

Magic Quadrant for Sales Performance Management

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The \$850 million SPM software market continues yearly growth of 12% to 13% and is expected to reach \$1.4 billion by 2022. Application leaders supporting sales should focus on incentive compensation and utilize advanced analytics to expand from sales execution efficiency to plan/process optimization.

Strategic Planning Assumptions

By 2022, organizations using a sales performance management solution will use employee-facing digital assistants to handle 75% of compensation disputes.

By 2020, 30% of organizations using a sales performance management solution will optimize the design and maintenance of their sales compensation plans using advanced analytics solutions provided by their SPM vendor.

Market Definition/Description

The market, after a long educational period, understands the value of sales performance management (SPM) in an organization and there are sufficient use cases, and proven return on investment (ROI), to justify its purchase. This market is characterized by continued innovation, growth and adoption. SPM provides value from an end-user (sales representative/agent/payee) as well as an internal perspective, to improve sales execution and operational efficiency.

The benefits of SPM include:

- Reduced overpayment/underpayment, saving organizations 3% to 5% in compensation expense
- Increased scalability and performance through automation
- Increase sales representative (rep) performance by aligning compensation with corporate goals and objectives
- Faster data-driven analytics, shortening the time to decisions and actions

- Optimization of business processes and compensation plan design
- Increased revenue/profitability growth through compensation plan design that is based on historical results

For more information on technology, see "Hype Cycle for CRM Sales, 2017."

SPM solutions provide functionality that is shifting the benefits customers receive from efficient execution to effectiveness and optimization of processes, due to advanced analytics capabilities such as artificial intelligence/machine learning now being available and specifically designed for SPM.

The latest innovations from SPM vendors include:

- The development and delivery of capabilities around natural-language processing (NLP)
- Intelligence around compensation plan optimization and next-best action for sales reps
- Possible uses for bots to address reps' next-best actions and dispute resolution.

Organizations that have been using a packaged application for a longer period of time, can optimize their planning and processes through these newly offered advanced analytics capabilities in order to provide better business outcomes and additional value to the organization.

SPM solutions have been available for more than a decade, and provide mature capabilities. Not surprisingly, Gartner sees the Leaders in this Magic Quadrant tightly gathered, with no clear market leading vendor. Each vendor varies in the depth and breadth of its functionality. Buyers should document, at a granular level, their requirements, resources, skill sets and culture in order to select the most appropriate vendor for their organization. Application leaders supporting sales should focus on incentive compensation as a Phase 1 approach in order to provide immediate ROI followed by quota and territory planning and management, as needed.

Gartner defines incentive compensation management (ICM; including standard reporting and analytics), territory management and quota management as the three core capabilities for SPM. These core capabilities link to the following "near-core" capabilities: quota planning, territory planning, advanced analytics, gamification and objectives management.

Magic Quadrant

Figure 1. Magic Quadrant for Sales Performance Management



Source: Gartner (January 2018)

Vendor Strengths and Cautions

Anaplan

Anaplan returns to the Leaders quadrant on the strength of its product vision for SPM planning, customer experience results, and market responsiveness. During the past year, it significantly grew the number of new customers and demonstrated a notable ability to sell into complex SPM deals. It is most commonly purchased for quota and territory planning functions, but has a lower market penetration into incentive compensation implementations than other vendors. Anaplan offers three products in the SPM market: Sales Planning, Sales Incentives and Sales Insights. Anaplan's strength continues to be its unified planning capabilities, which connect it more closely to financial planning and analysis and SPM integration. Anaplan also offers a sales forecasting module, which is relevant to application leaders who need to connect financial revenue planning functions with sales forecasting processes.

Strengths

- **Scalability for incentive compensation:** Anaplan offers a wide range of calculation/crediting capabilities and was among the top vendors in the Leaders quadrant for scalability benchmark performance results conducted for this Magic Quadrant (see Note 1).
- **Business value:** Anaplan's reference customers consistently cited the business value they received from their Anaplan investment, as well as above-average satisfaction based on the value for money of the product compared with the average across all vendors.
- **Platform:** Anaplan has improved the core technology functions of its platform during the past year, adding functions such as new data visualization, application life cycle management functions and "Bring Your Own Key" encryption. Anaplan also offers Anaplan App Hub and Data Hub, a marketplace of third-party providers that sell SPM extensions to Anaplan's own SPM functions — such as sales forecasting or capacity planning.

Cautions

- **Integration:** Compared with the leading SPM vendors in this Magic Quadrant, Anaplan has comparatively weak integration capabilities. It lacks a native extraction, transformation and loading (ETL) tool, which means that clients must also consider HyperConnect (an integrated solution powered by Informatica) or deploying solutions from vendors such as MuleSoft, Dell Boomi, or Informatica (directly) in order to integrate back-end systems with Anaplan. Anaplan's Salesforce connector imposes data volume limitations that reduce functionality for large enterprises.
- **Modeling capabilities:** Gartner continues to draw cautionary statements from Anaplan's reference customers, and customers (through inquiry), regarding maintaining existing models. These customers find that mature models can become large and unwieldy over time, affecting model performance and/or rule maintenance.

- **Innovation:** While Anaplan has added several new capabilities, most of these improvements pertain to core functionality rather than SPM functionality. Innovation has come largely through partners via the Anaplan App Hub for industry-specific apps — in pharmaceutical and insurance, for example. SPM customers may have to evaluate these third-party applications in addition to Anaplan in order to complete their SPM product roadmap.

beqom

Beqom targets large enterprises in Europe and North America and remains in the Challengers quadrant. It has yet to expand its resources significantly into North America and its marketing execution lags behind the Leaders. Buyers in North America should understand the location and availability of resources for their implementation. Also called beqom, this company's product is delivered as SaaS only and offers all of the core SPM functionality — incentive compensation, and territory and quota management. The beqom product's analytics functionality is powered by Microsoft Power BI. It offers not only variable sales compensation, but also total compensation for nonsales employees in organizations that includes salary, benefits and long-term incentives. Enterprise buyers looking for a holistic compensation solution should consider beqom. Beqom integrates with a number of related applications such as CRM and ERP, and customers have been able to use its benchmark analytics to analyze performance drivers. Beqom focuses on customer satisfaction and retention of its customers.

Strengths

- **Product strategy:** Beqom has a strong strategy for its product, including a responsive UI-first development — which is desirable for most buyers whose end users utilize multiple devices. It has also made progress in advanced analytics such as sales comparative benchmarking and a prepackaged best practice library. Reference customers for beqom noted that the product was flexible.
- **Customer success:** Reference customers point to strong customer support, giving beqom a mean score of 4.4 (on a scale of 1 to 5 where 5 is completely satisfied) for the strength of its support organization. They also state that it had good leadership (customer success team) and support is responsive.
- **Scalability:** Beqom processes large volumes of data (data load through calculations and report refresh) with complex compensation, at speeds just slightly behind the highest scoring vendors on this data point (see Note 1). It maintains one of the largest payee bases (both sales and nonsales) of all vendors in the Magic Quadrant.

Cautions

- **Product:** Beqom received average scores for workflow and collaboration, as well as for ETL, compared with other vendors in this Magic Quadrant. Some reference customers cite forecasting and simulation as being in need of enhancement; enhancements in general were, while delivered, sometimes slower to arrive than expected.

- **Sales execution:** Beqom has a very low rate of new customer acquisition compared with the Leaders. Some reference customers note that sales overpromised on delivery.
- **Implementation:** Reference customers for beqom noted that the implementation team was thin on resources. The use of a third party to assist in the deployment may be required, especially in North America.

CallidusCloud

CallidusCloud is again positioned in the Leaders quadrant, based upon the strength of its SPM market strategy and product suite vision. It has a significant year-over-year increase in net new customers. CallidusCloud includes the full suite of core SPM functionality, including incentive compensation and territory and quota management, along with other near-core functionality such as gamification, quota planning, territory planning and advanced analytics. In addition, it offers complementary products such as Configure, Price, Quote (CPQ), its learning management system Litmos, and revenue recognition (from its RevSym acquisition) to address ASC 606 regulations. It serves the enterprise and large enterprise market with global deployments and Gartner has seen increased European expansion, due in part to its joint selling agreement with SAP. CallidusCloud continues to see a notable percentage of dissatisfied customers with regard to its customer support, and has introduced new programs to ease the issue.

Strengths

- **Product capabilities:** CallidusCloud continues to provide a user-friendly UI that has proven ability to handle complex functionality, including a fully auditable system at all levels. It provides many out-of-the-box connectors to integrate data both upstream and downstream. It also surfaces SPM estimation in relevant connected applications such as CPQ and CRM to increase business value.
- **Market responsiveness:** CallidusCloud continues its strong vision for the market by growing its offerings through acquisitions such as those for revenue recognition (RevSym) and sales forecasting and pipeline management (Datahug), and through homegrown innovations such as machine learning and NLP (for AI).
- **Geographic reach:** CallidusCloud has seen growth in the European market, due in part to its selling agreement with SAP. Gartner expects to see continued growth in Europe during the coming year due to this agreement.

Cautions

- **Customer support:** Reference customers report that CallidusCloud's deployment services fail to guide them with best practices. Customer support is inconsistent and lacking key resources, which has led to unresolved issues and the need for escalations. CallidusCloud will need to continue to address and improve on customer support and success to retain its existing, and attract new, SaaS customers. Buyers should seek multiple references to make sure they will be satisfied with the level of support.

- Product:** CallidusCloud customers deployed before 2017 are still utilizing combinations of Crystal Reports and Business Objects from SAP for standard incentive compensation reporting, which reference customers note required additional skills and training. Reference customers note that the reporting tool has been hard to learn, complex and may require vendor support. Beginning in 2017, CallidusCloud has replaced those tools with a new incentive compensation reporting tool utilizing Thunderbridge as the foundation. CallidusCloud also offers Thunderbridge Analytics, currently sold at an additional price for advanced analytics.
- Contracting/pricing:** Reference customers note that this vendor's resources are expensive and that functionality has been oversold during the sales process. Buyers looking to evaluate CallidusCloud should provide detailed and specific requirements for services to ensure that pricing adequately reflects the services to be rendered. They should also perform deep reference checks on complexity of solution sold versus deployed.

IBM

IBM continues to be placed in the Leaders quadrant based on its strong vision for its Sales Performance Management product suite and its ability to meet enterprise needs — including global, complex and high-volume deployments across industries. IBM has yet to execute against its full cognitive vision for advanced analytics, and buyers should consider this when evaluating these capabilities against other vendors in the space. IBM serves the midsize to large enterprise market, but has not achieved year-over-year growth of new customers at the same rate as other leading vendors. IBM offers near-core functionality through products such as IBM Planning Analytics for territory and quota planning and Watson Analytics for advanced analytics. Both of these products are offered separately and at an additional price to its Incentive Compensation Management product (ICM), which includes incentive compensation, territory and quota management and reporting, and is deployed as a single solution. IBM is one of the few vendors that deploys its product as either SaaS or on-premises. Buyers should probe IBM's product roadmap for ICM and review the past 12 months of product release notes in order to properly understand IBM's ability to innovate and execute against its vision compared with other vendors under evaluation.

Strengths

- Product strategy:** Reference customers state that IBM's ICM product is very flexible, reliable and accurate, and iPad support provides for easy mobile access.
- Service and support:** Eighty-two percent of IBM's reference customers are satisfied/ completely satisfied with the quality and effectiveness of its customer support organization. Many references state that the customer success team is very customer focused, providing a single point of contact, and, along with the postimplementation consulting team, provides excellent service.
- Scalability:** IBM offers the fastest processing time — from data load through calculation and report refresh — of all of the vendors evaluated in this Magic Quadrant, based on benchmark testing that includes complexity of plans as well as large volume and number of payees (see Note 1).

Cautions

- **Market understanding:** While offering a strong SPM vision to include incentive compensation, territory management and quota management, execution of a tight integration to Planning Analytics lags. Similarly, the connection to financial planning and analytics and other areas such as CPQ and CRM also lags compared with other Leaders in this space.
- **Product:** Some IBM reference customers cite that the native report writer (Presenter) is difficult to use, which makes ad hoc reporting difficult. The product also lacks canned reports. While most reference customers cite the product's flexibility, buyers with complex compensation plans should evaluate IBM's flexibility in configuration, while also understanding that flexibility drives a need for user discipline in the design and maintenance of the solution.
- **Customer experience:** Fifty-seven percent of IBM reference customers expressed dissatisfaction with end-user training and availability. References for IBM cite a lack of end-user training and documentation, and gaps in knowledge transfer from implementation to the customer success team. Also, 27% of its reference customers were either neutral or dissatisfied with IBM's service and support, compared with the overall vendor average of 12% for this Magic Quadrant.

Iconixx

Iconixx makes its first appearance in this Magic Quadrant, and is positioned in the Niche Players quadrant. Iconixx is a privately held company and focuses its sales efforts on companies with more than 100 payees. The product is only delivered as SaaS. Iconixx's application includes incentive compensation and territory and quota management, including territory and quota planning along with a mobile application. Advanced analytics tools are on its roadmap for 2018. It also provides Iconixx Merit for salary, promotions and merit calculations, which will be important to companies looking for a total compensation option. The Iconixx suite is newer to the market than those of other vendors in this Magic Quadrant, and is functionally less mature. Its geographic reach is limited to North America. It has seen the most traction in industries such as banking, manufacturing, healthcare, communications and insurance.

Strengths

- **Business value:** Reference customers score Iconixx well for execution efficiency, including time savings, eliminating manual work and being good value for the money.
- **Customer experience:** Customer success and support is seen as reliable, customer focused and providing good training. It is prompt in terms of support and received an average rating of 4.25 out of 5 (on a scale of 1 to 5, where 5 is outstanding) from its reference customers for the quality of its customer success organization.
- **Market strategy and understanding:** Iconixx utilizes multiple channels to communicate messages, including e-books and webinars, around important upcoming topics such as ASC 606. It also uses an ROI calculator and RFP templates to help build business cases — which will be useful for its target market.

Cautions

- **Product:** The Iconixx product is flexible, with a straightforward UI, but lacks some functionality for ease of use. It has configuration flexibility such as ad hoc audit reports, but data retrieval is limited and requires filtering to render.
- **Implementation:** Iconixx received average scores from its reference customers, compared with other vendors, for quality of professional services — with deployments for the majority of reference customers taking three to 12 months. Reference customers also had a median count of 175 payees. Buyers with large and complex deployments should request reference customers of similar size and complexity to speak with during their evaluation process. Reference customers state that better project management is needed, along with helping customers to understand best practices in design and training on use of the product.
- **Innovation:** Iconixx lags behind both the Leaders and Visionaries in this Magic Quadrant in terms of innovation for advanced analytics and planning, as well as in a connection to financial planning and analysis and CRM applications for depth and breadth.

Incentives Solutions

Incentives Solutions remains in the Visionaries quadrant. It is a privately held company and offers both a SaaS and on-premises deployment of its solution. It is also one of only three vendors in this Magic Quadrant to offer an insurance-specific product, INCENTIVES-PRO, which is targeted at and includes templates for calculations. Its JOOPY product is suited to midsize companies. Incentives Solutions' sales have focused largely on EMEA, in the following industries: insurance, communications, manufacturing, retail and wholesale trade. Incentives Solutions offers a free trial of the solution, which is unique in the marketplace and may be attractive to small or midsize businesses evaluating SPM. Global organizations will need to investigate Incentives Solutions and seek multiple references to properly understand its sales and service/support delivery globally and its ability to handle complex and large deployments.

Strengths

- **Product strategy:** Incentives Solutions provides advanced analytics in the form of vertical-based benchmarking. Sample size should be examined, for the vertical or other segment slice, for statistical validity. This vendor's solution has integration with the e-prize platform for gamification, and multiple out-of-the-box connections for ERP and CRM solutions.
- **Customer experience:** Reference customers continue to give Incentives Solutions high scores for support and customer success. Some reference customers note a focus on the customer, and understanding from the team.
- **Implementation:** Reference customers for Incentives Solutions give high satisfaction scores for ease of deployment and note that during the deployment the team was customer-focused and knowledgeable, and designed a good solution for them.

Cautions

- **Geographic reach:** Incentives Solutions continues to focus on EMEA, with less success in the rest of the world. It has yet to establish a significant resource presence or customer base in North America.
- **Product:** Incentives Solutions offers a fully functional SPM offering that includes basic workflow. Reference customers note that its workflow lacks flexibility, lagging behind on what-if simulations as well as in the need for preprocessing to work with the product.
- **Innovation:** Compared with the Challengers and Leaders, Incentives Solutions has not produced significant innovation in the marketplace. It has released mostly incentive compensation product improvements, with no major and innovative functionality during the past year.

NICE

NICE delivers both a SaaS and on-premises version of its SPM solution, and has strengthened its position in the Challengers quadrant this year for both vision and execution. NICE focuses its sales efforts on enterprise customers (700 payees and above) and has proven abilities to scale and handle complexity. It provides a full suite of incentive compensation, territory management and quota management as well as planning in a single solution. Within the past year, NICE released territory and quota planning, including built-in quota acceptance workflows that can be deployed either stand-alone or as part of the SPM offering. It has also released a full integration of its sales compensation analytics — which is included in the price of SPM. NICE also provides complementary products, such as workforce management and Voice of the Customer (feedback and coaching), which may be attractive to buyers focused on customer service; this was not evaluated as part of this Magic Quadrant.

Strengths

- **Marketing strategy:** NICE has improved its messaging and thought leadership across multiple marketing channels during the past year. It has global operations with a focus on the Americas and EMEA for the insurance, technology and financial services verticals.
- **Product strategy:** Reference customers for NICE report that it provides flexibility, scalability and is stable (uptime). NICE scored an average of 4.57 (on a scale of 1 to 5, where 5 is completely satisfied) for ability to deliver enhancements. It provided the third-fastest performance time in benchmarking tests of all of the vendors in this Magic Quadrant.
- **Customer experience:** NICE's reference customers report a strong customer support team that responds quickly to resolve issues and results in good customer satisfaction.

Cautions

- **Implementations:** Reference customers for NICE reported that both implementation and upgrades were difficult.

- **Product:** Reference customers for NICE reported that the UI was dated and needs some usability improvements on simple functions.
- **Sales execution/pricing:** Reference customers reported neutral scores for contract negotiation (neutral = 3 on a scale of 1 to 5 where 5 is completely satisfied), despite its list pricing being among the lowest of all vendors in this Magic Quadrant.

Obero

Obero is a new vendor to the Magic Quadrant, entering in the Niche Players quadrant on the basis of its comparatively limited market vision, execution capabilities, and low number of large implementations. Obero offers incentive compensation management and territory/quota management functions, which are relevant for application leaders looking for core SPM capabilities. Obero also markets capabilities not commonly offered by other SPM vendors, including revenue management as well as expense and profitability management. Obero primarily targets prospects with subscription-based and recurring revenue management business models, coming primarily from the high-tech and financial services industries. Lacking a network of third-party implementers, Obero implementation projects are delivered by its own professional services teams. In the past year, Obero enhanced the SPM product with solutions for ASC 606 compliance processes, crediting rule reusability and new modeling functions.

Strengths

- **Integration:** Obero offers native data integration connectors to Salesforce, NetSuite, Intacct, and DocuSign.
- **Product strategy:** With a focus on revenue management processes, Obero offers a roster of products including functionality to address ASC 606 compliance regulations that are relevant to businesses with recurring revenue/subscription-based business models.
- **Business value:** Customer references for Obero gave it strong marks for business value, citing the impact that it has on compensation planning processes and payroll processing.

Cautions

- **Implementation:** Compared with the Leaders, Obero lacks an extensive roster of implementation partners. Clients must therefore rely on Obero's own professional services teams to complete their implementations.
- **Change management:** Obero offers a comparatively low level of training documentation and implementation best practices, which is a consideration for companies with complex, large-scale SPM implementations.
- **Reporting capabilities:** Compared with the Leaders, Obero offers fewer business intelligence (BI) and reporting capabilities. The application lacks a native BI engine, which means that reports must be authored in Excel. Obero offers an out-of-the-box integration with Microsoft

Power BI (included in the license fees) for reporting and analytics. This may require additional skills/training.

Optymyze

Optymyze provides all the core capabilities of an SPM solution, including incentive compensation, territory and quota management in a single product. It's delivered as a SaaS solution and Optymyze provides a single price point for both license and deployment, with options for customers to utilize its "sales-operations-as-a-service" model. Optymyze has improved its position in the Leaders quadrant this year, largely based on its market responsiveness and marketing execution. It has delivered innovative releases, continues to enhance the product and has improved its messaging via multiple marketing channels. It continues platform support by enabling customers and third parties to develop applications and publish them in the Optymyze App Gallery. The product UI is modern, and configurable by business users. The adoption rate of all three core components — incentive compensation, territory management and quota management — per customer is among the highest of all vendors in this Magic Quadrant.

Strengths

- **Operations:** Optymyze has among the lowest deployment times for an average customer payee size of more than 1,000 payees. Optymyze performs all of its deployments using internal resources.
- **Business model:** For buyers with resource constraints — either number of resources or skill set/expertise — the sales-operations-as-a-service model will be helpful and can remove risks for implementation success. More than 73% of Optymyze customers use some portion of this service model.
- **Market execution:** Optymyze has increased its thought leadership and media presence through multiple marketing channels. It articulates the business value and quantitative results that its customers have achieved through use of the product.

Cautions

- **Customer experience:** Some reference customers for Optymyze report that better training is needed at the initial system knowledge transfer from professional services to live production. Customers who wish to manage the solution should ensure there is a proper transition plan in place for self-ownership.
- **Product:** Some reference customers for Optymyze report issues with ease of use, for example, on running jobs (import/export). Buyers should perform a thorough product evaluation based on their particular requirements in order to ensure a successful implementation.
- **Sales strategy:** Optymyze does not utilize a partner ecosystem for systems. Instead, it largely controls the sales and deployment processes. Optymyze has comparatively low new customer acquisition growth, year over year, compared with that of other Leaders in this Magic Quadrant and is not as often seen on the shortlists of Gartner clients inquiring about vendor selection.

Oracle

Oracle has strengthened its position in the Leaders quadrant this year, due to improved execution against its product vision by delivering innovative functionality. It has a strong understanding of the market and provides a global sales strategy — including an expansion strategy within the larger Oracle business, and utilization of its ecosystem including partners specializing in compensation strategy and plan design. It offers a complete solution, including incentive compensation, quota and territory management and planning, targeting enterprise customers. It also offers other complementary products through its sales, planning and budgeting — Oracle Planning and Budgeting Cloud Service (PBCS) — and service cloud offerings. Integration with other applications can be managed through native APIs or Oracle Integration Cloud Service. Companies looking for advanced planning functions in addition to incentive compensation will have to consider purchasing Oracle PBCS at an additional cost, as well as incurring additional integration costs.

Strengths

- **Product offering:** Oracle's incentive compensation is mature, with a business-user-friendly expression builder, business process workflow, and research features that provide clarity into results.
- **Innovation:** During the past year, Oracle has been innovative in data visualization for operations, predictive and prescriptive insights, REST web services for compensation plan objects, and territory-based forecasting.
- **Market understanding:** Oracle has a strong vision for the market and is able to deliver messages for all line-of-business buyers. It has built a strong connection to financial planning and analysis, and planning and optimization capabilities, which will serve well those buyers looking to connect sales execution and effectiveness across applications within their organization.

Cautions

- **Integration:** Several reference customers for Oracle report that prepackaged integration to non-Oracle applications is lacking. Oracle's current strategy does not include out-of-the-box integration with other CRMs and HR information systems (HRISs) such as Salesforce or Workday. Buyers with non-Oracle systems should note the possibility of additional time and cost to integrate and maintain or administer.
- **Performance and scalability:** Reference customers gave Oracle a mean score of 4.3 (on a scale of 1 to 5 where 5 is completely satisfied) for performance and scalability. However, its speed in processing from data load through calculations and report refresh during Gartner's (see Note 1) benchmark testing for this Magic Quadrant was slower than for most of the Leaders.
- **Customer support:** Oracle received the lowest reference customer scores of all of the Leaders for the quality and effectiveness of its customer support. References noted that support is slow to respond and generally opaque, and that global resources lacked product development

knowledge. Buyers with global or complex support needs should delve into this in more depth during their evaluation process.

Xactly

Xactly continues to strengthen its position within the Leaders quadrant based on its execution on product offering and its continued focus on customer satisfaction. Xactly is among the top three vendors being considered on many client shortlists according to inquiries to Gartner. It offers Xactly Incent for enterprises, Xactly Express for midsize businesses, and has introduced Xactly SimplyComp for small businesses. During the past year, Xactly has also introduced Territory Planning (from the AlignStar acquisition), which is priced separately, and has expanded its Xactly Insights product (benchmarking). Xactly Insights is now available to Xactly Express customers. It also released Xactly Insights for Sales based on its anonymized and aggregated customer base. Its estimator integration with Salesforce CPQ deepens the existing integration with Salesforce. Xactly also offers complementary products such as Xactly Inspire for training and coaching, which may be attractive to buyers focused on sales enablement in addition to SPM; this was not evaluated as part of this Magic Quadrant.

Strengths

- **Business value:** Xactly is able to strongly articulate its business value to prospects. Reference customers report that its Xactly Analytics and Xactly Insights solutions drive strategy, growth and the expansion of their organizations. The products provide visibility and increase accuracy and productivity, as well as enabling time savings for resources.
- **Market responsiveness:** Xactly has utilized its advisory board as well as customer feedback through multiple channels to drive its roadmap. During the past year, it has shown increased usage of its Xactly Insights product (benchmarking) and has extended the product to include functionality such as expense forecasting and services to address ASC 606 and International Financial Reporting Standard (IFRS) 15 regulations.
- **Customer experience:** Xactly maintains a focus on its customers, providing an online community as well as support and success teams. Reference customers gave Xactly among the highest scores for this Magic Quadrant for quality of customer success and support.

Cautions

- **Performance and scalability:** Some reference customers for Xactly cite issues with system performance. Xactly's speed in processing from data load through calculations and report refresh during benchmark testing for this Magic Quadrant was slower than for the other vendors (see Note 1).
- **Product adoption:** Xactly is among the lowest of all vendors in the Magic Quadrant for customer adoption of all three core pieces of SPM functionality (incentive compensation, territory and quota management).

- **Sales execution/pricing:** Some reference customers for Xactly state that product capabilities around configuration had been oversold and were harder than expected to implement, or required vendor or third-party support for changes.

Vendors Added and Dropped

We review and adjust our inclusion criteria for Magic Quadrants as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant may change over time. A vendor's appearance in a Magic Quadrant one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. It may be a reflection of a change in the market and, therefore, changed evaluation criteria, or of a change of focus by that vendor.

Added

- Iconixx
- Obero

Dropped

- SAP
- Vistex

Inclusion and Exclusion Criteria

The inclusion criteria for this Magic Quadrant represent the specific attributes that our analysts believe are necessary for vendors to qualify for inclusion:

- At least \$5 million in SPM software license revenue for the product being submitted for consideration
- At least 55% of total revenue comes from SPM software sales
- Offers a native ICM product inclusive of sales incentive compensation crediting, and includes out-of-the-box reporting and analytics, plus at least one other SPM capability: territory management, quota management, gamification, objectives management, advanced analytics (such as predictive, prescriptive, machine learning or benchmarking), territory planning, quota planning or sales comparative benchmarking (benchmark and analysis of sales execution including traditional and nontraditional data such as sales activities, or sales enablement activities including structured and unstructured data from non-SPM sources)
- Product has been in general availability (GA) for at least 12 months
- Has sold at least 15 net new named SPM accounts (that is, new logos, independent of reimplementations from previous versions of a product) during the past 12 months. The SPM

software purchase must be to manage the buyer's own SPM operations, not as a managed service function

- At least 20 active (live) named accounts (that is, logos, not subsidiaries or business divisions) for the SPM product
- Supports a customer base of at least four different industries (for example, banking, financial services, retail, insurance, telecommunications, media, travel and transportation)
- Offers a native cloud (SaaS) solution
- Private organizations must have more than 50 employees

Honorary Mentions

Several vendors in the SPM market provide innovative or unique products, but did not meet the revenue or technology criteria for inclusion in this year's Magic Quadrant. The following may be worth considering:

- [Axtria](#)
- [Performio](#)

Evaluation Criteria

Ability to Execute

Gartner analysts evaluate vendors on the quality and efficacy of the processes, systems, methods or procedures that enable IT provider performance to be competitive, efficient and effective, and to positively impact revenue, retention and reputation within Gartner's view of the market.

- **Product or Service:** SPM applications include capabilities for native ICM, territory management, objectives management, quota management, territory planning, quota planning, advanced analytics and gamification.

Different sales organizations require different levels of depth and complexity in their capabilities. Vendors that support a wide range of complexity have greater market potential and are rated accordingly. Vendors must articulate information regarding their product and the markets it serves. This is a cross-industry Magic Quadrant; the evaluation of a provider's offering is therefore focused on the provider's ability to serve several distinct industry sectors, rather than on the ability to provide industry-specific solutions.

In many cases, an SPM application will combine several functional components, some of which require third-party vendors. A key evaluation criterion is how well the SPM vendor's application integrates with third-party products and customer data sources. This is measured primarily by the number and complexity of data and application integrations, as demonstrated by live

customer deployments. Vendors that have fostered an ecosystem of value-added application suppliers and partners will rate highly for this subcategory.

- **Overall Viability:** Key aspects of this criterion are the vendor's ability to ensure continued vitality of a product, including the support of current and future releases, as well as a clear roadmap for the next three years. The vendor must have the necessary cash on hand, and consistent revenue growth during four quarters, to fund employee burn rates and to generate profits.
- **Sales Execution/Pricing:** The vendor must provide global sales and distribution coverage that aligns with its marketing messages.

Vendors will be evaluated based on measurable criteria that include, but are not limited to:

- Number of new customers acquired by SPM product
- Competitive replacements achieved by SPM product (not Excel/homegrown)
- Year-over-year acquisition of new customers (logos)
- Average deal size for SPM product
- Reference customers' product adoption for core and near-core capabilities
- Reference customers' perception of value for SPM product
- **Market Responsiveness/Record:** Ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change.

Vendors will be evaluated based on the number of innovative product releases, as well as the number and quality of the enhancements provided in those releases.

This criterion also considers the vendor's history of responsiveness to customers and to market dynamics, including the use of formal customer advisory programs, conferences and user groups.

- **Marketing Execution:** The clarity, quality, creativity and efficacy of programs designed to deliver the organization's message. The aim of this message being to influence the market, promote the brand and business, increase awareness of the products and establish a positive identification with the product/brand and organization in the minds of buyers. This "mind share" can be driven by a combination of publicity, promotion, thought leadership, word-of-mouth and sales activities, as well as the use of social media and other marketing channels to provide thought leadership, amplify marketing and sales messages, and brand. Vendors will be evaluated based on their appearance on buyers' shortlists, as well as their use of multiple marketing channels to reach prospects.
- **Customer Experience:** Feedback from active customers on generally available SPM releases during the past 12 to 18 months is an important consideration. Sources of feedback include vendor-supplied customer references, Gartner inquiries, crowdsourced reviews (such as Gartner Peer Insights), customer testimonials, and other customer-facing interactions such as Gartner

conferences. Customers' experiences are evaluated based on the vendor's ability to help its customers achieve positive business value, as well as sustained user adoption, quality, implementation and ongoing support.

Vendors will be evaluated on customer support as well as customer success functions.

- Operations:** The ability of the organization to meet its goals and commitments. Factors here include the quality of the organizational structure — including skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently on an ongoing basis. Also included, is the ability to deliver functionality/enhancements based on the product roadmap. For SaaS offerings, Gartner will evaluate the vendor's ability to manage operational infrastructure requirements and to provide postsales usage and adoption support.

Table 1. Ability to Execute Evaluation Criteria

Evaluation Criteria	Weighting
Product or Service	High
Overall Viability	Medium
Sales Execution/Pricing	Medium
Market Responsiveness/Record	High
Marketing Execution	Medium
Customer Experience	High
Operations	Medium

Source: Gartner (January 2018)

Completeness of Vision

Gartner analysts evaluate vendors on their ability to convincingly articulate logical statements. This includes current and future market direction, innovation, customer needs and competitive forces, and how well they map to Gartner's view of the market.

- Market Understanding:** Ability of the vendor to understand buyers' needs and translate these needs into products and services for the SPM market. Vendors that show the highest degree of vision listen and respond to buyers' current demands and respond with innovation and consistent product enhancements. They also have a clearly defined product roadmap to achieve their vision. Vendors demonstrate a strategic understanding of SPM capability trends, including operational efficiencies, planning processes, sales representative effectiveness, and go-to-market strategic alignment. In addition, the vendor demonstrates an understanding of SPM positioning with buyers' overall CRM, SFA, CPM and ERP strategies.

- **Marketing Strategy:** A clear, differentiated set of SPM messages that is consistently communicated throughout the organization and externalized through the website, social media, advertising, customer programs, and positioning.

Vendors will be evaluated on their customer segmentation strategies and their ability to communicate their message to those segments. Vendors will also be evaluated on their thought-leadership programs and vision for customer success.

- **Sales Strategy:** The strategy for selling SPM solutions that uses the appropriate network of direct and indirect sales, marketing, service and communication affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services and the customer base.

Vendors will be evaluated based on their vision for employing direct sales teams, resellers, system integrators and ISV companies. Vendors will also be evaluated on their ability to sell to operational leaders, business leaders and IT leaders.

- **Offering (Product) Strategy:** Vendors demonstrate a vision for SPM core and near-core capabilities that crosses the breadth and depth of the SPM market; this is critical for meeting the needs of a maturing market. The product strategy can be a combination of organic development, acquisition and/or ecosystems. However, for ecosystems, Gartner pays close attention to the quality and support of third-party vendors.

Gartner will evaluate product vision for core SPM capabilities:

- Sales incentive compensation
- Quota management
- Territory management

Vendors will also be evaluated for near-core SPM capabilities:

- Objectives management
- Territory planning
- Quota planning
- Advanced analytics (such as predictive, prescriptive, machine learning, benchmarking)
- Gamification
- Sales comparative benchmarking

Vendors will also be evaluated on their platform capabilities, integration with back-office systems (such as CRM, ERP, CPM, HCM and payroll), and third-party application marketplaces.

- **Business Model:** Vendors have a clear business plan for how they will be successful in the SPM market. These business plans should include appropriate levels of investment to achieve profitability and healthy revenue growth during a three- to five-year period. Sales channel and partnership strategies are important considerations in this criterion.

- **Vertical/Industry Strategy:** The vendor's strategy to direct resources, skills and offerings to meet the specific needs of verticals.
- **Innovation:** Vendors demonstrate a commitment to investment in new SPM areas such as planning, advanced analytics and complimentary process extensions.
- **Geographic Strategy:** The vendor's alignment of resources, skills and offerings to meet the specific needs of geographies outside the "home" or native geography, either directly or through partners, channels and subsidiaries, as appropriate for that geography and market.

Table 2. Completeness of Vision Evaluation Criteria

Evaluation Criteria	Weighting
Market Understanding	High
Marketing Strategy	Medium
Sales Strategy	Medium
Offering (Product) Strategy	High
Business Model	Medium
Vertical/Industry Strategy	Low
Innovation	High
Geographic Strategy	Medium

Source: Gartner (January 2018)

Quadrant Descriptions

Leaders

Leaders demonstrate a market-defining vision of how SPM technology can help the top-line business executives achieve business objectives. Leaders have the ability to execute against that vision through both products and services, and have demonstrated solid business results in the form of revenue and earnings. Leaders have significant successful customer deployments in North America (the largest adopters) and a global presence in a wide variety of industries, with proofs of organizational deployments above 500 users. Leaders are often what other providers in the market measure themselves against.

Challengers

Challengers are often larger than most (but not all) Niche Players, and they demonstrate a higher volume of new business for SPM. These vendors have the size to compete worldwide, but may not be able to execute equally well in all geographies. They understand the evolving needs of a sales

organization, but despite their strong functional vision they may not lead customers into new functional areas. Challengers tend to have a good technological vision for architecture and other IT organizational considerations, but they have not won the hearts and minds of top sales executives and/or application leaders.

Visionaries

Visionaries are ahead of most competitors in delivering innovative products and/or delivery models. They anticipate emerging and changing sales needs, and move the market into new areas. They influence the direction of the SPM market, but they are limited in terms of sales execution, operational execution or consistent record of customer success.

Niche Players

Niche Players offer products for SPM functionality. However, they may lack some functional components, may not demonstrate an ability to consistently handle deployments of more than 500 users across multiple geographies, and may lack strong business execution in the SPM market on a large scale. Niche Players may offer portfolios for a specific industry or software ecosystem. They demonstrate weaknesses in one or more important area with regard to supporting cross-industry requirements, such as product functionality for core SPM, and may include deficits regarding planning, advanced analytics or objectives management/gamification. Despite these shortcomings, Niche Players often offer the best solutions to meet the needs of particular sales organizations, industries or organizational sizes, in terms of the price/value ratio of their solutions.

Context

This Magic Quadrant covers a wide cross-section of vendors, including those that offer different delivery models (such as on-premises, hosted, hybrid and SaaS), and differing levels of functional breadth and sophistication. Whichever provider you are considering, ask yourself, "Will this vendor help my sales organization sell more effectively? Will my sales compensation team become more efficient and effective using the tools the vendor provides? Does my team have the skills to use the tools provided by the vendor?" In many cases, a sales organization must evaluate not just a vendor's suite of product offerings, but also the ecosystem of providers that can fill in gaps in that vendor's capabilities.

Use this Magic Quadrant as one point of reference for your evaluations. It is not intended to be the sole tool for creating a vendor shortlist. Use it as part of your due diligence and in conjunction with discussions with Gartner analysts. It is important to explore the market further in order to assess the capacity of each vendor to address your unique business problems and technical concerns. Depending on the complexity and scale of your requirements, your shortlist may be unique.

For this Magic Quadrant, Gartner collected end-user data from two sources: interactions with Gartner clients and the results of a primary research survey conducted specifically for this Magic Quadrant. The survey had 93 reference customer respondents, drawn from end-user clients identified by the software vendors included in this analysis.

Magic Quadrants are snapshots in time. To be fair and complete in its analysis, Gartner stops collecting data for Magic Quadrants at a consistent time. For this Magic Quadrant, the cutoff date was 29 September 2017.

Market Overview

The SPM market continued to mature in 2017, growing to \$850 million. Growth in SPM mirrored that of sales force automation (SFA) as well as the overall sales segment, with approximately 13% growth — a slight increase over the prior year. While the vendors in the space have maturing products, and the overall sales segment is mature, Gartner continues to see strong growth — close to that of the overall CRM segment, which is 14.3%. Using the forecast for sales software, we see a projected growth rate of about 12% to 13% for the next four to five years. It is likely that this growth will be driven by advanced analytics techniques, including artificial intelligence.

The products that are available to the market today all have the critical capabilities necessary to automate commission calculations and processes to various degrees (see "Critical Capabilities for Sales Performance Management" for additional information). The depth and breadth of these capabilities therefore becomes the differentiator. Understanding the skill set of the commission team, and the corporate culture, and marrying them to the right vendor will provide increased success in the deployment and automation of the execution of commission processes.

Incentive compensation management is generally Phase 1 in SPM. The approach provides immediate ROI and is often followed by quota and territory planning and management, as needed. Innovation in the SPM market can be seen in three areas — planning, connections and artificial intelligence.

Incorporating Quota and/or Territory Planning Will Drive Better Business Outcomes

The second phase of an SPM deployment usually includes planning; largely, quota planning. Deciding on the most suitable quota assignment to achieve the corporate goals, then creating those assignments using top-down and bottom-up approaches, requires collaboration. These processes have generally been largely manual, using Microsoft Excel as the main tool. With the functionality provided by SPM vendors, collaboration and workflow can be applied and automated to speed up the process and provide audit and tracking that will assist with compliance issues. SPM vendors now offer planning capabilities with advanced functions such as smoothing and seasonality. Application leaders should review vendor capabilities in these areas to provide additional value to the execution of SPM compensation plans. In many cases, planning can be purchased as a stand-alone offering, or incorporated/bundled with incentive compensation.

Create Synergies by Connecting SPM to Other Execution Solutions

SPM has a natural fit with SFA tools such as CRM, financial planning and analysis (FP&A) and CPQ when thinking about corporate goals and the planning, execution and monitoring of performance against the plan. Connecting the initial budget and revenue plan to the proper planning and setting of territories and quotas will provide a more accurate initial picture. Tying the sales forecast to those

quotas will make sure that the plan can be met, or tweaked to provide a more accurate picture of the business. The ability to surface information through the quoting system, which can drive the reps behavior through such capabilities as commission estimators, should increase the value of deals and lead to improved performance. The performance can be tracked through compensation plans to monitor and analyze execution, providing the business with regular indicators if performance is slipping or goals are being exceeded, and why. Sales reps are therefore more likely to provide more accurate information as part of the sales execution process, because they can see a more holistic picture of their opportunities and estimates on commissions earned at various stages of the deal cycle, such as quotes. Any movements can be corrected or adjusted, providing the business with the necessary information to perform better. Connecting SPM to these systems will enable monitoring and tracking of execution, providing a feedback loop to planning and creating a more accurate picture of the business and its performance against the corporate goals.

SPM Vendors Now Offer Machine Learning and Advanced Algorithms

These offerings support predictive and prescriptive analytics, benchmarking and visualizations for optimization of compensation plans and processes. NLP and bots are being developed and deployed by the vendors to assist with compensation plan optimization and next best actions for sales reps. These functions will aid in the optimization of plan design and processes around compensation, as well as planning for and predicting the future based on data. Such functions should also assist reps in focusing on business that will drive revenue and drive the behavior designed by the compensation plans. Gartner expects to see continued innovation, including the use of bots for dispute resolution to increase effectiveness.

Recommendations:

Application leaders should work across lines of business to facilitate the connection between SPM and other SFA and planning tools, in order to provide a more holistic view and accurate forecast of the business. Connecting SPM with FP&A tools in order to plan, based on the budget and revenue plan, to the quota and territory plan is essential for a more accurate forecast. Connecting the CRM sales forecast to the compensation plans will increase the accuracy of the compensation accrual forecast and provide a more accurate overall view of upcoming business. Compensation plan design can be focused more accurately to drive behavior, and monitored and tracked to ensure that behavior is reflective of the corporate goals — thereby leading to optimized performance. Analytics will allow faster data-driven decisions to be made with regard to adjustments and planning for future periods. A closed loop feedback to the planning process will ensure that all departments are aligned on a path to accurate business forecasts and results.

Acronym Key and Glossary Terms

ASC 606	Regulation relating to revenue from contracts with customers; issued jointly by the Financial Accounting Standards Board (U.S.) and the International Accounting Standards Board.
CPQ	configure, price and quote
CRM	customer relationship management
ERP	enterprise resource planning
ETL	extraction, transformation and loading
ICM	incentive compensation management
NLP	natural-language processing
SFA	sales force automation
SPM	sales performance management
UI	user interface

Gartner Recommended Reading

Some documents may not be available as part of your current Gartner subscription.

"Critical Capabilities for Sales Performance Management"

"Hype Cycle for CRM Sales, 2017"

"Predicts 2018: CRM Sales Technology Evolves With New Options for Improving Sales Outcomes"

"Use Advanced Analytics Techniques to Increase Sales Performance Management Effectiveness"

"How Markets and Vendors Are Evaluated in Gartner Magic Quadrants"

Evidence

Gartner collected input from 93 reference customers identified by the vendors, using a formal online survey. Also, from several hundred inquiries from Gartner clients evaluating the vendors' products, as well as independent customer conversations at conferences and events. Vendors were also interviewed and Gartner attended in-depth product demonstrations.

Note 1 Benchmarking Exercise

The following exercise was performed by all vendors participating in the research, to demonstrate performance capabilities at different scales:

- 10,000 payees
- Four-tier sales hierarchy covering associates and managers in 200 retail locations
- Five active plans
- Plans are "% weighted on-target earnings (OTE)" on a linear payout curve.
- There is a cap in month one and two of a quarter, with a true-up in month three.
- 100 SKUs/products per plan
- 10 active rules/plan
- 600,000 transactional records/month
- Record length at least 20 fields wide
- Three different currencies translated to U.S. dollars for payout
- There is one management by objectives (MBO) metric, based on customer satisfaction score, for a three-tier payout.

Processing times were evaluated to understand the scalability and processing time required for complex compensation plans with large data volumes: from loading data and including validation, all the way to the availability of final calculated results to end users. Individual categories were aggregated and the total time to process was used as part of scalability and performance evaluations of the vendors:

- Data file processing time — Includes server time for load, transformation, and aggregation processes.
- Average incentive compensation calculation time
- Average time for reports and analytics calculation/refresh

Evaluation Criteria Definitions

Ability to Execute

Product/Service: Core goods and services offered by the vendor for the defined market. This includes current product/service capabilities, quality, feature sets, skills and so on, whether offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria.

Overall Viability: Viability includes an assessment of the overall organization's financial health, the financial and practical success of the business unit, and the likelihood that the individual business unit will continue investing in the product, will continue offering the product and will advance the state of the art within the organization's portfolio of products.

Sales Execution/Pricing: The vendor's capabilities in all presales activities and the structure that supports them. This includes deal management, pricing and negotiation, presales support, and the overall effectiveness of the sales channel.

Market Responsiveness/Record: Ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This criterion also considers the vendor's history of responsiveness.

Marketing Execution: The clarity, quality, creativity and efficacy of programs designed to deliver the organization's message to influence the market, promote the brand and business, increase awareness of the products, and establish a positive identification with the product/brand and organization in the minds of buyers. This "mind share" can be driven by a combination of publicity, promotional initiatives, thought leadership, word of mouth and sales activities.

Customer Experience: Relationships, products and services/programs that enable clients to be successful with the products evaluated. Specifically, this includes the ways customers receive technical support or account support. This can also include ancillary tools, customer support programs (and the quality thereof), availability of user groups, service-level agreements and so on.

Operations: The ability of the organization to meet its goals and commitments. Factors include the quality of the organizational structure, including skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently on an ongoing basis.

Completeness of Vision

Market Understanding: Ability of the vendor to understand buyers' wants and needs and to translate those into products and services. Vendors that show the highest degree of vision listen to and understand buyers' wants and needs, and can shape or enhance those with their added vision.

Marketing Strategy: A clear, differentiated set of messages consistently communicated throughout the organization and externalized through the website, advertising, customer programs and positioning statements.

Sales Strategy: The strategy for selling products that uses the appropriate network of direct and indirect sales, marketing, service, and communication affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services and the customer base.

Offering (Product) Strategy: The vendor's approach to product development and delivery that emphasizes differentiation, functionality, methodology and feature sets as they map to current and future requirements.

Business Model: The soundness and logic of the vendor's underlying business proposition.

Vertical/Industry Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of individual market segments, including vertical markets.

Innovation: Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or pre-emptive purposes.

Geographic Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the "home" or native geography, either directly or through partners, channels and subsidiaries as appropriate for that geography and market.

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