



Top Use Cases for Xactly Extend

4 Ways to Streamline Execution of Complex, Cross-Functional Processes

GUIDE



What is Xactly Extend™?

All organizations have processes that span multiple go-to-market (GTM) teams with strict deadlines and varied compliance standards. (e.g., Sales, Marketing, HR, Finance, Accounting, etc.).

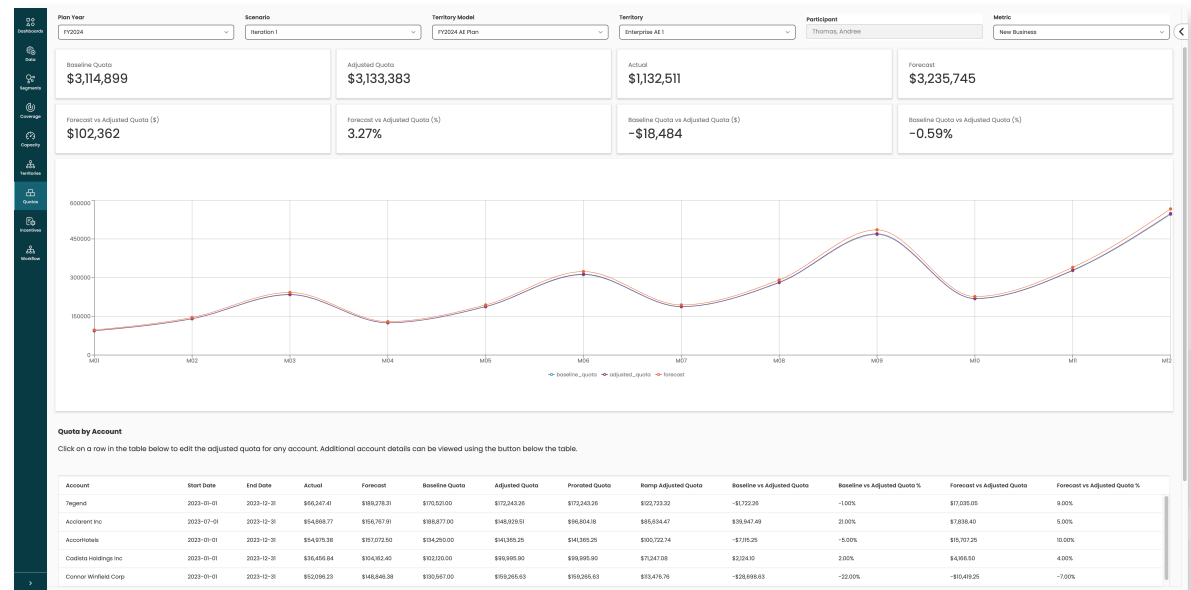
These processes, including payroll approvals, credit assignments, deal claims, quota setting plus allocations, and manager-based objectives are all data-dependent and executed differently across organizations.

And, it's difficult to execute on the required approvals and adjustments while bringing in the right data. This creates bottlenecks and errors that inhibit productivity and lead to frustration across all teams involved. When coupled with changes to strategy, roles and responsibilities, and market uncertainty, executing these processes becomes even harder.

That is where Xactly Extend comes in. Extend delivers custom-built applications, created by Xactly experts, that consolidate and simplify the execution of processes, such as those listed above. It serves as the system of record for these sales performance related processes and acts as the connective tissue between Xactly solutions and external systems (e.g., CRM, HCM, ERP, etc.), ensuring proper data flow, compliance, and timeliness.

Xactly Extend unites all relevant stakeholders and data to optimize and redefine how teams execute processes with the help of Xactly's experts in compensation and revenue performance management.

Xactly Extend automates and optimizes business processes—like payroll approvals, credit assignments and quota setting—that span Xactly solutions and other business systems to improve efficiency, data accuracy, and insights that influence decision-making.



By using Xactly Extend, **you can** extend the value of the Xactly Platform to:

1 Increase Operational Efficiency and Agility

Automate sales performance processes for streamlined execution, lower costs, and happier employees and customers. Xactly Extend allows you to build, manage, and track automated processes all in one place, utilizing pre-built custom applications, giving employees valuable time back for more meaningful, non-routine work.

2 Experience Real-Time Data Insights to Drive More Informed Decisions

Unify and enrich data from across business systems to uncover insights that drive more informed decisions. Beyond having all the necessary data to execute, Xactly Extend allows for real time data visualization to track exactly what teams need to make informed decisions and monitor progress of all relevant teams.

3 Collaborate More Effectively Across GTM Teams

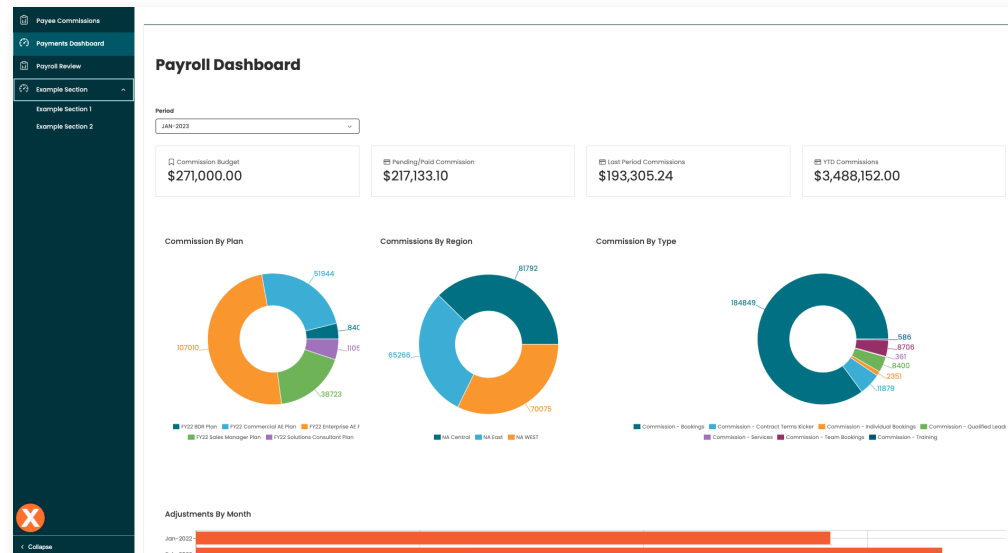
Reduce friction among collaborating teams by leveraging a single system of record for key sales performance processes. Use that single source of truth to reduce the amount of manual work stakeholders content with while moving essential reporting, reviews, and audits to a singular locations for seamless cross-team execution.

4 Integrate Securely & Achieve ROI Quickly

Quickly and securely deploy automated processes that span multiple business systems. Securely integrate data across systems to drive efficiency and agility in building a more data-driven organization. This ensures proper workflow and approvals, and allows you to gain control over data and processes with robust security, controlled access and complete audit capabilities.



An Extend app can be customized to include various data visualizations to help inform real-time dashboards, like this payroll example.



Xactly Extend Use-Cases

Xactly Extend offers the ability to leverage bespoke applications to accommodate the nuances of your business processes.

Below are several example use cases that Extend can automate and optimize through custom applications.



Simplify the Payroll Approval Process

Challenge: Payroll approval processes are often difficult to manage. They generally require connecting multiple teams, data sources, strict compliance standards and tight deadlines.

Solution: Xactly Extend provides one centralized location for all relevant users to view their respective information, actions, approvals and process flows. It provides controlled access and data connections to ensure payroll approval processes are consolidated and users can track process completion, and ensure smoother execution.

Advantage: Having a system of record backed by permission controls allows for the secure management of the entire process. This makes it easier for all teams to execute their goals amidst the complexity, while having all the necessary data and stakeholders relying on one auditable source.



Increase Consistency, Effectiveness and Transparency of MBOs

Challenge: Employee objective monitoring is often ignored and can result in misalignment across incentives, quotas, and crediting structures as time goes on. Beyond that, many organizations struggle with establishing management based-objectives (MBOs) processes and touchpoints for their MBOs, especially as responsibilities and goals change over time.

Solution: Xactly Extend's data connectivity and customizable nature allows for more complex objective plans, and ensures they can be more agile and data-driven. And, they can be balanced and aligned with things like credits, incentives, and quotas.

Advantage: Creating a data-informed hub for managing objectives equips users with the ability to manage them all more smoothly than they do now.

Xactly Extend provides confidence that objectives and goals align with overall strategy. Moreover, employee touch points can be more meaningful, with better tracking of accomplishments and improved transparency to better measure completed tasks in comparison to goals.



Streamline Quota Allocation to Minimize Friction From People Movement

Challenge: Whether it's through promotions, role changes, new hires or departures, people movement can cause bottlenecks. Thus, creating and distributing sales quotas is a data-dependent, continuous process. Because quota allocation can be a moving target, the connection between quotas and incentives is often unclear.

Solution: Xactly Extend connects the dots between strategy, process, data and execution in managing the quota process. Extend creates the hub to manage allocations, quota design, and nuanced processes that exist, while making employee data more accessible.

Advantage: The right solution provides transparency into the relevant metrics, quota design and approval threads. This is managed by user-based access, ensuring accuracy and auditability. Xactly Extend allows organizations to more effectively tie quotas, compensation plans and crediting structures into one quota planning process, alleviating some of the stress that comes with headcount shifts.



Leverage real-time data to inform monitoring activities, such as for disputes and inquiries.



Manage Crediting, Accruals, and Manual Adjustments Processes Seamlessly

Challenge: Maintaining alignment between incentives and actual credits for work can be hard to manage at scale. Beyond that, manual adjustments, discretionary bonuses, deal claim activities, and even standard accrual processes add to an already chaotic load.

Solution: Xactly Extend brings all the data and people together. It can be molded to fit the way teams handle accruals, adjustments, deal claims, and other activities to ensure transparency and accurate payouts.

Advantage: The key to any crediting/ adjustments/ accruals system is flexibility to accommodate potential updates and necessary actions quickly and easily. Xactly Extend reduces disjointed processes, leading to fewer manual tasks, more informed conversations between employees and managers, and an increased sense of connectedness.

Deal Claim

- Review available orders below
- Use the search bar to find on deals of interest (optional)
- To claim a deal, click on an order and submit the form for manager approval

Search Orders:

Reset

Opportunity Name	Opp Owner	Period	Incentive Date	Amount	Product	Region	Discount	Contract Term (months)
ABC Amego Existing Business 2022	Edwin Murphy	JAN-2024	2024-01-31	\$66,711.00	Cumulus-300	NA WEST	20.0%	12
AFPH Existing Business 2022	Adam Kelley	JAN-2024	2024-01-31	\$70,300.00	Alto-200	NA WEST	20.0%	12
AFPH New Business 2022	Amy Wilson	JAN-2024	2024-01-31	\$138,547.00	Cumulus-200	NA WEST	30.0%	12
ALL TRADES QUEENSLAND New Business 2022	Toby Barriater	JAN-2024	2024-01-31	\$78,089.00	Nimbus-95i	NA WEST	40.0%	60
ARASOL SL Existing Business 2022	Sienna Barrett	JAN-2024	2024-01-31	\$1,787.00	Arcus-200	NA East	0.0%	36
AST Trust Company Existing Business 2022 2	Kelsey Hawkins	JAN-2024	2024-01-31	\$10,493.00	Nimbus-30	NA East	40.0%	12
Acrisure LLC Existing Business 2022	Owen Bennett	JAN-2024	2024-01-31	\$266,807.00	Nimbus-30	NA WEST	30.0%	12
Advantage RN Existing Business 2022	Kelsey Hawkins	JAN-2024	2024-01-31	\$2,375.00	Nimbus-30	NA East	0.0%	12
Agile Truck Tools Existing Business 2022	Tess Richardson	JAN-2024	2024-01-31	\$13,105.00	Arcus-400	NA East	0.0%	12
AirPlus International Existing Business 2022	Carlos Ryan	JAN-2024	2024-01-31	\$98,420.00	Cirrus-500	NA East	40.0%	12

1 - 200 OF 692 2 3 4



Automating and Extending GTM Business Processes

Using Xactly Extend, teams can move off of disjointed processes. This means fewer manual tasks, more informed conversations between employees and managers, and an increased sense of connectedness. The impact of this can be immense, even helping organizations to retain top talent.

Xactly Extend helps organizations break down data silos and more effectively execute complicated processes that they struggle with in today's world of diverse tech stacks and distributed teams.

To learn more about Extend, [contact an Xactly expert today.](#)



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](#).

 XactlyCorp

 [Inkd.in/xactly](https://in.linkedin.com/company/xactly)

 Xactly

 @Xactly

 XactlyCorporation
