

Planmeca Uses Xactly for CRM to Streamline and Enhance Incentive Compensation Management



Quick Upfront

Manager of Business Applications and IT, Chris Hyerdall, explains how implementing Xactly for CRM improved the efficiency of their revenue operations by increasing the reliability and accuracy of their incentive compensation data.

Advanced Businesses Need Advanced Technology

Founded in 1971 and with a strong commitment to technological advancements, Planmeca has emerged as a global leader in the dental industry, with a wide range of cutting-edge dental equipment, such as digital imaging systems, dental units, and CAD/CAM solutions as well as innovative software solutions that integrate seamlessly with their equipment. The company's commitment to research and development has resulted in numerous patented advanced technologies that enhance the precision, efficiency, and patient experience in dentistry.

Planmeca has been using compensation management software for over a decade and Chris Hyerdall, the Manager of Business Applications and IT oversees it all.

With approximately 35 sales reps, 4 managers, and 10 compensation plans, Chris oversees the administration of Salesforce and the implementation of the sales compensation software. Among the many challenges of his role, Chris found the limited functionality of his previous compensation management software needed addressing, and that brought him to Xactly for CRM. Chris explains, "When I first started doing commissions, I was using an earlier Xactly product, designed for smaller companies, which didn't have as many tools and bells and whistles as I needed, especially as our needs continue to evolve."



Implementing Xactly for CRM

After evaluating their options, leadership at Planmeca decided to implement Xactly for CRM, primarily for its robust features and seamless integration with Salesforce. "We ended up switching to Xactly for CRM because we liked the way the information was all inside Salesforce itself." A native Salesforce application, **Xactly for CRM allows sales representatives to access all relevant information**, including credit, returns, sales orders, and manual adjustments, directly from the opportunity record. Chris also customizes dashboards for different reps, providing them with quick and easy access to their sales data - all within Salesforce, as well.





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Chris Hyderall

Manager, Business Applications And IT

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The Many Benefits Of Using a Native Salesforce App

With management and sales teams working comfortably in the Salesforce environment, **an incentive compensation application that also works in Salesforce is key to data integrity, accuracy, and reliability.** “It’s really effective for me to be able to administer Xactly for CRM in the same way as any other object in the Salesforce system. Adding additional information and controls is easy and doesn’t require external assistance.”

Moreover, **having all the compensation-related information within Salesforce improves navigation and accessibility for the sales team.** Sales representatives and managers, already in a familiar environment, find it convenient to run reports, make changes to compensation plans, or access commission data without the need to switch to another system.

Better Quota Tracking And Sales Coaching

Xactly for CRM makes sales quota tracking and coaching easy for the sales team. As Chris explains, “We set quotas every year on our fiscal year, and the sales team gets quota bonuses for hitting certain attainment values.” **Xactly for CRM’s integration with Salesforce allows their sales managers to monitor and discuss quota attainment with their reps in real-time.** And the ability to track actuals within the platform provides a significantly more accurate representation of sales performance, especially when compared to processes that relied on rough estimates based on opportunity closes.

Improved Commission Accuracy And Reduced Errors

With Xactly for CRM, Planmeca has observed a significant increase in commission accuracy. “Being part of the implementation process and working closely with the Xactly team improved my understanding of the power of the system, and it’s led to more accurate calculations.”

Importantly, the implementation of the platform has brought more trust and transparency to the entire compensation process with a **15-20% reduction in errors since implementation.**

Enhanced Day-To-Day Operations

The ease of accessing data and finding answers quickly has significantly improved Chris’s day-to-day operations. As he puts it, “Having all the information readily available in Xactly for CRM and Salesforce makes it quick and easy for me to explain commission details to the sales reps.” The intuitive interface and comprehensive information provided by Xactly for CRM dashboards have also minimized the number of compensation-related questions, allowing them to focus more on sales effectiveness.



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Streamlined Processes

The implementation of Xactly for CRM has effectively streamlined Planmeca's incentive compensation management process, giving Chris Hyerdall access to new tools, robust functions and features, that give him more insight and control over compensation data and processes.

The integration with Salesforce, enhanced quota management, and subsequent reduction in errors have streamlined day-to-day operations, while the **ease of use and accessibility of data has allowed sales reps to focus on sales activities and improved productivity!**



THE BENEFITS OF XACTLY FOR CRM

Clean Data

Organize all commissionable event data within Salesforce, verify the information, and collaborate with your administrator to resolve any disparities fast

Quick Time To Value

Build and manage your compensation programs in no time without the need for pricey implementation costs with Xactly for CRM preconfigured for Salesforce

Analytics

Track every deal through each step of the incentive process from closed/won to when payments are finalized, all within Salesforce

Error-Free Payouts

Automate incentive compensation programs to eliminate payout errors and increase payout accuracy up to 99.8%

Powerful Revops Tools

Improve your RevOps management with gated approvals processes, audit tracking, and data discrepancy analytics

Reporting

Streamline use of powerful Salesforce analytical tool and help build intuitive dashboards to measure compensation program effectiveness with pre-built templates

Automated Calculations

Remove the need for offline calculations and enable all incentive data management to occur right within Salesforce

Improved Salesforce Adoption

Help keep tasks and collaboration within Salesforce, where simplified workflows, familiar tools, and applications are readily available

On-Demand Visibility

Give reps on-demand visibility into their comp plans and commissions within the platform they already use every day-decreasing disputes and inquiries while motivating them to hit quota

About Xactly

Xactly provides the only AI-powered platform that combines revenue intelligence and sales performance management so organizations can unlock their full revenue potential. Backed by two decades of pay and performance data, Xactly's Intelligent Revenue Platform is designed for finance, revenue, compensation, and sales leaders who want to drive quality, sustainable revenue. To learn more about Xactly and the latest issues and trends in revenue intelligence, visit us at XactlyCorp.com, follow our [blog](#), and connect with us on [LinkedIn](#).

