

VISIONARY IMPLEMENTATION CASE STUDY: BUILDING A SMARTER PATH TO SALES

PERFORMANCE WITH XACTLY

Imagine a world where sellers know exactly where they stand, operations manage compensation with ease, and executives have a clear line of sight into performance and cost. With Xactly's platform and Canidium's implementation expertise, organizations can replace complexity and doubt with transparency, trust, and measurable results.

The Problem:

Many organizations find themselves **trapped** in a cycle of sales performance challenges that hinder growth. On the sales side, teams often face:

- **High turnover rates** driven by frustration with pay and lack of clarity.
- Complicated compensation plans that few people truly understand.
- **Little to no transparency** for sellers into how they are performing against plan.

Meanwhile, the operations side struggles just as much. Compensation administrators are left to manage plans using error-prone Excel spreadsheets, creating bottlenecks, disputes, and extra workload at every payout cycle.

Consequently, leaders in finance, sales, and the C-suite lack confidence in the numbers, limiting the use of compensation as a valid driver of strategy.



The Solution: Xactly + Canidium's Implementation Approach

This visionary case study imagines how Xactly can transform those challenges into opportunities. By partnering with Canidium for implementation, organizations can align people, processes, and platforms in a way that creates measurable impact for:

- Sales Operations & Finance streamlined administration, governed payouts, and confidence in reporting.
- Sales Teams & Leaders real-time visibility into performance, simpler plans, and more trust in the system
- Executives a strategic lens into how compensation impacts growth, margins, and retention.



Tackling Challenges Head-On

Total Cost of Ownership & Training

When evaluating a new compensation platform, one of the first questions that comes up is total cost of ownership. You need to account for more than just the licensing fee; you have to understand how usable the tool will be, how quickly your team can get up to speed, and what it takes to sustain success once your consultants leave.

With Xactly, usability isn't an afterthought. **The platform is designed for scale, but mastering it still requires investment.** That's why <u>Xactly University</u> offers a library of structured learning resources, and why Canidium integrates training directly into every step of the implementation. From UAT preparation to Operations Guide creation to Go-Live hypercare, clients aren't just handed a system — they're equipped with the skills to run it.

The level of readiness at Go-Live depends on commitment. Clients who dedicate time and accountability to training can have administrators fully capable of owning the tool on Day One. However, the reality is that not every team can commit the same level of time and focus. That's why Canidium builds in flexibility: if challenges arise or workloads spike, Canidium remains a safety net, stepping in with expertise to keep projects on track.

Ensuring Success

It's important to be clear-eyed.

Xactly is highly user-friendly, but it isn't a push-button solution that does everything for you.

Compensation is inherently complex, and no platform can eliminate that complexity entirely.

What Xactly and Canidium do is make it manageable, transparent, and scalable. Success comes from partnership, the technology plus the client's commitment, reinforced by a proven implementation methodology.



TOTAL COST OF OWNERSHIP: PHASED IMPLEMENTATIONS AND CHANGE MANAGEMENT

Phased Implementation Approach

During the discovery phase, it's common for clients to want everything on day one: advanced reporting, complex plan modeling, Al-driven insights, and more. But the realities of budget, timelines, and internal bandwidth can derail an all-at-once implementation plan.

Canidium helps organizations balance these competing priorities through a phased implementation approach. Instead of overloading the project with every possible feature, the team works with clients to define what's essential to achieve immediate value and what can be layered in later. This sequencing reduces cost pressures, keeps implementation on schedule, and sets a clear path for future growth.





We often see clients who want everything Xactly has to offer. However, part of Canidium's role is helping clients narrow the scope to fit within a budget and timeframe that works, while still planning for future expansion.

This practical mindset reflects Canidium's broader thought leadership on phased approaches: start with the capabilities that deliver the highest impact today, then expand with confidence once the foundation is in place. By doing so, clients gain value quickly without sacrificing long-term vision.

Change Management & Adoption

Even with the right technology and implementation plan, projects can stall if users don't adopt the system. Sales rep adoption can make or break success. If reps don't trust the numbers or find the tool too difficult to use, the investment never delivers its full potential.

That's why **Canidium builds change management into its delivery methodology.** Training administrators and setting up processes is only half the battle. The other half is preparing sales teams, managers, and leaders to embrace new ways of working. This includes addressing what sellers will need to relearn, how leaders will communicate the change, and what accountability looks like on a day-to-day basis.

While Canidium provides guidance, workshops, and best practices, true adoption also depends on the client's leadership. Executives and managers must reinforce the value of the new system, hold teams accountable for its use, and establish trust in the data. In other words, Canidium's role is to make that transition easier, but the responsibility for adoption is shared.

This combination of support and accountability ensures that when the system goes live, it isn't just technically successful, it's also widely adopted by the people who rely on it every day.



IMPLEMENTATION OVERVIEW

Xactly implementations typically run 12–15 weeks. Success requires collaboration across roles, including:

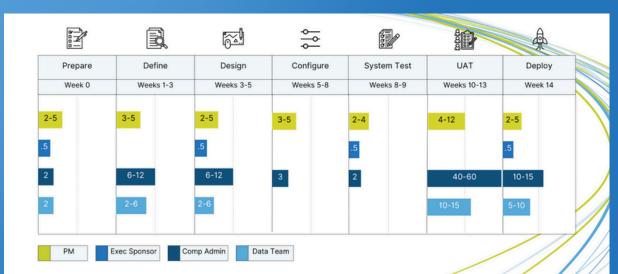
- Client Project Manager to coordinate stakeholders.
- Executive Sponsor to secure buy-in and remove roadblocks.
- Client Administrator(s) to learn the tool and own it post-go-live.
- Sales/Finance Stakeholders to validate requirements and provide input.

A successful project isn't just about technology; it's a team sport. Each role plays a critical part, from admins who must dig deep into the system to executives who must remain engaged in steering decisions.



How Much Time Will You Commit?

Hours by role:





DETERMINING YOUR XACTLY ROI

Your ROI is not just a product of Xactly itself. The margin of improvement within your organization's current sales cycle, the potential earnings from your sales strategy, 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 an implementation. However, before diving into the factors that impact your ROI, it helps to have a benchmark against which you can measure your prospective returns.

Xactly and <u>Salesforce</u> commissioned Forrester Consulting to perform a <u>Total Economic Impact</u> (<u>TEI) study</u> to explore the potential ROI of <u>Xactly Incent</u>.

<u>The study</u> 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.

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





POST-IMPLEMENTATION

WHAT XACTLY LOOKS LIKE IN PRACTICE

A successful Go-Live is only the beginning. Incentive compensation management is not static—markets shift, strategies evolve, and compensation plans must keep pace. Xactly's platform continues to expand, adding innovations such as Al-powered insights, automation, and Xactly Extend applications that streamline processes even further.

Sustaining ROI requires two things: adoption and iteration.
Adoption ensures that sales teams and administrators use the tool to its fullest potential; iteration ensures that new features, plan adjustments, and organizational changes are incorporated smoothly. Canidium supports both.

With training programs, operational guides, and structured change management, Canidium helps clients maximize adoption rates. And through optional Managed Services, clients can access extra expertise or bandwidth whenever they need it —whether to handle a complex plan redesign, add integrations, or simply free up their internal team's time.



Driving Growth With Xactly

Xactly won't solve every challenge automatically. Compensation will always be complex, but with the right partner and methodology,

the platform and continuously capture value. The journey doesn't end at Go-Live, it compounds over time, turning compensation into a true lever for sustainable growth.