BLUE HORIZONS



BLUE ADVISE™ CASE STUDY

Fostering Transparency and Trust

Challenge

A large US software company that provides enterprise-grade data solutions was experiencing a loss of trust from their sales team, high sales force attrition and was struggling to attract top sales talent. Their sales team also lacked transparency into incentive payments and processes.

Engagement

They engaged Blue Horizons Group (BHG) to conduct an evaluation of existing sales compensation plans, business processes, and ICM systems. Using our proprietary **Future State Design Workshop**™ framework, BHG performed a detailed assessment of their incentive plan inadequacies, business process gaps, and system bottlenecks.

Assessment

The BHG team conducted a deep dive into the understanding of the client's challenge. We conducted detailed interviews of the global sales team (managers and directors) as well as reviewed pertinent documentation for:

- **Plan design complexity and effectiveness**
- **Sales and quota planning cycles**
- **Business processes inefficiencies**
- **ICM systems integration**
- **Data quality and timeliness**

SALES MANAGEMENT FINDINGS

During our assessment of their current state the team found that the sales team was experiencing a lack of morale due to:

Unnecessary complexity within plans and plan documentation

Frequent Changes in sales and quota goals

Lack of timely visibility of payout information

These issues reduced understanding of and faith in plans, drove undesirable behaviors, and led to shadow accounting activities reducing sales team performance.

With further assessment, it was discovered that many of these issues were underpinned by an inadequate and inflexible ICM system.

TECHNICAL FINDINGS

After conducting a deep dive into the current ICM system the team found compensation data and operations are impacted by labor-intensive, time-consuming integrations and processes.

Delayed visibility into potential and actual pay due to delays with data feeds from upstream systems.

Lack of key capabilities in the existing ICM system led to manual and error prone processes.

RECOMMENDATIONS

The BHG team provided specific and in-depth recommendations on:



- Restructuring incentive plans that were less confusing, easier to understand
- Restructuring sales planning and quota setting cycles
- How to make the current ICM system the single source of truth for compensation data and processes
- Moving to a daily integration process for timely and systemic data updates

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DELIVERABLES

At the end of the engagement, the client received:

- PROJECT SCORECARD
- CURRENT STATE REPRESENTATION AND FINDINGS DOCUMENT(S)
- FUTURE STATE REPRESENTATION AND RECOMMENDATIONS DOCUMENT(S)
- SALES DATA ROADMAP

IN SUMMARY

Prior to engaging with BHG, the client was unaware of the reason there was a lack of trust and high attrition rate within their sales team. Using BHG advisory services the client was able to uncover specific issues within sales management, plan design, and ICM system infrastructure. They have taken many of our recommendations to improve their sales and compensation team experience.

