

# IBM SPM for Salesforce.com

Driving sales efficiency  
and effectiveness with sales  
performance management

**Watson  
Financial  
Services**



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## Highlights

- Personalized commission statements
- Sales performance analytics and reporting
- Electronic plan approvals and sign offs
- Automated inquiry and dispute resolution
- Plan modeling and forecasting
- Graphical compensation plan design
- Audit log
- Available on-premise and Cloud

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## Benefits

- Reduce overpayment of commissions
- Increase selling time
- Align salespeople to corporate objectives

IBM® Sales Performance Management is a robust sales performance management (SPM) solution that helps sales professionals and executives efficiently manage their day-to-day operations and align sales strategies to long-term corporate growth. Designed specifically for business users, IBM SPM enables organizations to manage the entire sales lifecycle including assigning territories and quotas to new sales representatives, developing compensation plans, automating the calculation of incentives and commissions, and analyzing and communicating key performance metrics across the entire team. Unlike traditional manual or spreadsheetbased solutions, SPM offers the speed, flexibility, and visibility needed to dramatically increase the efficiency and ease of administering variable compensation programs while providing true, in-depth insight into identifying and capturing revenue opportunities.

### Extending SPM to CRM

To provide a more seamless experience to sales representatives, IBM SPM is embedded within salesforce.com so that business users can access personalized compensation details and commission statements, in addition to up-to-date customer relationship management (CRM) information, in a single screen. With an integrated application, sales professionals are able to significantly improve their efficiency and allocate more time to serving customers and driving additional business opportunities.

The integration between SPM and CRM also enables sales managers and executives to associate, analyze and compare the key metrics between sales performance and market opportunity. With a unified view of pre- and post-sales information, business users can not only more accurately forecast future revenue and sales spend, but also apply this intelligence to territory management to help optimize sales coverage models, as well as quota planning, to drive the right corporate objectives. IBM SPM and Salesforce.com empowers sales organizations to more effectively manage their costs and team performance.

## Improving sales performance with an expansive role-based feature set

### For sales management

- **Plan Eligibility** features streamline the process of defining and assigning new hires to compensation programs, as well as viewing, managing and modifying plans by components, weightings, tiers and payouts for existing sales representatives.
- **Territory Management** enables managers to assign territories by geography, industries, named accounts, or other hierarchies to each individual. Effective dating features simplify constantly changing coverage models or temporary territory coverage in the event of salespersons going on leave of absence.
- **Quota Planning** from top-down, bottom-up, or hybrid approaches helps to ensure that each sales team is aligned to the objectives of the business. Employees can also be placed under any number of compensation plans with varying pay periods to provide a more flexible pay program.
- **Sales Analytics** enable sales management to more quickly and easily report on sales performance metrics from a high-level perspective such as sales by month, product, or territory, down to in-depth analysis of team rankings or sales team productivity and effectiveness. Insight into plan performance, contest results and individual development also provide critical intelligence in motivating and retaining top talent in the organization.

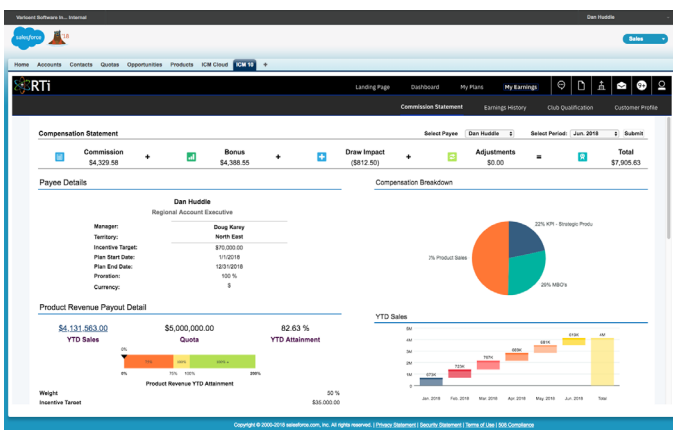


Figure 1: Single Sign-On enables users to access SPM and CRM information from a single screen.

- **Performance Appraisals** and MBOs allow managers to offer objective-based bonuses or compensation components to employees. Self-assessment worksheets or performance review documentation are delivered transparently and automatically to the appropriate parties through pre-defined workflows to facilitate top-down and bottom-up evaluations.

### For sales representatives

- **Plan Documentation** is personalized to each individual user in addition to any other tools or supporting materials. Compensation documents and communications are managed from a centralized repository to help ensure consistency and traceability.
- **Personalized Commission Statements** with drill-down capabilities for granular insight into payout details for each transaction eliminate shadow accounting to help maximize sales efficiency and opportunity.
- **Inquiries and Disputes** are fully automated through pre-configured workflows to streamline the resolution process. Communications and payout adjustments are tracked for compliance and accuracy.
- **Self-Calculators** and other forecasting tools enable users to perform ‘what-if’ analysis against their respective sales opportunities or expectations in order to determine the optimal tactics to generate results and revenue.

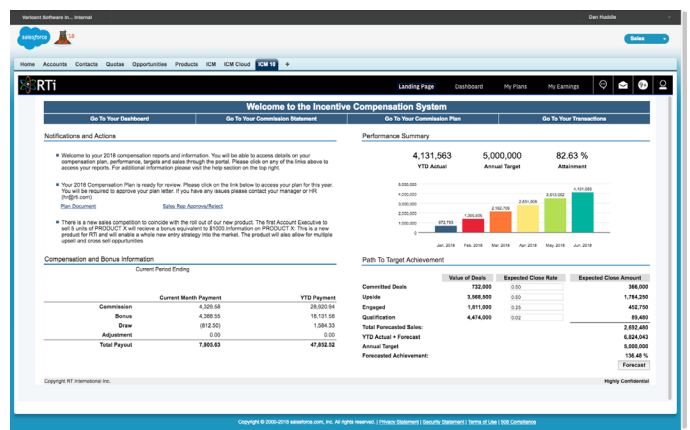


Figure 2: Varient provides high-level and in-depth analytics into sales performance.

## Why IBM Incentive Compensation Management?

### **Grow, retain and satisfy customers**

- Align sales resources with corporate strategy.
- Enable new kinds of plans and objectives that drive how clients are sold and serviced.
- Deploy territory structures and coverage models to support evolving customer needs.
- Gain insight to sales effectiveness.

### **Increase operational efficiency**

- Reduce related compensation, territory and quota cycle times.
- Deliver detailed, personalized incentive statements and reports to improve understanding and decision making.
- Leverage workflow for SPM processes, including inquiries and disputes.
- Ensure process scalability and flexibility.

### **Transform financial processes**

- Model compensation plans before rollout to understand and optimize its impact on the business.
- Create more accurate forecasting and accruals.
- Reduce manual intervention and errors.

### **Manage risk, fraud and regulatory compliance**

- Meet business and regulatory needs for controls and auditability into the compensation process.
- Provide program and process reporting.
- Improve program governance.

## About IBM Industry solutions

IBM Industry solutions software delivers data-driven insights that help organizations work smarter and outperform their peers. This comprehensive portfolio includes solutions for business intelligence, predictive analytics and decision management, performance management, and risk management.

IBM Industry solutions enable companies to identify and visualize trends and patterns in areas, such as customer analytics, that can have a profound effect on business performance. They can compare scenarios, anticipate potential threats and opportunities, better plan, budget and forecast resources, balance risks against expected returns and work to meet regulatory requirements. By making analytics widely available, organizations can align tactical and strategic decision-making to achieve business goals.

### For more information

To learn more about IBM Industry solutions, contact your IBM sales representative or visit: [ibm.com/industries/sales-performance-management](https://ibm.com/industries/sales-performance-management)

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