

# OpenSymmetry

Performance. Innovation. Whatever it Takes.



## 2014 SPM Vendor Guide

A Comprehensive List of Sales Performance  
Management Vendors and Solutions

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# Background & Purpose:

*An introduction to the leading SPM suppliers*

Sales Performance Management (SPM) has taken on a new role in sales organizations; the focus has changed from just compensating sales reps to a more holistic approach, from onboarding resources to the management of territories and quotas all in one system. These applications help enterprises improve the organization, direction and motivation of sales teams to achieve sustained improvements in revenue and margin production.

With dozens of SPM solutions existing on the market, selecting the right one for your needs can be a complex and time-consuming task. This guide was prepared by OpenSymmetry to provide an introduction to the leading suppliers of sales performance management systems and incentive compensation automation tools. The information contained in this document has been gathered from official corporate websites.

The SPM software vendors included in this review were selected based on their client base, corporate recognition and contribution to the field of SPM. Each has significant qualities within their services or software that should be

reviewed when making a decision on the purchase of a solution.

Inclusion of vendors in this guide does not constitute endorsement or recommendation of any listed vendors. We have not evaluated, pre-qualified or certified these vendors in any way. OpenSymmetry is a global sales performance management (SPM) consulting firm delivering end-to-end performance management solutions consisting of both strategic and technical services that enable customers to transform their sales performance solutions into actionable results.

## DISCLOSURE NOTE

OpenSymmetry is an integration partner with the following sales compensation software companies:

ANAPLAN • BEQOM • CALLIDUS CLOUD  
• NICE • IBM • XACTLY

# About OpenSymmetry

OpenSymmetry is a global sales performance management (SPM) consulting firm delivering end-to-end performance management solutions consisting of both strategic and technical services that enable customers to transform their sales performance solutions into actionable results.

Founded in 2004, OpenSymmetry is headquartered in Austin, Texas with offices in London, Sydney, Johannesburg, Kuala Lumpur, and Chennai. Clients range from SMB to Fortune 500 companies in the Communications, Financial, Health/Life Sciences, and IT/Distribution industries.

## Common business problems we help our clients address:

- » Sales compensation strategy and alignment
- » Program modeling and costing
- » Incentive plan design
- » Change management
- » Future State definition
- » Implementation Readiness
- » Job role definition
- » Process benchmarking and improvement
- » Solution targeting and selection
- » SPM requirements planning
- » SPM software implementation
- » Sales data consolidation and analysis
- » Custom sales tool development
- » Global project coordination and support
- » Ongoing administration and technology management
- » Resource augmentation
- » Business process and software training

# SPM Highlighted Vendors

	BI	Assessment/ Coaching & Training	ICM	Sales Process / CPQ	Territory/ Quota
Adaptive Insights	✓		✓		✓
Anaplan			✓		✓
Apptus				✓	
Aurea Insurance Solutions			✓		
beqom			✓		✓
BigMachines				✓	
Callidus Cloud		✓	✓	✓	✓
IBM Cognos	✓	✓	✓	✓	✓
ICONIX			✓		✓
Microsoft	✓				
Miller Heiman		✓			
NICE		✓	✓		✓
Optmyze	✓	✓	✓	✓	✓
Oracle			✓		✓
ProAlign			✓		✓
Sandler		✓			
SAP BusinessObjects	✓				
Syngy	✓	✓	✓	✓	✓
TerrAlign					✓
Xactly	✓	✓	✓		✓

# Coverage Definition

<b>Business Intelligence</b>	Use of analytics to understand external and internal performance to inform future practice and design decisions. Also, the level of reporting to stakeholders (salespeople, managers, executives, administration) on sales performance.
<b>Candidate Assessment &amp; Onboarding</b>	Optimal organization structuring, effective targeting and recruiting of sales talent using online selection tools. Also, the efficient and accurate onboarding of new hires
<b>Coaching &amp; Training</b>	Includes both the formal and informal processes for performance review and feedback to ensure sales staff perform to their potential. Helping employees to develop the skills and competencies necessary for them to excel. This component covers both formal technical or behavioural training and informal development through, for example, coaching and self development.

<b>Sales Comp Admin &amp; Design</b>	Designing incentive plans including scenario modeling and stress testing. Includes the use of short term incentives/ SPIFFS and other aspects of recognition e.g. President's Club. Process by which sales commission is calculated and paid, disputes resolved.
<b>Sales Process</b>	The formulation and development of a strategy in order to attain sales objectives and the process for managing lead generation, pipeline progression, and Statements of Work (SOWs).
<b>CPQ</b>	The formulation and development of a strategy in order to manage Configure, Price, and Quota process and documentation.
<b>Territory &amp; Quota</b>	Managing the geographical area or type of customers (industry/size/channel) assigned to a sales team or person. Setting and managing the sales targets for salesperson, team or region for a specified period of time. Potential targets can include revenue, gross profit, account growth, for example.



## SPM WIDE SOLUTIONS

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*The following vendors provide functionality across  
the sales performance management spectrum*

# Adaptive Insights

(Formally Adaptive Planning)

Adaptive Insights is the world's #1 cloud planning, forecasting, and analytics solution used by 2,000 organizations in 85+ countries.

Leading organizations like DocuSign, Boston Scientific, and NBC News use Adaptive to plan more effectively, collaborate more efficiently, and visualize business performance anytime and anywhere. Adaptive is the #1 fastest-growing cloud business analytics and CPM company according to Deloitte, has the #1 brand in mid-market CPM, and ranks #1 in customer satisfaction and usability in independent industry surveys.

Optimize your investment in your Salesforce solution and streamline your forecasting, quota planning, analytics and reporting with Adaptive Insights, all integrated with Salesforce. Our Sales Planning drives operations productivity, improves forecast accuracy, accelerates quota planning, and powers alignment between Sales and Finance.

**POWERFUL SALES FORECASTING:** Makes calculating the forecast easy based on Salesforce opportunity amounts, units, or custom metrics. Model and compare various scenarios using different rates or detailed business drivers.

**SMARTER QUOTA MANAGEMENT:** Streamlines the quota planning process, with the power to set bottom-up quotas or top-down allocations aligned with revenue goals and headcount, and the flexibility to assign team-based or individual quotas.

**COMPREHENSIVE SALES ANALYTICS:** Full-fledged dashboards and analytics on sales opportunities, actual vs. sales plans, quota information, forecast, and more.

**COMPLETELY INTEGRATED:** Easily import data from Salesforce such as leads, opportunities, customer wins, and rep compensation details - and access Adaptive from a tab in Salesforce.

## COVERAGE

BI • CANDIDATE ASSESS & ON-BOARDING • COACHING & TRAINING • CPQ • SALES  
COMP ADMIN & DESIGN • SALES PROCESS • TERRITORY & QUOTA

## COMPANY INFO

**DATE FOUNDED:**  
2003

**LOCATION:**  
Palo Alto, CA

**PHONE:**  
1-800-303-6346

**EMPLOYEES:**  
250+

**REVENUES:**  
N/A

**WEB:**  
adaptiveinsights.  
com

**SERVICES:** Implementation, training and support services

**DELIVERY MODEL:** Software as a Service / Cloud

**TOTAL # OF PARTICIPANTS:** 2,000 customers

**CLIENT BASE:** Across all industries e.g. Software, Manufacturing, Healthcare, Nonprofit/Education, Financial Services

**MANAGED SERVICES:** No

**TRAINING:** Training and certification program for customers & partners

**SUPPORT:** 24 x 7, free support plus additional premium support packages are available for an annual fee

**SOLUTIONS:** Integrated BI & CPM Suite in the Cloud

**PRODUCTS:** Adaptive Planning, Sales Planning, Adaptive Discovery, Adaptive Consolidation, Adaptive Reporting, Adaptive Integration

# Anaplan

Anaplan is a leading provider of cloud-based, in-memory business modeling and planning solution for sales, operations, and finance.

Anaplan's platform was built from the ground up to empower companies to plan, collaborate and act—in real-time. It enables high performance analytics, modeling, forecasting, planning, and reporting in an enormously powerful online architecture that's capable of scaling to meet the needs of the world's biggest organizations. The result is a platform that performs at an order of magnitude faster than traditional on-premise and 1st generation SaaS systems. Anaplan's unique architecture uses modules which inherently connect cross-functional business processes to unite the entire business in one place. Simple one-line commands connect modules and instantaneously process data and calculation impacts across the model. This allows users to quickly and easily build links between processes and functions - sales with finance, marketing with sales, sales with service ops, etc. - offering anyone a 360° view of key drivers and their impact on critical business processes and outcomes.

**Territory and Quota Management:** With Anaplan, Sales leaders can now manage their complex territory and quota intelligently, address coverage gaps and adapt for changes by leveraging real time data from across their business. Anaplan delivers the power, immediacy, connectedness and trusted access to maximize sales and rep productivity. Territory and Quota Management by Anaplan specifically supports the following key business processes:

- Account Segmentation
- Territory Carving
- Sales Capacity Planning
- Quota Planning and Management

## COVERAGE

BI • CANDIDATE ASSESS & ON-BOARDING • COACHING & TRAINING • CPQ • SALES  
COMP ADMIN & DESIGN • SALES PROCESS • TERRITORY & QUOTA

## COMPANY INFO

**DATE FOUNDED:**  
2006

**LOCATION:**  
San Francisco, CA

**PHONE:**  
415-742-8199

**EMPLOYEES:**  
250

**REVENUES:**  
N/A

**WEB:**  
anaplan.com

**AVERAGE # OF PAYEES:** 250 to 30,000+

**PRIMARY MARKETS:** Telecommunications, Retail, Pharmaceuticals, Technology, CPG/FMG, Retail, Insurance, Life sciences, Media and Entertainment, Health Care, Engg and construction

**DELIVERY MODEL:** On-Demand

**TOTAL # OF PARTICIPANTS:** 100,000+

**CLIENT BASE:** 150+

**MANAGED SERVICES:** Yes

**TRAINING:** Yes

**SUPPORT:** 24 x 7, Web forums

**PRICING MODEL:** Subscription based model, license by user

**TECHNOLOGY:** Patented HyperBlock Architecture that combines the best of relational, in memory columnar and cell driven data models to deliver powerful calculation engine on the cloud. Integrations to enterprise systems including salesforce.com

**CUSTOMERS:** HP, Diageo, Pandora, McAfee, Kimberly-Clark, Salesforce, Café Press, Whole Foods

**ADDITIONAL OFFERINGS:** Sales: Commissions, Price and Quote (Deal Desk), Quota Planning, Sales Capacity Planning, Sales Forecasting, Territory Planning, Trade and Promotion.

**FINANCE:** Balance sheet and cash planning, Budgeting, forecasting and reporting, Capital Expenditures, Financial Consolidation, Profitability Analysis, Premium Modeling, Strategic Planning, Workforce Planning

**OPERATIONS:** Demand Planning, Project Planning, Site/Plot Planning

# Aurea Insurance Solutions

(Formally Trilogy Insurance & Financial Services)

Aurea Insurance Solutions was founded in 2013 through a merger with Trilogy Insurance & Financial Services and is still backed by Trilogy Software, one of the largest privately held software companies in the world.

Aurea touts a long history of leadership, innovation and disruptive software solutions utilized by the world's largest insurance companies to design, orchestrate and assure industry-specific, complex business and technical processes.

Aurea Distribution Channel Management (DCM) is a purpose-built solution for the insurance industry that spans the lifecycle of producer management—from on-boarding to compliance to compensation and debts and payments. Their focus is on helping the world's largest insurers accelerate producer productivity and launch new compensation plans and products in an order of magnitude faster than before.

## COVERAGE

BI • CANDIDATE ASSESS & ON-BOARDING • COACHING & TRAINING • CPQ • SALES  
COMP ADMIN & DESIGN • SALES PROCESS • TERRITORY & QUOTA

## COMPANY INFO

DATE FOUNDED:  
1989

LOCATION:  
Austin, TX

PHONE:  
512-201-8287

EMPLOYEES:  
300

REVENUES:  
\$40 Million  
(estimated)

WEB:  
aurea.com

**AVERAGE # OF PAYEES:** 5000 to 100,000+

**PRIMARY MARKETS:** Insurance

**DELIVERY MODEL:** On-Premise or On-Demand

**CLIENT BASE:** 50 (estimated)

**MANAGED SERVICES:** Yes

**TRAINING:** Yes

**SUPPORT:** 24 x 7

**PRICING MODEL:** License and Subscription. Unique, comprehensive, single annual fee model with complete transparency.

**TECHNOLOGY:** Patented, industry-specific software built for today's speed, compliance and high volume requirements

**CUSTOMERS:** American Family, Aviva, Highmark, MetLife, Penn Mutual, Pacific Life, Prudential, United Healthcare, Wellmark

**ADDITIONAL OFFERINGS:** Business Process Management, Data Management, Message Management, Monitoring



# beqom

(Formally Excentive)

beqom, a global company established in 2009 with a direct presence in over 10 countries, provides a Workforce Behavior Management solution used globally across all industry sectors by over 100 large companies such as Microsoft and Vodafone.

beqom's roots are in Compensation Management, which includes Salary Review, Bonus, Long-Term Incentives, Commissions and Non-cash rewards, all key drivers towards Employee Performance and Sales Performance. Sales organizations leverage beqom to drive the behavior of internal and external channels and HR organizations leverage beqom to drive employees behavior globally.

## COVERAGE

BI • CANDIDATE ASSESS & ON-BOARDING • COACHING & TRAINING • CPQ • SALES  
COMP ADMIN & DESIGN • SALES PROCESS • TERRITORY & QUOTA

## COMPANY INFO

### DATE FOUNDED:

2009

### LOCATION:

Weston, CT

### PHONE:

203-557-3691

### EMPLOYEES:

100+

### REVENUES:

N/A

### WEB:

beqom.com

**AVERAGE # OF PAYEES:** 5,000 to 80,000+

**PRIMARY MARKETS:** All Industries - Financial services, manufacturing & retail, technology, communications, public sector

**DELIVERY MODEL:** exclusively cloud based (true multi-tenant, public cloud)

**TOTAL # OF PARTICIPANTS:** 500,000 – 1,000,000

**CLIENT BASE:** 100

**MANAGED SERVICES:** Yes

**TRAINING:** Yes, certification program

**SUPPORT:** Tiered global support, 24/7 local support

**PRICING MODEL:** Subscription

**TECHNOLOGY:** Web-based, using a Microsoft technology stack SQL server, .NET, etc.

**CUSTOMERS:** Microsoft, Fidelity, Bristol-Myers Squibb, BNP Paribas, Mercedes-Benz, PepsiCo, Vodafone, Stryker Corporation, Barclay's, BNP Paribas

**ADDITIONAL OFFERINGS:** Recognition and non-cash awards, objective and quota management, territory management, bonus management, salary review, equity management, reporting analysis, performance calibration, performance appraisal, deferral management

# Callidus Cloud

CallidusCloud®, (NASDAQ:CALD), is the leading provider of sales and marketing effectiveness software.

CallidusCloud enables organizations to accelerate and maximize their lead to money process with their complete suite of solutions that identify the right leads, ensure proper territory and quota distribution, enable sales forces, automate quote and proposal generation, and streamline sales compensation – driving bigger deals, faster. Over 2000 leading organizations, across all industries, rely on CallidusCloud for their lead to money process for better marketing and smarter selling.

## COVERAGE

BI • CANDIDATE ASSESS & ON-BOARDING • COACHING & TRAINING • CPQ • SALES  
COMP ADMIN & DESIGN • SALES PROCESS • TERRITORY & QUOTA

## COMPANY INFO

**DATE FOUNDED:**  
1996

**LOCATION:**  
Pleasanton, CA

**PHONE:**  
866-812-5244

**EMPLOYEES:**  
600+

**REVENUES:**  
\$112+ M

**WEB:**  
calliduscloud.com

**AVERAGE # OF PAYEES:** 100 to 200,000+

**PRIMARY MARKETS:** Financial Services, High Tech, Manufacturing, Life Sciences, Telecommunications, Retail

**DELIVERY MODEL:** On-Demand or On-Premises

**TOTAL # OF PARTICIPANTS:** 8 million+

**CLIENT BASE:** 2100 across all solutions

**MANAGED SERVICES:** Yes

**TRAINING:** Yes, and certification program

**SUPPORT:** 24/7

**PRICING MODEL:** On-Demand: Per payee, per month  
On-Premises: Per payee, per month

**TECHNOLOGY:** Compatible with Oracle, DB2 and SQL Server. Bundled with Business Objects for reporting & Informatica for data integration. SAP powered by NetWeaver. Integrated with Salesforce.com

**CUSTOMERS:** AIG, Comcast, EFI, JPMorgan Chase, Kimberly Clark, Motorola, NBA, Verizon, Zimmer

**ADDITIONAL OFFERINGS:** Marketing Automation, Thunderbridge (Big Sales Data Analytics), Contract Lifecycle Management

# IBM Cognos ICM

(Formally Varicent)

Based on the acquisition of Varicent Software in 2012, IBM Cognos Incentive Compensation Management (ICM) is a highly scalable solution that enables companies to automate the process of calculating, reporting & analyzing variable-based pay.

Tangible benefits are achieved by automating incentive compensation calculations, improving governance and reporting and analyzing sales performance. Also in the IBM portfolio, IBM Cognos Territory Management streamlines the assignment of territories and sales crediting; and IBM Cognos Quota Management brings collaboration, workflow and automation to the process of setting and disseminating sales quotas.

## COVERAGE

BI • CANDIDATE ASSESS & ON-BOARDING • COACHING & TRAINING • CPQ • SALES  
COMP ADMIN & DESIGN • SALES PROCESS • TERRITORY & QUOTA

## COMPANY INFO

### DATE FOUNDED:

1911

### LOCATION:

Armonk, NY

### PHONE:

800-646-2601

### EMPLOYEES:

427,000+

### REVENUES:

\$100 Billion (all  
IBM)

### WEB:

[ibm.com/business-analytics/spm](http://ibm.com/business-analytics/spm)

**AVERAGE # OF PAYEES:** 100 to 5,000+; largest client has over 300,000 payees

**PRIMARY MARKETS:** Broad array of industries including financial services, high tech, retail, industrial and telecom

**DELIVERY MODEL:** On-Premise or Cloud (multi-tenant or single-tenant)

**TOTAL # OF PARTICIPANTS:** N/A

**CLIENT BASE:** N/A

**MANAGED SERVICES:** Yes

**TRAINING:** Public or private classroom, instructor-led online, self-paced web based training.

**SUPPORT:** 24/7

**PRICING MODEL:** For on-premise: Perpetual license fee based on payees, plus annual maintenance fee. For cloud: Subscription pricing based on payees. For both: Implementation fee based on statement of work.

**TECHNOLOGY:** Uses Microsoft SQL database

**CUSTOMERS:** Office Depot, Farmers Insurance, Waste Management, Elavon, Mitel, Silverpop, Logicalis

**ADDITIONAL OFFERINGS:** IBM Cognos Territory Management, IBM Cognos Quota Management, IBM Cognos BI (for reporting & analysis), IBM Cognos TM1 (for planning, scenario modeling & forecasting), IBM SPSS (for predictive analytics), IBM Sterling Commerce (for CPQ), IBM Kenexa (for hiring, onboarding, training and talent management)

Iconixx is a total solution provider for compensation management.

The Iconixx cloud based product suite makes the company a one-stop resource for sales, bonus and salary compensation solutions.

Iconixx Sales™: A sales performance management (SPM) solution that makes it simple to design, configure, and manage complex sales compensation plans. Iconixx Sales delivers value with: a native workflow engine, native territory management, pre-configured business rules and formulas library, configurable role-based dashboards, self-service analytical capabilities, compliance through a complete audit trail, accrual and forecasts of total incentive compensation expenses based upon historical trends with seasonality factors, and analysis of plan effectiveness with “what if” modeling and payout forecasting.

Iconixx Incentive™: An incentive compensation management (ICM) tool that easily manages complex quarterly and annual bonus programs, discretionary awards, MBOs, and other variable incentive plans for the entire organization.

Iconixx Merit™: A solution to easily design, create, and manage complex Merit Increase processes requiring workflow driven approvals and budget management.

## COVERAGE

BI • CANDIDATE ASSESS & ON-BOARDING • COACHING & TRAINING • CPQ • SALES  
COMP ADMIN & DESIGN • SALES PROCESS • TERRITORY & QUOTA

## COMPANY INFO

### DATE FOUNDED:

2010

### LOCATION:

Austin, TX

### PHONE:

877-426-6499

### EMPLOYEES:

60+

### REVENUES:

N/A

### WEB:

iconixx.com

**AVERAGE # OF PAYEES:** 50 to 15,000+; (scalable to 100,000+)

**PRIMARY MARKETS:** Cross industry success including insurance, telecommunications, retail, technology, financial services, distribution, and business services

**DELIVERY MODEL:** Cloud/Software as a Service

**TOTAL # OF PARTICIPANTS:** N/A – (privately held)

**CLIENT BASE:** 50+

**MANAGED SERVICES:** Through internal professional services team and partners

**TRAINING:** Product training and certification through internal team and partners

**SUPPORT:** 24 x 7

**PRICING MODEL:** Subscription Model, Software as a Service

**TECHNOLOGY:** Cloud technology accessible through standard web browser

**CUSTOMERS:** Scholastic, World Fuel Services, Conifer Health Solutions, BlueCross BlueShield of Tennessee, Nokia, DISA Global Solutions, Centre Technologies, Cottage Health System, Dover, SOLCOMM, OnForce Solar

**ADDITIONAL OFFERINGS:** Managed Services, Expert Services

NICE Systems (NASDAQ: NICE), is the worldwide leader of intent-based solutions that capture and analyze interactions and transactions, realize intent, and extract and leverage insights to deliver impact in real time.

NICE Incentive Compensation Management enables companies to better manage their sales productivity and customer acquisition efforts. Automating the process of commission, bonus, and incentive administration in support of any type of variable pay strategy. NICE ICM offers organizations greater calculation process accuracy, improved sales force motivation and retention, and ultimately a pay-for-performance system that rewards employees for achieving targets.

NICE Sales Performance Management solution allows sales organizations to focus on their strategic advantage and core competencies. It provides a framework to analyze how teams are performing and take action as needed to drive sales effectiveness and improve operational efficiency.

## COVERAGE

BI • CANDIDATE ASSESS & ON-BOARDING • COACHING & TRAINING • CPQ • SALES  
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## COMPANY INFO

**DATE FOUNDED:**  
2001

**LOCATION:**  
Redwood Shores,  
CA

**PHONE:**  
650-486-4000

**EMPLOYEES:**  
Under 500

**REVENUES:**  
N/A

**WEB:**  
nice.com

**AVERAGE # OF PAYEES:** 10,000 to 100,000

**PRIMARY MARKETS:** Broad array of industries

**DELIVERY MODEL:** On-Premise or On-Demand

**TOTAL # OF PARTICIPANTS:** N/A

**CLIENT BASE:** > 2500

**MANAGED SERVICES:** No

**TRAINING:** Yes, usually on-site

**SUPPORT:** 24 x 7

**PRICING MODEL:** Cost per payee, per month

**TECHNOLOGY:** Web-based

**CUSTOMERS:** Air France, American Airlines, American Express, Teleperformance, Orange, T-Mobile

**ADDITIONAL OFFERINGS:** Merced Performance Suite, Merced PowerCoach, Merced Call Center Express

Optimize is an enterprise cloud computing company that designs, develops, and deploys integrated suites of Sales Performance Management applications, which are available through a worldwide network of value-added business partners.

Flagship offering Optimize SPM Cloud is a Platform as a Service (PaaS) for quickly deploying off-the-shelf SPM application suites and easily creating add-on SPM applications. These end-to-end, easily-configured, and highly-scalable applications help companies improve the performance of direct and indirect sales channels; bring order, clarity, and flexibility to the management of sales incentive compensation, territories, and quotas; gain actionable insight from big sales data and sales analytics; increase the effectiveness of mobile salespeople; and turn sales operations management into a strategic advantage.

## COVERAGE

BI • CANDIDATE ASSESS & ON-BOARDING • COACHING & TRAINING • CPQ • SALES  
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## COMPANY INFO

### DATE FOUNDED:

2013

### LOCATION:

USA; Singapore

### PHONE:

1-484-999-0980  
(USA)

+65-6638-7384  
(Singapore)

### EMPLOYEES:

250

### REVENUES:

N/A

### WEB:

optimize.com

### AVERAGE # OF PAYEES: N/A

**PRIMARY MARKETS:** ISVs; cloud service distributors; systems integrators; and management consultancy, outsourcing, and other service firms

**DELIVERY MODEL:** PaaS; public, private, or hybrid clouds

### TOTAL # OF PARTICIPANTS: N/A

**CLIENT BASE:** N/A

**MANAGED SERVICES:** N/A

**TRAINING:** Yes

**SUPPORT:** 24 x 7

**PRICING MODEL:** Subscription

**TECHNOLOGY:** Rich Internet Application (RIA): web-based, multi-layer/SOA, Java EE; schema-independent data model and built-in ETL processes for easy integration with ERP, CRM, HR, Sales, Payroll, Finance, and legacy systems

**CUSTOMERS:** Partner ecosystem: Optimize SPM Cloud enables software product vendors to add or embed SPM technology; cloud service distributors to sell SPM applications; systems integrators to design, implement, and support SPM solutions; and outsourcing and other service firms to create and deliver technology-enabled SPM services that make sales organizations more effective

**ADDITIONAL OFFERINGS:** Data Integration & Transformation; Portal Application Management; User & Role Management; Process Automation; Workflow Process Management; Dashboards & Reports; Cloud Deployment Services

Oracle provides a range of tools for managing business data, supporting business operations, and facilitating collaboration and application development.

OIC is Oracle's flagship offering from the E-Business Suite and has 250+ customers. Although OIC is largely deployed On-Premise, it also offers a Hosted option through Oracle On-Demand.

Oracle Incentive Compensation is a global compensation management application designed for strategically managing rewards to cost effectively align, motivate and communicate to employees, while maintaining financial control. It is implemented as a stand alone application or integrated with the following products: Oracle Order Management, Oracle Payables, Oracle Receivables, Oracle Human Resources and Oracle Payroll. OIC provides out-of-the-box XML-based reports and ad hoc analysis. All plan components and territories are date-effective.

## COVERAGE

BI • CANDIDATE ASSESS & ON-BOARDING • COACHING & TRAINING • CPQ • SALES  
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## COMPANY INFO

**DATE FOUNDED:**  
1996

**LOCATION:**  
Redwood City, CA

**PHONE:**  
800-633-0738

**EMPLOYEES:**  
10,000+

**REVENUES:**  
\$37.18 Billion

**WEB:**  
oracle.com

**AVERAGE # OF PAYEES:** 1,000 to 100,000+

**PRIMARY MARKETS:** Retail, high technology, telecommunications and banking

**DELIVERY MODEL:** On-Premise or On-Demand

**TOTAL # OF PARTICIPANTS:** N/A

**CLIENT BASE:** 250

**MANAGED SERVICES:** Yes

**TRAINING:** Yes, certification program

**SUPPORT:** 24 x 7

**PRICING MODEL:** Per user/month

**TECHNOLOGY:** Oracle database, Business Intelligence reporting, Oracle Data Integrator ETL, Siebel CRM

**CUSTOMERS:** Ateq, Base 3, Cox Communications, IHOP, MTC-Vodafone, Metalis, Pella, Prestaciones Universales

**ADDITIONAL OFFERINGS:** Oracle offers hundreds of applications, ranging from its well known database, to its ETL suite, CRM solution, Business Intelligence suite and middleware

Synygy is a worldwide provider of consulting, technology, and outsourcing services that improve sales operations and drive sales performance.

With nearly 600 professionals globally, Synygy's comprehensive, technology-agnostic approach to incentive compensation and sales performance management (SPM) includes consulting services for assessing and transforming SPM processes; technology services for executing business improvement strategies; and operational, analytical, and change management outsourcing services for continuously improving organizational performance.

## COVERAGE

BI • CANDIDATE ASSESS & ON-BOARDING • COACHING & TRAINING • CPQ • SALES  
COMP ADMIN & DESIGN • SALES PROCESS • TERRITORY & QUOTA

## COMPANY INFO

**DATE FOUNDED:**  
1991

**LOCATION:**  
Chester, PA

**PHONE:**  
610-494-3300

**EMPLOYEES:**  
600

**REVENUES:**  
N/A

**WEB:**  
synygy.com

**AVERAGE # OF PAYEES:** 250 to 50,000+

**PRIMARY MARKETS:** Health insurance, life insurance, life sciences, manufacturing, retail, banking, telecommunications, high tech, financial services

**DELIVERY MODEL:** On-Premise or On-Demand

**TOTAL # OF PARTICIPANTS:** N/A

**CLIENT BASE:** N/A

**MANAGED SERVICES:** Yes

**TRAINING:** Yes

**SUPPORT:** 24 x 7

**PRICING MODEL:** Subscription

**TECHNOLOGY:** proprietary SPM applications; Optimize SPM Cloud; BI and data visualization tools

**CUSTOMERS:** Abu Dhabi Commercial Bank, AMD, Blue Cross Blue Shield, Boehringer Ingelheim, Charter, CIGNA, Daiichi Sankyo, Deutsche Bank, Dow Jones, Dun & Bradstreet, Eaton, Franklin Templeton, GE, Henry Schein, HP, Johnson & Johnson, Lincoln Financial, McKesson, Nestle/Nespresso, OfficeMax, PepsiCo, Sears, Sunovion, Unisource, U.S. Cellular, and others

**ADDITIONAL OFFERINGS:** Assessment services, enablement strategy and planning, sales force transformation services; process and system design services, technology implementation and transition services, user education and support services; sales operations outsourcing services,



Xactly's vision is to empower companies to Inspire Performance.

Xactly believes in the power of incentives to help companies, their employees, and their partners build stronger relationships and achieve more. With their big data architecture, Xactly takes incentive compensation from a dark art to a science, providing decision-makers with the data insights they need to tap the motivational power of their incentive compensation.

Xactly's sales performance platform helps companies take control and easily manage every aspect of sales incentive compensation program. Inspire better performance, save precious time, and learn to incent right- all with one secure cloud based solution.

Xactly's wide array of products include: **INCENTEXPRESS™**, **INCENTPRO™**, **INCENTENTERPRISE™**, **XACTLYOBJECTIVES™**, and **XACTLYINSIGHTS**

## COVERAGE

BI • CANDIDATE ASSESS & ON-BOARDING • COACHING & TRAINING • CPQ • SALES  
COMP ADMIN & DESIGN • SALES PROCESS • TERRITORY & QUOTA

## COMPANY INFO

**DATE FOUNDED:**  
2005

**LOCATION:**  
San Jose, CA

**PHONE:**  
866-469-2285

**EMPLOYEES:**  
500

**REVENUES:**  
N/A

**WEB:**  
xactlycorp.com

**AVERAGE # OF PAYEES:** Varies by product

**PRIMARY MARKETS:** All industries, and all sizes of companies and sales forces. Xactly offers solutions for emerging companies, mid-market corporations and global enterprises.

**DELIVERY MODEL:** True Multi-tenant SaaS solution provided on-demand

**TOTAL # OF PARTICIPANTS:** Any Range

**CLIENT BASE:** >600

**MANAGED SERVICES:** Yes

**TRAINING:** Yes, Online, in San Jose, CA and On-site

**SUPPORT:** Yes

**PRICING MODEL:** Per payee, per month

**TECHNOLOGY:** True Multi-tenant SaaS

**CUSTOMERS:** Salesforce.com, SAP, Walgreens, Concur, Bank of America, John Hancock, Hyatt, American Express, Beckman Coulter, LinkedIn, Telus, Level(3), DHL, TriNet, Motorola, Lexmark, Siemens

**ADDITIONAL OFFERINGS:** Xactly has developed a variety of modules that extend the value of Xactly Incent software. Each one fully integrates with Xactly Incent, can be turned on immediately, and provides a distinctly different benefit to your compensation program. These include: Analytics, Sandbox, Modeling, eDocs & Approvals, Territories and Views.



# TERRITORY & QUOTA

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*The following vendors focus on territory and/or  
quota management*

# ProAlign

The quality and fairness of a sales territory can make or break the incentive plan and quota.

ProAlign software combines database, mapping, reporting and graphics, plus optimization algorithms to help you make the right decisions that significantly improve sales productivity. Ease of use, a short learning curve, and fast manipulation of data all are hallmarks of ProAlign. Now with Quota Master – set your annual plan, deploy and manage with your territory alignment.

## COVERAGE

BI • CANDIDATE ASSESS & ON-BOARDING • COACHING & TRAINING • CPQ • SALES  
COMP ADMIN & DESIGN • SALES PROCESS • TERRITORY & QUOTA

## COMPANY INFO

**DATE FOUNDED:**  
1989

**LOCATION:**  
Rochester, NY

**PHONE:**  
877-893-6490

**EMPLOYEES:**  
Under 50

**REVENUES:**  
N/A

**WEB:**  
proalign.net

**AVERAGE # OF PAYEES:** All segments and all size companies

**DELIVERY MODEL:** On-demand or On-Premise

**TOTAL # OF PARTICIPANTS:** N/A

**CLIENT BASE:** N/A

**MANAGED SERVICES:** Yes

**TRAINING:** Yes

**SUPPORT:** 24 x 7

**PRICING MODEL:** On-Demand: subscription based;  
On-Premise: license

**TECHNOLOGY:** Can be integrated with any CRM or ICM system

**CUSTOMERS:** N/A

**ADDITIONAL OFFERINGS:** B2B, B2C Market Data;  
Market Potential Models; Sales Capacity / Workload Models

# TerrAlign

TerrAlign provides software and consulting solutions for the Sales Analytics, Sales Operations, and Field Management teams that maximize the utilization and performance of the entire sales force.

This includes matching the number of sales resources to strategic objectives and designing quantifiably fair and geographically optimal territories.

TerrAlign solutions are designed for the user. TerrAlign 4, the flagship territory management software, is used by sales operations analysts and territory design specialists alike. TerrAlign eMap, the Web-based territory design application, is used by field managers and representatives who need to view and modify sales territory alignments based on local knowledge.

## COVERAGE

BI • CANDIDATE ASSESS & ON-BOARDING • COACHING & TRAINING • CPQ • SALES  
COMP ADMIN & DESIGN • SALES PROCESS • TERRITORY & QUOTA

## COMPANY INFO

**DATE FOUNDED:**  
1980s

**LOCATION:**  
Herndon, VA

**PHONE:**  
703-485-4560

**EMPLOYEES:**  
N/A

**REVENUES:**  
N/A

**WEB:**  
terralign.com

**PRIMARY MARKETS:** Life sciences, consumer products, technology

**DELIVERY MODEL:** On-Premise or On-Demand

**TOTAL # OF PARTICIPANTS:** 20,000+

**CLIENT BASE:** 50+

**MANAGED SERVICES:** Yes

**TRAINING:** Instructor-led classes onsite & virtual

**SUPPORT:** 24 x 7

**PRICING MODEL:** Subscription based model: license by user & territory

**TECHNOLOGY:** Ability to integrate with salesforce.com

**CUSTOMERS:** Fortune's Global 2000

**ADDITIONAL OFFERINGS:** TerrAlign eMap, TerrAlign for Salesforce, TerrAlign for Veeva, TerrAlign for MapInfo



## COACHING & TRAINING

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*The following vendors focus on  
customer relationship management*

# Miller Heiman

Miller Heiman delivers performance-enhancing sales solutions.

They work shoulder-to-shoulder with leading companies on initiatives ranging from sales training, to sales effectiveness, to complete sales transformations. They work with sales organizations to build the core strengths in sales techniques and sales management training needed in today's customer-focused environments.

Miller Heiman integrates sales solutions methodology into nearly every CRM platform and engages more than 140 experienced partners to enable consistent delivery of sales training courses and local implementations of our range of sales effectiveness, sales transformation, sales training and sales management training services.

## COVERAGE

BI • CANDIDATE ASSESS & ON-BOARDING • COACHING & TRAINING • CPQ • SALES  
COMP ADMIN & DESIGN • SALES PROCESS • TERRITORY & QUOTA

## COMPANY INFO

DATE FOUNDED:  
1978

LOCATION:  
Reno, NV

PHONE:  
877-678-3380

EMPLOYEES:  
200

REVENUES:  
N/A

WEB:  
millerheiman.com

**PRIMARY MARKETS:** Consumer products, energy, financial services & insurance, high tech, telecommunications

**CLIENT BASE:** 15,000+

**TRAINING:** Public workshops, on-site programs, e-Learning

**TECHNOLOGY:** Knowledge Center (online)

**CUSTOMERS:** CA technologies, MTN, Kodak, Medtronic, Experian, Ruan, McKesson, Ricoh

**ADDITIONAL OFFERINGS:** Conceptual Selling, Executive Impact, Securing Strategic Appointments, Advanced Concepts for Conceptual Selling, Strategic Selling, Strategic Selling Government, Large Account Management Process, Channel Partner Management, Sales Excellence Assessment, Sales Access Manager, Strategic Selling Coaching, Conceptual Selling Coaching, Strategic Selling Funnel Management

# Sandler

Sandler Training is a leader in sales, leadership and management training.

Sandler Training provides training and consulting services for small- to medium-sized businesses as well as corporate training for Fortune 1000 companies. Sandler provides "reinforcement training", a system that combines quality materials along with access to on going training workshops and coaching sessions.

Sandler works to identify the type of training that is right for you or your organization. Sandler Training strives to develop top-performing sales, management and executive teams that excel in a fluid, fast-paced, global business environment. Sandler's goal is to help clients initiate substantive, measurable and sustainable growth.

## COVERAGE

BI • CANDIDATE ASSESS & ON-BOARDING • COACHING & TRAINING • CPQ • SALES  
COMP ADMIN & DESIGN • SALES PROCESS • TERRITORY & QUOTA

## COMPANY INFO

### DATE FOUNDED:

1967

### LOCATION:

Owning Mills, MD

### PHONE:

410-653-1993

### EMPLOYEES:

Under 500

### REVENUES:

N/A

### WEB:

sandler.com

**PRIMARY MARKETS:** Business to Business, Financial services, insurance, healthcare, telecommunications

**CLIENT BASE:** Historically focused on small to medium, now increasingly serving larger more global businesses

**TRAINING:** Support materials, training workshops, individual coaching sessions, Sandler Online, instructor-led classes

**TECHNOLOGY:** Online resources

**CUSTOMERS:** Bank of America, American Express, Baxter Healthcare, AT&T, Prudential, Salesforce.com, Hewlett Packard, Oracle, Lennox, First Capital Corporation

**TRAINING OFFERINGS:** Sales training, management training, corporate training, specialized training topics: negotiation, consulting, networking & coaching, Sandler books, Huizega Business school, Sandler tools, Sandler Online

OS

CPQ

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*The following vendors focus on  
configure, price, quote and proposals*



# Apptus

Apptus delivers Software as a Service (SaaS) solutions to complete the Quote-to-cash customer process and the Procure-to-Pay supplier process. The solutions enable end to end lifecycle capability for customers, partners and suppliers.

Apptus provides unique applications that enable users to manage the entire Enterprise Commitment Management process. Enterprise Commitment Management is a space that has been pioneered by Apptus and constitutes any process that makes, documents, signs or manages a commitment made between an organization and a trading partner. This is a unique view of the marketplace but one that is completely aligned with our customers and the market place.

## COVERAGE

BI • CANDIDATE ASSESS & ON-BOARDING • COACHING & TRAINING • CPQ • SALES  
COMP ADMIN & DESIGN • SALES PROCESS • TERRITORY & QUOTA

## COMPANY INFO

**DATE FOUNDED:**  
2006

**LOCATION:**  
San Mateo, CA

**PHONE:**  
650-539-2052

**EMPLOYEES:**  
251-500

**REVENUES:**  
N/A

**WEB:**  
apttus.com

**PRIMARY MARKETS:** Telecommunications, manufacturing, technology, financial services, aviation, healthcare, entertainment, services

**DELIVERY MODEL:** On-Demand

**TOTAL # OF PARTICIPANTS:** N/A

**CLIENT BASE:** Global 1000

**MANAGED SERVICES:** Yes

**TRAINING:** Virtual or regional instructor-led classes, certification program

**SUPPORT:** N/A

**PRICING MODEL:** N/A

**TECHNOLOGY:** Integrates with Salesforce.com

**CUSTOMERS:** Abbott, Delta Airlines, Google, Motorola, Symantec, Salesforce.com, Time Warner Cable, Standard & Poor's

**ADDITIONAL OFFERINGS:** Contract Management, Renewals Management, Revenue Management, Supplier Relationship Management

# BigMachines

BigMachines is a leader in sales configuration, quoting and proposal software.

The solutions empower sales across customer channels by streamlining their sales processes from opportunity to quote to order and share data with a CRM, ERP and other business systems.

BigMachines quoting software ensures consistent application of pricing and discounting rules, and you can analyze and change pricing in real-time. In addition, you can automatically generate rich, customer friendly sales quotes in multiple formats.

## COVERAGE

BI • CANDIDATE ASSESS & ON-BOARDING • COACHING & TRAINING • CPQ • SALES  
COMP ADMIN & DESIGN • SALES PROCESS • TERRITORY & QUOTA

## COMPANY INFO

**DATE FOUNDED:**  
2000

**LOCATION:**  
Deerfield, IL

**PHONE:**  
847-572-0300

**EMPLOYEES:**  
Under 250

**REVENUES:**  
\$49.8 M

**WEB:**  
bigmachines.com

**PRIMARY MARKETS:** High Tech, manufacturing, telecom, financial services, medical, and media

**DELIVERY MODEL:** On-Premise or On-Demand

**TOTAL # OF PARTICIPANTS:** 150,000+

**CLIENT BASE:** 250+

**MANAGED SERVICES:** Yes

**TRAINING:** Instructor-led classes, with the option of on-site training, certification program

**SUPPORT:** 24/7

**PRICING MODEL:** N/A

**TECHNOLOGY:** Salesforce.com, Oracle, Microsoft Dynamics CRM, SAP

**CUSTOMERS:** FujiFilm, Ingersoll Rand, RSA, Diebold, ShoreTel, NextGen, Medtronic

**ADDITIONAL OFFERINGS:** Product Configurator, Workflow Approvals, Channel Management, Order Execution, Product Catalog, Proposal Generation, eCommerce, Reporting, Guided Selling



# BUSINESS INTELLIGENCE

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*The following vendors focus on  
Business Intelligence*

# IBM Cognos

IBM Cognos plays a vital role in business intelligence to financial performance and strategy management to analytics applications, Cognos software can provide what your organization needs to become top-performing and analytics-driven.

With products for the individual, workgroup, department, midsize business and large enterprise, Cognos software is designed to help everyone in your organization make the decisions that achieve better business outcomes—for now and in the future.

IBM Cognos Enterprise equips business users with what they need to freely explore information, analyze key facts, quickly share and collaborate to gain alignment with key stakeholders and act with confidence to drive your business forward. Cognos Enterprise supports the way business users want to work: on the web, on their mobile devices, on the desktop, in ongoing processes and coordinated with others in the organization.

## COVERAGE

BI • CANDIDATE ASSESS & ON-BOARDING • COACHING & TRAINING • CPQ • SALES  
COMP ADMIN & DESIGN • SALES PROCESS • TERRITORY & QUOTA

## COMPANY INFO

**DATE FOUNDED:**  
1911

**LOCATION:**  
Armonk, NY

**PHONE:**  
800-646-2601

**EMPLOYEES:**  
427,000+

**REVENUES:**  
\$100 Billion

**WEB:**  
[ibm.com/software/analytics/cognos](http://ibm.com/software/analytics/cognos)

**PRIMARY MARKETS:** Financial services, healthcare, government, retail, energy & utilities, communications, insurance

**DELIVERY MODEL:** On-Premise or On-Demand

**TOTAL # OF PARTICIPANTS:** 23,000+

**CLIENT BASE:** N/A

**MANAGED SERVICES:** Yes

**TRAINING:** Yes, onsite classroom, online web based training, certification program

**SUPPORT:** 24/7

**PRICING MODEL:** License per user

**TECHNOLOGY:** Cognos has the ability to integrate with most platforms

**CUSTOMERS:** Finnish Transport Agency, Nucleus Research

**ADDITIONAL OFFERINGS:** IBM manufactures a surplus of products ranging from data management to email clients

Microsoft has been doing Big Data long before it was popular. For example, Microsoft Bing analyzes over 100 petabytes of data to deliver search results.

Organizations can use the Microsoft Big Data solution to unleash actionable insights from a broad and diverse range of data through familiar tools like Microsoft Office and Microsoft SharePoint. It combines the simplicity of Windows with the power and reliability of the Hortonworks Data Platform (HDP) to deliver new insights from all their data. It also enables customers to uncover new value by connecting to the world's data and services.

## COVERAGE

BI • CANDIDATE ASSESS & ON-BOARDING • COACHING & TRAINING • CPQ • SALES  
COMP ADMIN & DESIGN • SALES PROCESS • TERRITORY & QUOTA

## COMPANY INFO

**DATE FOUNDED:**  
1975

**LOCATION:**  
Redmond, WA

**PHONE:**  
425-882-8080

**EMPLOYEES:**  
10,000+

**REVENUES:**  
\$77.31 Billion

**WEB:**  
microsoft.com

**PRIMARY MARKETS:** Microsoft has a presence in a variety of industries

**DELIVERY MODEL:** On-Demand

**TOTAL # OF PARTICIPANTS:** N/A

**CLIENT BASE:** N/A

**MANAGED SERVICES:** Yes

**TRAINING:** Yes, online resources

**SUPPORT:** 24/7

**PRICING MODEL:** Tiered pricing per user/month

**TECHNOLOGY:** Microsoft Big Data can integrate with most applications

**CUSTOMERS:** Siemens Energy XHQ, The Weather Channel, Konica Minolta, Polaris

**ADDITIONAL OFFERINGS:** Microsoft has a wide array of products from email clients to computer operating systems; SQL Server, Sharepoint, PowerPivot

# SAP BusinessObjects

SAP is in the leader in enterprise software and software-related service, it's one of the largest software companies in the world.

SAP BusinessObjects business intelligence (BI) solutions help organizations better understand their business and make more confident decisions. Complementing these with other business analytics solutions from SAP – for data warehousing; enterprise information management; enterprise performance management; and governance, risk, and compliance – organizations can monitor, explore, and analyze data, and then use it to plan, mitigate risk, and take action. They can decide better, perform better, and achieve better results throughout all areas of their business.

## COVERAGE

BI • CANDIDATE ASSESS & ON-BOARDING • COACHING & TRAINING • CPQ • SALES  
COMP ADMIN & DESIGN • SALES PROCESS • TERRITORY & QUOTA

## COMPANY INFO

**DATE FOUNDED:**  
1972

**LOCATION:**  
Newtown Square, PA

**PHONE:**  
866-681-6121

**EMPLOYEES:**  
50,000+

**REVENUES:**  
\$16.2 Billion(2012)

**WEB:**  
sap.com

**PRIMARY MARKETS:** Financial services, healthcare, government, higher education, general business

**DELIVERY MODEL:** On-premise or On-demand

**TOTAL # OF PARTICIPANTS:** 238,000+

**CLIENT BASE:** N/A

**MANAGED SERVICES:** Yes

**TRAINING:** Yes, virtual classroom & certification program

**SUPPORT:** 24/7

**PRICING MODEL:** License per user

**TECHNOLOGY:** SAP Business Objects can integrate with most products

**CUSTOMERS:** Cisco, Deloitte, Zappos.com, Pegasystems, Northern Kentucky University, Jive Software

**ADDITIONAL OFFERINGS:** SAP has a plethora of applications; best known for ERP, it's data warehouse product, SAP Business Warehouse, CRM, Product Lifecycle Management (PLM), Supply Chain Management (SCM), Supplier Relationship Management (SRM)

# HONORABLE MENTIONS

Product/Vendor	BI	Assessment/ Coaching & Training	ICM	Sales Process / CPQ	Territory/ Quota
Actuate BIRT actuate.com	✓				
AmbiCom commissiontracker.com			✓		
Birst birst.com	✓				
CellarStone, Inc cellarstone.com			✓		
Chally chally.com		✓			
Compensation Master compensationmaster.com			✓		
CoreTrac coretrac.com				✓	
Cornerstone cornerstonesoftware.com			✓		
Domo domo.com	✓				
EfficientHire efficienthire.com		✓			
Exaxe exaxe.com			✓		
Financial Database Services fdbs.com			✓		
Flaum Technologies commissioncalc.com			✓		
Foxtrot Software foxtrotsw.com			✓		
FPX fpx.com		✓	✓	✓	
Glocent glocent.com			✓		
Halogen Software halogensoftware.com	✓		✓		

Product/Vendor	BI	Assessment/ Coaching & Training	ICM	Sales Process / CPQ	Territory/ Quota
HCR Software hcrsoftware.com			✓		
Hinda Incentives hinda.com			✓		
Huthwaite huthwaite.com		✓			
Incential incential.com			✓	✓	✓
Incentives Solutions incentivesolutions.com			✓		
LaserBeam Software laserbeamsoftware.com			✓		
McCamish Systems mccamish.com			✓		
MCCR, Inc. mccr.com			✓		
Microsoft Dynamics CRM crmdynamics.com				✓	
Net Commissions netcommissions.com		✓	✓		
NetView Technologies netviewtechnologies.com			✓		
NSS Corp nsscorp.com			✓		
ObjectBuilders objectbuilders.com			✓		
PeopleFluent peoplefluent.com		✓	✓		
Performance Centre performancecentere.com			✓		
QlikView qlikview.com	✓				
QuoteQuickly - Steel Brick steelbrick.com				✓	



Product/Vendor	BI	Assessment/ Coaching & Training	ICM	Sales Process / CPQ	Territory/ Quota
RedCarpet silkroad.com		✓			
Relasoft Solutions, Inc. relasoft.net	✓		✓		
Sales Assessment salesassessment.com		✓	✓		
SalesStar salesstarsoftware.com		✓			
Scorecard Systems scorecardsystems.com			✓		
SPI Software Solutions spisoftwaresolutions.net			✓		
Strategix Performance strategixperformance.com			✓		
Surgesoft surgesoft.com			✓		
Tableau tableausoftware.com	✓				
The TAS Group thetasgroup.com		✓			
ViComp Management vicompmt.com			✓		
Vistex vistex.com			✓		
WellHire wellhire.com		✓			
Xpress Enterprise Onboarding kmssoftware.com		✓	✓		
Xtiva Fiancial Systems xtiva.com			✓		

# Strategy Services

*Helping you be in front and stay in the lead!*

- » SPM Strategy Assessments
- » Business Case for Automation
- » Vendor Selections
- » Implement readiness and change management
- » Design, implement, and assess incentive plans
- » Help define roles and organizational design
- » Business Intelligence Maturity Assessments

# Notes

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# Notes

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# Contact Us

*For more information about this vendor guide, other OpenSymmetry SPM strategy studies or our services, please contact:*

- » **Phone:** +1 (877) 261 – 2661
- » **Email:** [strategy@opensymmetry.com](mailto:strategy@opensymmetry.com)
- » Visit our website at [www.opensymmetry.com](http://www.opensymmetry.com)