

THE COMPLETE GUIDE TO TECHNICAL HEALTH CHECKS FOR XACTLY

Cost, Benefits, Phases, and ROI

What a THC Includes:

We examine every layer of your configuration, integration, and data flow to ensure your platform performs as intended—and evolves with your business.

You'll receive:

- A detailed audit report highlighting configuration issues, bottlenecks, and security vulnerabilities
- Prioritized action items and improvement roadmap
- System performance metrics and benchmark analysis
- A guided executive debrief with Canidium's specialists



"It's like an MRI for your tech solution—revealing what you can't see before it becomes painful."
— Jason Kearns, EVP, Canidium

What a Technical Health Check For Xactly Looks Like:

Common issues: Misaligned crediting logic, outdated quota formulas, and broken integrations that lead to payout disputes, delayed commissions, and declining sales trust.

Our focus: Validate your incentive plan logic, thoroughly assess the performance of business rules, and proactively ensure seamless data accuracy between HRIS and payroll systems.

Result: 30% faster commission cycles, reduced disputes, and renewed confidence in every payout—driving stronger motivation and retention across your sales organization.

The Benefits of A Technical Health Check



From improving resource allocation and streamlining processes to fine-tuning configurations, our technical health checks ensure your systems perform at their best. Your customers will appreciate that.



Canidium evaluates your systems against relevant compliance requirements. By proactively managing compliance risks, you can avoid penalties, fines, and reputational damage.



Gain valuable insights and recommendations for future planning and strategic decision-making. Develop a roadmap for future growth and innovation. Whether scaling your infrastructure, adopting new technologies, or implementing proactive maintenance strategies, our technical health check equips you with the information and guidance you need to stay ahead of the curve and drive long-term success.

Through a comprehensive assessment of your technical infrastructure, Canidium prevents costly downtime, minimizes disruptions to your operations, and maintains the reliability of your systems.



A thorough examination of your security measures and protocols will uncover potential vulnerabilities and weaknesses. Canidium fortifies your defenses against cyber threats and safeguards your sensitive data.



Canidium's technical health check identifies opportunities for cost optimization within your technical infrastructure. This means you maximize the value of your investments, reduce unnecessary expenses, and achieve greater cost efficiency across your entire organization.



THE 3 PHASES OF A TECHNICAL HEALTH CHECK

Phase #1

This foundational phase involves thoroughly diving into the system to collect all relevant data and understand its current state. The goal is to identify what has been built, how it operates, and any challenges that might exist. Key activities in this phase include:



Reviewing the Current Setup and Architecture:

The team evaluates the technical architecture, workflows, and configurations to identify areas that might need improvement or optimization.

Conducting Meetings: Meetings with the THC team are held to uncover known issues, inefficiencies, or areas of concern. These discussions are critical for gathering insights that might not be apparent from the system alone, such as persistent problems, user frustrations, or operational bottlenecks.

Assessing Existing Documentation:

The team reviews any available documentation, such as operational guides or process flows, to understand the system's intended functionality and pinpoint gaps in knowledge or resources.

Uncovering "Low-Hanging Fruit":

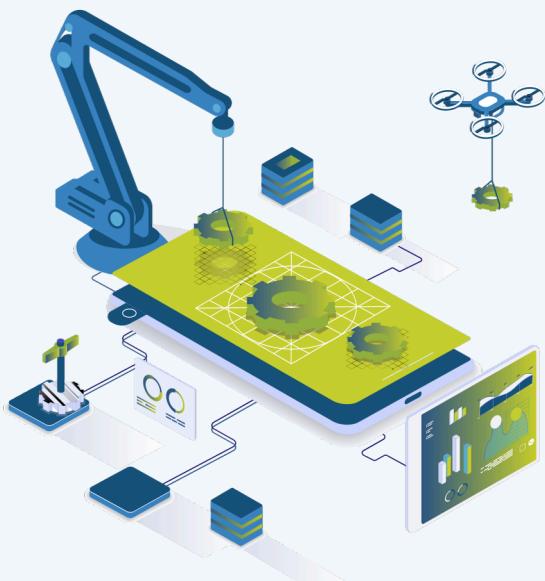
Early identification of easily addressable issues—obvious to you or discovered during the initial review—provides immediate value while building trust with your technical health check team.

THE 3 PHASES OF A TECHNICAL HEALTH CHECK



Phase #2

After gathering all necessary information, the next phase focuses on analyzing the findings and preparing detailed documentation. This step transforms raw data and observations into actionable insights that guide decision-making. The key components of this phase include:



Creating a Comprehensive Report or Slide Deck: The deliverable for this phase is typically a document or slide deck tailored to your needs. This report summarizes the findings and provides a clear roadmap for addressing issues.

Outlining Inefficiencies and Defects: This document highlights specific areas where the system is underperforming or not meeting its potential. These may include technical inefficiencies, operational bottlenecks, or defects affecting functionality.

Providing Recommendations for Improvement: Each identified issue is accompanied by practical recommendations for addressing it, which are aligned with your business objectives and technical constraints.

Prioritizing Remediation Efforts: A prioritization framework is included to help you focus on resolving the most critical issues first. This ensures that limited resources are allocated effectively and that urgent problems are addressed promptly.

THE 3 PHASES OF A TECHNICAL HEALTH CHECK



Phase #3

The final phase involves acting on the recommendations outlined in the analysis and documentation phase. While this phase is optional, many clients choose to proceed with remediation to address the issues identified. Key aspects of this phase include:



Resolving Critical System Problems:

Immediate attention is given to resolving high-priority issues affecting system performance or reliability.

Removing Outdated or Redundant Data:

Data: Efforts may involve cleaning up old data that is no longer used but continues to take up valuable system resources.

Optimizing Workflows:

Workflow improvements focus on enhancing efficiency and ensuring the system effectively supports your business processes.

Improving Operational Documentation:

This phase may include creating or updating an operations guide if existing documentation is incomplete or outdated. This provides a clear understanding of how your system works and how to maintain it moving forward.

Collaborative Prioritization:

You play a central role in deciding which issues to address based on your budget, time constraints, and business priorities. This collaborative approach ensures that the remediation efforts align with your immediate and long-term goals.

C O S T S

Canidium offers a flat fee of \$10,000 for an Xactly Technical Health Check

In some cases, organizations choose to expand the scope beyond the technical review to include a broader process assessment (for example, evaluating how compensation operations are run across teams, systems, and workflows).

When these service expansions are included, **pricing can vary depending on the size and complexity of the organization—and whether we're assessing compensation only, or additional related processes as well.**



DETERMINING YOUR XACTLY TECHNICAL HEALTH CHECK ROI

Your ROI is not just a product of Xactly itself. The margin of improvement within your organization's current infrastructure problems, sales cycle potential, and external market volatility all impact potential revenue growth, just to mention a few factors at play.

As a result, no singular figure covers all business scenarios. That said, it is possible to estimate your potential ROI based on your understanding of how your organization fits into the costs and benefits of optimizing your Xactly system.

Xactly and [Salesforce](#) commissioned Forrester Consulting to perform a [Total Economic Impact \(TEI\) study](#) to explore the potential ROI of [Xactly Incent](#).

The [study](#) found that the composite organization representative of interviewed **companies that use Xactly Incent experienced an ROI of 328% over three years**.

Moreover, the research yielded the following results:

- **Efficiency:** 60% decrease in time needed to configure payment plans and calculate commission payments; streamlined process due to integration with Salesforce
- **Accuracy:** 99% payment accuracy; 90% average reduction in overpayments
- **Productivity:** Reduced payment inquiries and disputes by 83% with 24/7 visibility into performance & expected commissions.

If your Xactly solution isn't offering these returns, consider the margin of improvement available to you. A technical health check is the first step to achieving these figures.

**ESTIMATE YOUR XACTLY
IMPLEMENTATION ROI WITH THE
COMPLETE GUIDE TO WEIGHING THE
COSTS AND BENEFITS.**



WHERE TO GO FROM HERE

With ROI quantified and fixes identified, **the final consideration is minimizing risk during implementation.**

Even small adjustments to incentive logic, workflows, or integrations can disrupt payouts, cause frustration, or slow adoption if they aren't carefully managed.

Organizations that succeed at this stage invest in structured planning, cross-functional alignment, and the right external guidance. **Our Xactly optimization and implementation experts work alongside Sales, Finance, and IT teams to ensure that adjustments are executed efficiently, risks are mitigated, and long-term governance is established.**



Have Questions? Email our experts for quick answers