity, Vodafone, Wedbush Securities, WP Engine

Technology: MySQL, React, Java hosted on AWS

Integration with Other Systems: Performio's SPM has an open systems approach that allows companies to natively integrate with Salesforce, Net Suite, and any other systems using REST API. Data transformation takes place in Performio; no pre-processing required.

Established Implementation Partner Network: Yes, Workcentive in Toronto and Outliers in South America

Machine Learning/AI Capabilities: On the Roadmap

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



OS INSIGHTS ON VENDOR SELECTION AND DEPLOYMENT CONSIDERATIONS

Through our review of Performio we have seen the ease of use and end-user interfaces for configuration resulting in less IT involvement in your implementation. Performio also supports multiple areas of compensation including objective management and cash and non-cash total rewards. Customer service is a high priority and rates high with their customer experience.



Date Founded: 2004
Location: Half Moon Bay, CA

Employees: 90
Revenue: Not Disclosed

Phone: 650-242-0008
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. We have 38 vertical solutions, the full list can be found at qcommission.com/Industry.

Client Base: 2,400 for all CellarStone products of which 1,800 are SPM customers, with an additional 600 from our other products, QExchange (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 41 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 ON VENDOR SELECTION AND 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
Location: Bellevue, WA

Employees: Not Disclosed
Revenue: Not Disclosed

Phone: 425-891-37998
Website: salescookie.com

Sales Cookie is a modern and intelligent platform designed to:

- Eliminate manual generation of commission spreadsheets
- Greatly increase commission agility
- Improve commission accuracy / avoid costly mistakes
- Deliver commission reporting across all payees
- Increase transparency and motivate reps
- 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. Our focus is on extreme flexibility. Unlike most other solutions, we successfully automate 99% of commission structures - without compromise. All data can be accessed via tools such as Excel, Power BI, Tableau.

We offer unique features such as open data APIs, revenue analytics, rep 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.

We process over half a billion in sales. However, the best technology means nothing without supporting resources. Sales Cookie provides a knowledge base with 400 KBs, 100 videos, a training program, and powerful management tools.

We have built next-generation intelligence in every aspect of our 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)

Training: 1:1 online and via our site (400+ KBs, 100+ video tutorials, training program)

Support: Online meeting, email, dedicated number

Average # of Payees Per Client: 25 to 1000+

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

Sales Cookie

Primary Industries: Technology, Medical Devices, Pharmaceuticals, Insurance, Energy, Media

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

Sample Customers: Excellent references available upon request

Technology: Microsoft Azure Cloud, Open Data APIs (ex: OData, Web Hooks, etc.), Data pools for 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: CRM: Salesforce, Dynamics, HubSpot, etc., Payment: Quickbooks, Stripe, etc., Integration: Zapier, Tray.IO, etc., 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 ON VENDOR SELECTION AND 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 configuration of plans with customizable reports and individual views. Real-time results and trace calculations enable quick and accurate configuration.



Date Founded: 1972

Location: Walldorf, Germany

Employees: 100,000+

Revenue: \$30B+

Phone: 800-872-1727

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 Sales Performance Management (SPM) solutions: SAP Commissions, SAP Territory and Quota, SAP Agent Performance Management

Primary Industries: Financial Services, Telecommunication, Healthcare, Retail, Consumer Industries, Discrete Industries, Service Industries

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

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.

Integration with Other Systems: SAP offers seamless integration with their hierarchy of hundreds of enterprise software, such as SFDC, Workday, legacy on-premise 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 ON VENDOR SELECTION AND DEPLOYMENT CONSIDERATIONS

Through our review of SAP's solutions, they are committed and continue to improve the platform with its move to Hana along with continued enhancements to out-of-box reporting analytics and the core application. In addition, the system maintains its ease of use out-of-box end-user configuration resulting in less IT involvement in your implementation. SAP also provides multiple areas of enhanced administration capabilities including SAP Territory and Quota, SAP Agent Performance Management.



Date Founded: 2017

Location: Sandy, UT

Employees: 100

Revenue: Not Disclosed

Phone: 385-287-0603

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: 200

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. We 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 Academy to help facilitate continual learning.

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

Average # of Payees Per Client: 200

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

Primary Industries: Business Services, 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, Brinks Security, TuffShed, 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, Webhooks, SQL Database, Workato IPaaS

Established Implementation Partner Network: Spiff has an inhouse 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.

Additional Offerings: Spiff Commission Expensing, Spiff Analytics



OS INSIGHTS ON VENDOR SELECTION AND DEPLOYMENT CONSIDERATIONS

Our review demonstrated that Spiff has favorable capabilities to provide and ingest data easily from SFDC along with other sources as it relates to data processing. Spiff provides business user configuration as well as transparency to reps and admins on source of calculations and components along with strong customer support structure.



Date Founded: 2005
Location: Toronto, Canada

Employees: 500+
Revenue: Not Disclosed

Phone: 647-374-5501
Website: varicent.com

At the end of 2019, Varicent purchased IBM's SPM solution and, in the last year, the company experienced significant revenue and customer growth. With the additions of their Symon.AI, Territory and Quota Planning and Lead to Revenue solutions, Varicent offers a broad suite of capabilities. Varicent has the ability to handle large transaction volumes and complex compensation packages, while providing advanced analytics through AI and machine learning.

of SPM Customers: 300+

Hosted vs On-premise: SaaS or On-premise

Pricing Model: Tracked payees

Training: Courses offered through: Web Based, Instructor-Led, Self-Paced Virtual

Support: InApp, Phone, email, video conference, free Ask the Expert consulting hours

Average # of Payees Per Client: Not provided

SPM Products/Solutions: Incentive Compensation Management, Territory and Quota Planning, Modeling, Workflow Management, Dashboards and Reporting

Primary Industries: High Tech, Financial Services, Medical Devices, Pharmaceuticals, Telecommunications, Hospitality, Media, Entertainment, Transports

Client Base: Enterprise and Growth Business

Sample Customers: Carnival, DXL, GettyImages, HughesNet, Moody's Analytics, Siemens, Shopify, ThermoFisher Scientific, T-Mobile, Quantum

Technology: One of the key advantages of Varicent versus other vendors is its flexibility around handling complex plans within the application and without the need for advanced programming or manual intervention. Varicent ICM reporting is driven off the same database as the calculation engine and requires no back-end ETL work. Varicent ICM also includes a native workflow tool that can be configured to address many Incentive processes such as approvals for quotas, payouts, and adjustments. The Varicent ICM base offering is tuned for performance, supporting clients with tens of thousands of payees and hundreds of millions of transactions. Our infrastructure is designed for high performance and our cloud team helps with monitoring and provisioning more pooled resources during peak processing times. Varicent has its own mobile application (available in the Apple App Store or Google Play Store) or can be integrative with Salesforce's application. Data can be transmitted to Varicent from any data source such as Salesforce or Workday using APIs or text files.

Integration with Other Systems: Varicent consumes data from any number of disparate data sources, integrating that data directly into an organization's existing infrastructure. Compensation results and commission statements can also be exported directly to downstream systems.



Established Implementation Partner Network: Yes: OpenSymmetry, Accenture, AWS, Better Sales Comp, BGF Analytics, BIConcepts, Blue Horizons Group, Everis, IBM Cloud, InnoVyne, Intangent, Lanshore, Neitek, Next Decision, Polarys, Pronostica, RCI, SalesGlobe, Skoruz, The Global Sales Operations Association, Spectrum Technologies, WorkCentive, ZS

Machine Learning/AI Capabilities: Varicent offers NLP based data connectors, data prep, data shape and data visualization through its Symon.AI platform which comes with a suite of storytelling Apps, sales performance management blueprints and the ability to run in embedded mode from directly within Varicent ICM.

Additional Offerings: Lead to Revenue, Symon.AI, Territory and Quota Planning



OS INSIGHTS ON VENDOR SELECTION AND DEPLOYMENT CONSIDERATIONS

Through our view of the Varicent solution we continue to see strong growth in the application in reporting, workflows, and the incorporation of A.I. Varicent continues to maintain and improve its performance, support of complex rules and structures with its open architecture. We have also seen expansion in other modules with the territory and quota solution.



Date Founded: 2005
Location: San Jose, CA

Employees: 600+
Revenue: Not Disclosed

Phone: 866-469-2285
Website: xactlycorp.com

Xactly is a privately held, SaaS company that provides cloud-based enterprise services for small businesses all the way up to the largest global enterprises. Xactly is positioned as a Leader in Sales Performance Management in reports from Gartner, Forrester, and Ventana.

Xactly empowers growing enterprises to effectively manage their revenue generation. Xactly's Intelligent Revenue platform carries organizations through the full revenue lifecycle by focusing on planning, territory and quota, incentives, and pipeline management and forecasting from initial strategy development through execution and prioritization of all aspects of revenue optimization. Harnessing the power of AI, Xactly's scalable, cloud-based platform combines great software with the industry's most comprehensive 16-year data set to give customers the trusted insights they need to improve sales performance and grow revenue.

of SPM Customers: Over 1,000 customers

Hosted vs On-premise: SaaS

Pricing Model: Per payee per month

Training: Xactly University offers multiple courses in different tracks, through different delivery options for targeted training: onsites, pop-ups, instructor led, on demand, eLearning, and user conferences held globally.

Support: Phone, email, video conference

Average # of Payees Per Client: Varies by product, ranging from 10 to 10s of thousands

SPM Products/Solutions: Xactly Incent, Xactly Advanced Quota Planning, Xactly Territories, 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 firm from the latest start-up to globally recognized enterprise companies.

Sample Customers: Carestream, Cascade, Cox Automotive, DocuSign, Hyatt, Interxion, Qlik, RosettaStone, TIBCO, Western Union, Salesforce

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: YAccenture, ATG Cognizant, Appirior, Biconix, Canidium, Changi, Cloudbyz, Intangent, and others

Machine Learning/AI Capabilities: Xactly's sales performance AI platform is backed by more than 16 years of aggregated and anonymized sales pay and performance insights from hundreds of thousands of subscribers.

Additional Offerings: Xactly Forecasting, Xactly Sales Planning, Xactly Forms, Xactly Connect, Xactly Show Me, Xactly Commission Expense Accounting



OS INSIGHTS ON VENDOR SELECTION AND DEPLOYMENT CONSIDERATIONS

The review of Xactly shows its stable user friendly out-of-box UI and reports suitable for both admin and sales representatives. Xactly offers integration tools with add-on modules to service and support your SPM program, in addition to a continued commitment to customer support and satisfaction.



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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.

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