

CASE STUDY



Planview decreased the time spent on routine calculations by 90%.



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With CaptivateIQ, the Planview team automated their end-to-end commission process and improved the accuracy of monthly payout calculations. Using real-time pay statements, the team also saw better visibility into deal progression which helped keep reps informed of quota attainment.

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Payout calculations completed in two hours instead of three business days.

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Eliminated calculation mistakes and increased accuracy.

The Hero

Sean Emberley, Sales Operations Analyst, manages all commissions at Planview, an enterprise work and resource management platform serving 4,500 customers and 1.3 million users worldwide.

“Not only does CaptivateIQ do Excel functionality very well, but it gives you the automation of a software tool plus integrations with a bunch of different systems. I feel it has really found the sweet spot between simplicity and functionality. If anyone's looking for a variable compensation tool, I would definitely put CaptivateIQ on that list. - Sean Emberley, Sales Operations Analyst at Planview.”



The Challenge

Running Compensation for a Growing Team With Excel



Since 1989, Planview has been helping organizations accelerate their strategic growth through their Portfolio Management and Work Management solutions. Planview's platform enables teams to deliver innovative and competitive products, services, and customer experiences.

Recently, Planview has been experiencing tremendous expansion. In February of 2021, Planview acquired two solutions, Clarizen and Changepoint, to further accelerate their plans to reinvent the future of on-strategy delivery. As a newly combined entity, Planview now employs over a thousand people and serves more than 1.3 million users worldwide, including Fortune 100 companies.

The Planview team recognized they needed a more robust compensation tool that can save the team time and increase the accuracy of calculations.

“While Excel offers a lot of flexibility, you're stuck doing a lot of the same processes. It takes a lot of time to get data out of Salesforce. Also, when you have such a manual process, you open yourself up to making mistakes.”

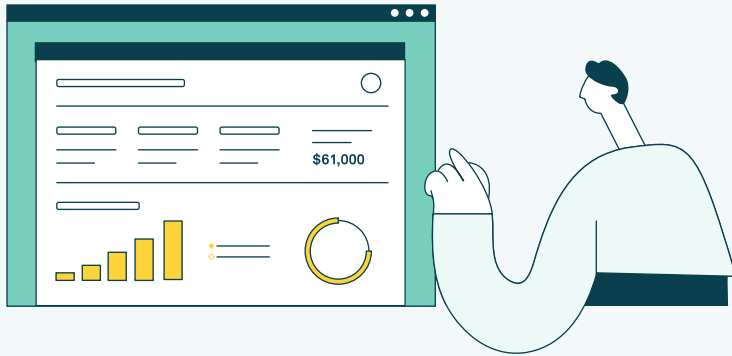
As the person responsible for managing all of Planview's commissions, Sean knew about the time-consuming tasks required to run payment calculations on a monthly and quarterly basis. Initially, he relied on homegrown Excel spreadsheets to manage all of the data and calculation logic but quickly realized that as the sales team grew and the company evolved over time, they needed a solution that could scale with them.

With eight compensation plans for over 150 sales reps, Sean was looking for a streamlined solution that any single administrator could manage. Being able to easily configure plans and troubleshoot errors was absolutely essential given the large, growing number of reps. Another point of interest was dealing with the complexities that come with having lots of data and suboptimal data gathering practices. Using CaptivateIQ's library of source data integrations to put an end to manual data collection, Sean saved valuable time and effort.

The Solution

A Scalable Incentive Compensation Software Solution

With CaptivateIQ, the Planview team found a solution that struck the ideal balance of flexibility and robust functionality that helped them scale their commissions operations.



“CaptivateIQ successfully and intuitively mirrors excel functionality and offers key integrations like Salesforce CRM that ensure commission data is shared across all business-critical systems.”

After bringing on Xactly as a vendor and later realizing they were not a good fit, Sean and the Planview team quickly found success with CaptivateIQ.

Sean took advantage of CaptivateIQ’s self-serve implementation and completed a successful deployment within four months. To get up and running quickly, Sean turned to our customer knowledge center which provides robust documentation and core product information.

Sean was able to set up his account and build commission plans on his own, with limited help from our implementation specialists.

The team at CaptivateIQ is very responsive. Typically, they will get back to me within the same day. I feel like they listen to me as a customer and are very open to recommendations for future functionality within the tool. They’ve taken a lot of my recommendations and actually implemented them.

The nature of the CaptivateIQ platform made it easy for Sean to get the information he needed to process and calculate commissions with minimal effort so he can focus on other important tasks.

The Results

Reduction in Processing Time and Better Visibility Into Performance



Planview decreased the time spent processing monthly calculations by 90% while increasing accuracy.

Sean and the commission team at Planview saw a dramatic decrease in the amount of time they were spending on monthly payout calculations: they went from spending two to three days to just two hours. Not only that, but they also experienced an increase in the accuracy of the calculations as they were no longer relying on error-prone Excel spreadsheets. All calculations are configured in the CaptivateIQ platform and can be easily adjusted according to shifting company goals and changes to the commission plan structure.

“Time spent every month performing calculations is reduced by more than 90%, while calculation accuracy has increased.”

Planview saw improved visibility into performance by being able to view pay statements as deals progress.

Prior to using CaptivateIQ, the sales team did not have any visibility into their performance or their expected payment amounts. This made it difficult to understand where individual reps stood in terms of quota attainment. With CaptivateIQ's Salesforce CRM integration, Planview's sales reps can view their current pay statements and progress on deals in real-time. This way they can better manage their efforts and focus on the activities that are going to add the most value to both their individual performance as well as the business overall.

Payees no longer need to wait for one to two weeks after month close before seeing expected payment amounts. They now have the option of previewing updated pay statements in real-time as deals close.

About CaptivateIQ

CaptivateIQ, the agile commission solution, enables companies to consistently align revenue teams with evolving business goals. Combining flexibility with ease of use, CaptivateIQ offers a powerful calculation engine that saves customers days every month processing commission payouts. Leading companies like ClassPass and Gong rely on CaptivateIQ to transform their data, build any commission plan, and motivate sales reps with real-time visibility. CaptivateIQ gives finance, operations, and sales teams insights and control over their incentive compensation programs – allowing them to better adapt to change, and more easily tailor plans to meet the current needs of their business.

