

SALES PERFORMANCE MANAGEMENT

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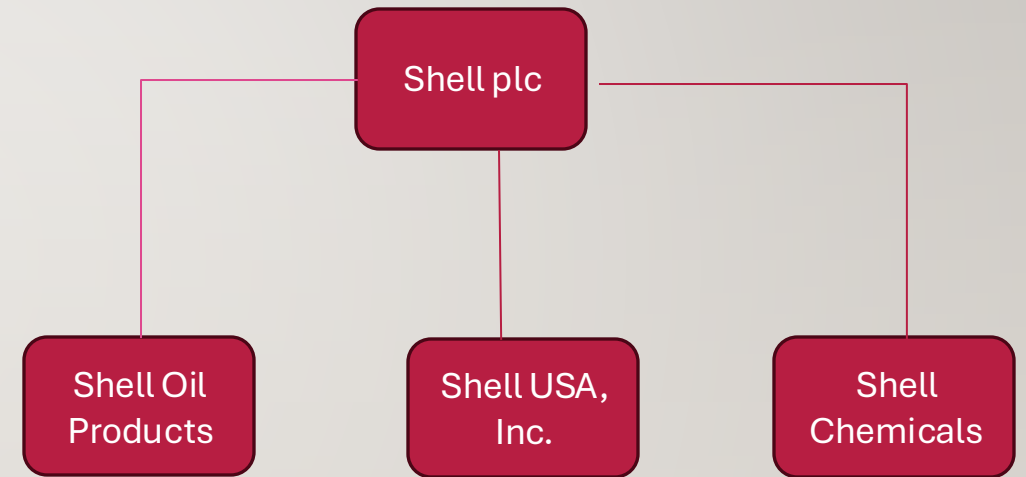
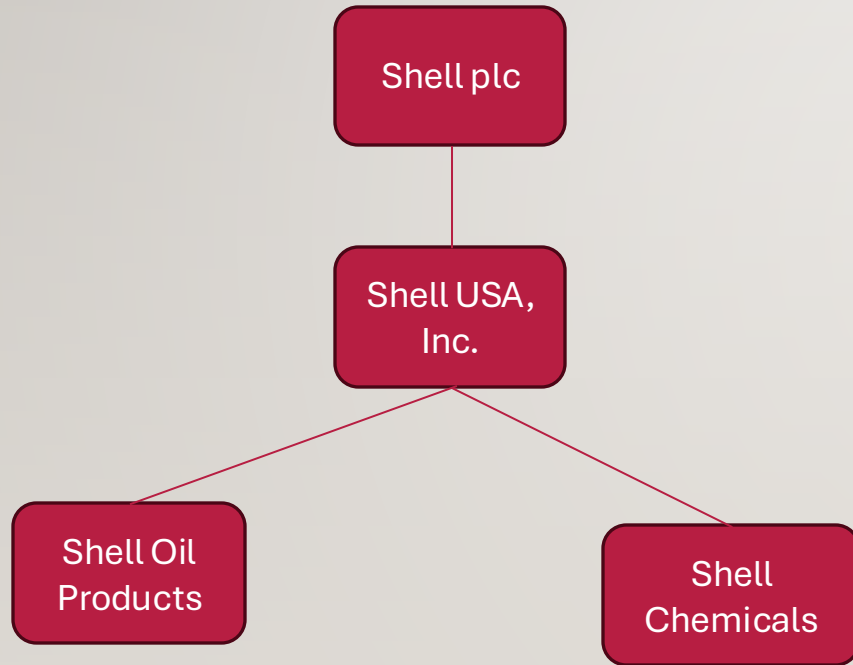
BACKGROUND

- Sales performance program heavily rely on data from CRM,MDM , ERP and various third-party systems

Key business functions

- Customer structure definition (From legal org structure)
- Sales Commission & Partner Incentives Calculation
- Sales Finance Reporting
- Sales Forecasting
- Sales Strategy & Portfolio Optimization

SAMPLE HIERARCHY

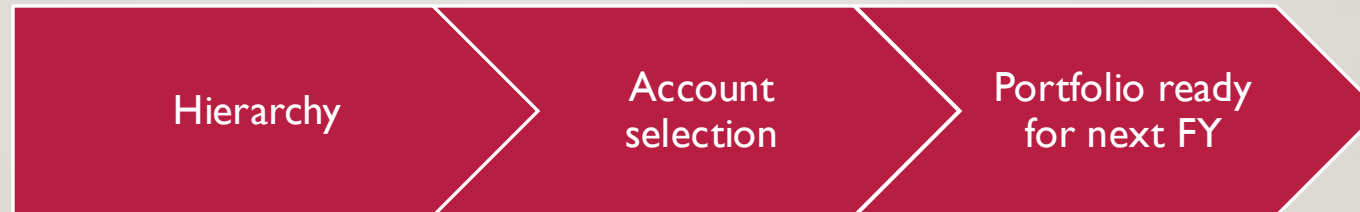


SAMPLE SALES PORTFOLIO

	Sales rep 1		Sales rep 2		Sales rep 3
Energy	Shell plc	Construction	Reliance	Retail	Reliance
	BP		L&T		Aditya Birla
	Chevron's		GMR		Spencer's
	Marathon Oil		Jaypee		V-Mart
	AMER		APAC-INDIA		APAC-INDIA

PHASES

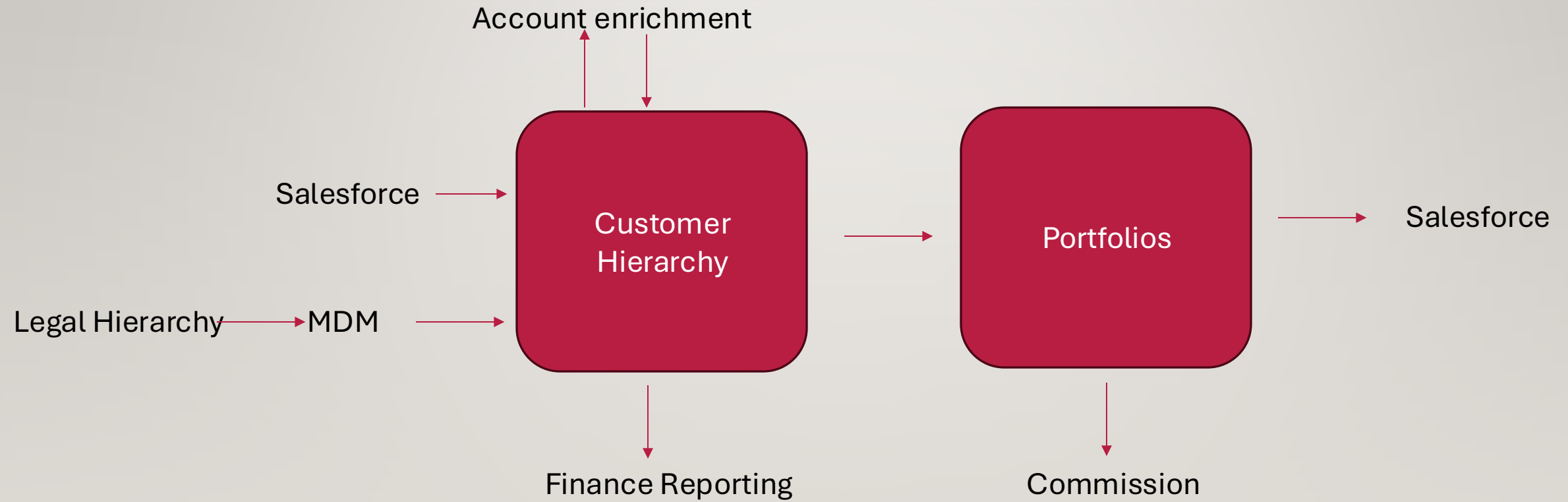
- Planning
 - Create customer structure and portfolio for next FY
- Current
 - Current customer structure and portfolio sales team execute the business



SEGMENT SAMPLE

Segments	Country/GEO	Billing
Named account	USA/CANADA/JP	50M
Mid Market	USA/CANADA/GERMANY	30M
Strategic Mature	SINGAPORE/CANADA	20M
Strategic Emerging	INDIA	10M

DATA FLOW



PROBLEMS

- Sales rep find unintended changes in the sales portfolio leading the missing sales commission and seller dissatisfaction
- Sales reps spent excessive time correcting data rather than selling.
- Manual case creation processes and data corrections were time-consuming and inefficient.
- Inaccurate data resulted in poor sales finance reporting and unreliable forecasts
- No transparency on customer hierarchy and portfolio changes for sales rep and sales managers

CHALLENGES

- Uncontrolled data attribute changes in upstream systems
- Disconnected systems leading to inconsistent account data.
- Incomplete account data
- Incomplete / no legal hierarchy information from 3rd party
- Presence of duplicate accounts with billing in portfolio

KEY STAKEHOLDERS

- Sales Commissions team
- Sales Finance team
- Sales Strategy & Planning
- Sales Execution team
- IT and Data Engineering teams
- Enterprise data management team

OBJECTIVE

- Empower sales teams to focus on selling by establishing a trusted and consistent customer structure and portfolio
 - Guarantees portfolio stability by eliminating unintended changes.
 - Reduces manual interventions through case creation and automated workflows.
 - Enables real-time transparency on customer hierarchy and portfolio changes
 - Improve sales time for selling,

KEY RESULTS

- Reduce duplicate customer records by 100% in the enterprise data platform
- Achieve 100% alignment between legal hierarchy and derived/custom hierarchy in the platform
- Ensure 100% customer record consistency across sales portfolios
- Increase sales team satisfaction score related to portfolio accuracy to 80%
- Reduce hierarchy and commission adjustment cases caused by data errors to 90%

APPROACHES

-
- Review on the previous FY pain point and problem and present RCA (Workshops)
 - Discussion on the new business model
 - Identify key features with new business model
 - Alignment between Architecture with business stakeholders
 - Cross functional team alignments (RACI)
 - Define Product Vision, Roadmap & Dependencies
 - Define success Metrix
 - Solution design
 - MVPs
 - Rollout and change management (feedback loop)
 - Measure and optimize

SOLUTION OVERVIEW

- **Accurate hierarchy and unintended changes (Policy)**
 - Reengineer the existing customer hierarchy and portfolio creation based on new policy (account merge , locking period during planning)
 - Establishing policy on account merges
 - Establish locking mechanism during during portfolio checks
 - Exception process by approved CR

SOLUTION OVERVIEW

- **Upstream data and Access control**

- Enforce access control in salesforce system
- Ensure the legal hierarchy match with customer hierarchy
 - Any accounts that doesn't have legal hierarchy , then align accounts matching with website information / address information under same parents
 - Review the hierarchy and automate the process
- Search before create
- Deduplicate of customer data / reduce parallel hierarchy / orphan hierarchy
- Archive unused customer records

SOLUTION OVERVIEW

Hierarchy and portfolio change visibility

- Real-Time Sales Dashboards in Power BI
 - Between Planning and Current
 - YTD changes
 - Impacts
- Customer hierarchy data lineage and portfolio change detection

Governance and operation efficiency

- Establish the data governance(data ownership , stewardship , custodian, governance council)
- Automate the case creation and change request workflow

EXECUTION PLAN

- Discovery
 - Workshops , pain points , high level solutions , prioritization , road mapping ,
- Customer hierarchy policy review
- Gap analysis between base solution and target solution
- Solution walkthrough
- Development execution
- Data analysis with new solution and identify and monitor the improvement
- Changes in the hierarchy structure and portfolio changes with respective sales manager
 - Power BI dashboards on customer structure and portfolio between FY with impact
- Review and feedback
- Roll out
- Support and continues improvement

Discovery

Roadmap

Design
and Dev

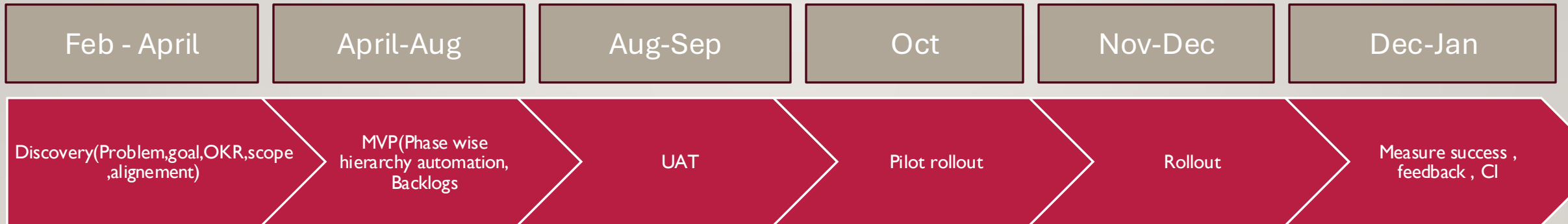
MVP

Feedback

Release

EXECUTION PLAN (REENGINEERING)

FY26



Finance
switch

KPI

- Duplicate customer hierarchy rate
- Hierarchy matching accuracy
- Portfolio stability rate
- Commission cases
- User satisfaction score

IMPACTS

- Reduced unintended accidental hierarchy changes by 100%
- Reduced the duplicate hierarchy by 90%
- Reduced sellers time on data correction by 80%
- Number of cases related to hierarchy reduced by 90%
- Sales rep satisfaction score increased and satisfaction rate 80%
- Improved sellers time from data correction

Q&A

ENTERPRISE INTEGRATION AND DATA HUB



BACKGROUND

- Multiple system involved and data was scattered between the systems
- Absence of cloud
- Integrations were largely point-to-point, resulting in a complex, fragile, and high-maintenance architecture

PROBLEM

- Absence of single data source
 - Users / end application not sure about data and its origin
- Data inconsistencies across systems impacted reporting, forecasting, and decision-making accuracy
- Inaccuracies in sales commission and partner incentive calculations caused deviations, resulting mistrust.
- Point-to-Point Integrations
 - Complex and fragile integration landscape
 - High dependencies on the systems

PROBLEM

- Absence of Cloud Infrastructure
 - On-premise systems with limited scalability
 - High maintenance costs
- Lack of data governance

CHALLENGES

- Legacy systems with siloed data repositories
- Lack of metadata management and data lineage tracking
- Establish alignment with stakeholders
- Onboarding the technical expertise

KEY STAKEHOLDERS

- Sales Commissions team
- Parter incentive team
- Sales analytic team
- Data Stewards and Governance Committee
- IT & Data Engineering Teams

OBJECTIVE

- Establish a reliable and scalable Enterprise Data Platform as the single source of truth
- Improve data quality, governance, and consistency across business domains.
- Enhance data accessibility and user adoption for business teams
- Ensure accurate and reliable sales commission and incentive calculations
- Improve consistency across systems to enhance forecasting and reporting

KEY RESULTS

- Integrate 100% of relevant sales-related systems (CRM, ERP, MDM) into a unified data platform
- Achieve 90%+ user adoption of the central data platform across all consuming applications
- Decommission 80% of legacy data sources currently used for reporting.
- Reduce discrepancies in sales commission and incentive payout by 90%
- Increase sales and partner satisfaction score by 30%.

APPROACHES

- Defined architecture vision that aligned to organization goal
- Aligned architecture vision and business architecture and agreed with stakeholders
- Identify the domain data sources
- Evaluate the tools and technology for data integration and DW in cloud
- Solutioning
- Migration plan
- Governance
- Development
- MVP
- Roll out
- Support , measure , improve

SOLUTIONS

- Enterprise data platform integrating data across multiple domain, sales, finance, and operations.
 - Single source of truth
 - Connected different system and ingest the data
 - Data governance in place with data quality , accuracy , consistency , compliance , trust
- Established data quality rules and alerts
- Customized integration adapters for faster integration and for uniform standard
- Self service portal

EXECUTION PLAN

Product vision

Architecture
vision

Business
architecture

Data
architecture

Technology

Solutional and
design

Migration plan

Implementati
on

Rollout and
improvement/
CM

Phase 1 – Enterprise Integration Hub for Sales Performance domain

Phase 2 – Enterprise Data Hub for organization , all domain

KPIS

- % of data domains consolidated in one platform
- Number of active consumer application
- % of data quality issues
- Data availability time
- User satisfaction score
- % of reports matching source truth
- % saving in the integrations

IMPACTS

- Minimized errors in downstream applications, financial reporting, and commission calculations, strengthening business confidence in data-driven decisions
- Ensured 99.9% data availability for all critical customer datasets, enabling reliable and timely business insights.
- Improved data quality score to 90%+, ensuring accuracy, completeness, and consistency across key domains.
- Automated detection of 95% of data quality issues through advanced validation rules
- Accelerated data integration by 60%, boosting delivery speed for downstream systems and analytics.
- Reduced duplicate data by 90%+, significantly improving customer master accuracy and operational efficiency.

Q&A

PARTNER ONBOARDING



BACKGROUND

- Partners placed orders manually, resulting in inconsistent processes and delays.
- There was no self-service capability or system to place or track orders.
- Partners had no visibility into order status or fulfillment timelines, leading to frequent inquiries and dissatisfaction.
- Product access post-order typically took 48+ hours, impacting customer experience and downstream business operations.
- The organization aimed to adopt a phased approach to modernize the ordering process, aligning with a new business model and long-term digital transformation vision.

PROBLEM

- Lack of visibility into order status, causing partner frustration and increased support overhead.
- Long lead times for order placement and processing, delaying business transactions.
- Product access was delayed by more than 48 hours post-order, negatively impacting customer satisfaction and delivery timelines.
- Risk in customer attrition, limiting the organization's ability to scale and onboard new customers efficiently.
- A strategic roadmap was needed to transition toward a scalable, service-driven business model aligned with long-term growth and digital transformation objectives.

KEY STAKEHOLDERS

- Partners (Resellers)
- Customer success team
- Finance team
- Client service support team
- Partner Incentive team
- IT and Engineering team

OBJECTIVE

- Improve end-to-end visibility into order status for partners and internal teams
- Reduce order led times to improve business agility
- Accelerate product access post-order to enhance customer experience
- Mitigate customer attrition and scale onboarding capacity
- Develop and execute a strategic roadmap for a service-driven, scalable business model

KEY RESULTS

- 100% visibility for partners on the order status
- Decrease average order placement-to-processing time by 90%
- Reduce time-to-product-access post-order to under 1 hour
- Improve customer satisfaction (CSAT) score by 25% post-order

APPROACHES

- Deep-dive analysis of the end-to-end order lifecycle.
- Identified bottlenecks and manual dependencies.
- Conducted stakeholder alignment workshops to map current pain points vs. future state vision.
- Reengineer the existing solution and check for delay in the product access
- Partner Web Service – provide APIs for partners to place order (both transactional and informational services)
- Defined MVP for order status visibility and self-service capabilities
- Phased rollout aligned with business model transition strategy.

SOLUTION OVERVIEW

- Developed an Order Management Service Layer (PWS) enabling real-time order placement and status updates.
- Introduced Partner Self-Service Portal for transparency and reduced manual interactions.
- Established a data-driven dashboard for internal teams to monitor order status and exceptions.

EXECUTION PLAN

- Rollout of MVP: Order status visibility and basic self-service capabilities – Informational service
 - GetPrice
 - OrderStatus
- Transactional service with selected partners as pilot
- Review and improvement
- Rollout of informational and transactional services in AMER , EMEA and APAC
- Post rollout support , measure and improve

KPIS

- Number of support tickets related to order status
- Average lead time per order
- % of orders processed same day
- % of orders auto-routed without manual intervention
- Average time from order to product access
- Customer Satisfaction score

IMPACTS

- Reduced order processing time from 48+ hours to minutes (phase wise approach)
- Increased partner satisfaction through real-time visibility and reduced support overhead by 50%.
- Accelerated new partner and customer onboarding and reduced attrition risk
- Laid the foundation for scalable growth via the service-driven business model

Q&A

DATA PLATFORM OKRS



OKRI

- Establish a reliable and scalable Enterprise Data Platform as the single source of truth.

Key Result

Achieve 99.9% data availability for all critical customer datasets.

Target

≥ 99.9% uptime

Reduce duplicate customer records in the platform to 0%.

100% deduplication

Ensure 100% alignment between legal hierarchy and custom sales hierarchy.

100% mapping accuracy

OKR2

- Improve data quality, governance, and consistency across business domains.

Key Result

Target

Achieve a minimum of 99.5% data quality score (accuracy, completeness, consistency).

≥ 99.5%

Detect and resolve 95% of data quality issues automatically via validation rules.

≥ 95% resolution via automation

Enforce 100% data lineage visibility for customer-related datasets.

100% lineage coverage

OKR3

- Improve data quality, governance, and consistency across business domains.

Key Result

Reduce average time to access or locate customer data by 50%.

Increase adoption rate of the new platform by downstream systems (CRM, Sales, Marketing).

Achieve user satisfaction score of 90%+ for data availability and usability.

Target

≥ 50% reduction

≥ 90% adoption

≥ 90% satisfaction