



## ANAPLAN INCENTIVE COMPENSATION MANAGEMENT SOLUTION FOR GLOBAL FINANCIAL SERVICES FIRM

Established in 1945, this global financial services firm is the world's largest outsourced asset management company. It is established as a subsidiary of a Fortune 500 professional & financial services firm with a revenue of nearly \$20 billion.

This client has over 25,000 consultants with a global footprint operating throughout 130 countries.



### INDUSTRY

Financial Services, Professional Services



### USE CASE

Incentive Compensation Management



### TECHNOLOGY

Anaplan

## CHALLENGES

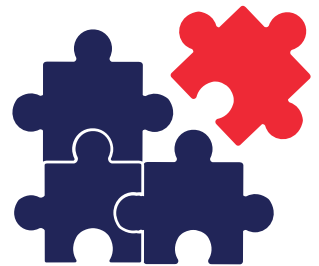
The legacy process for administering sales compensation was highly inefficient and involved manual data collection processes across 20+ manual extracts and spreadsheets, applied inconsistently throughout the organization. The company's incentive plans themselves were highly custom and complex, with enterprise-scale data volumes and significant yearly lift to prepare the Excel-based calculation tools used for processing historically. In addition to bearing the administrative burden associated with the calculations, plan administrators spent a significant portion of their time addressing a high volume of one-off communications, disputes, and inquiries that added up to an overall frustrating and ineffective approval compensation process.

## SOLUTION

Accelytics partnered with the firm to implement a robust sales compensation solution in Anaplan to fully automate crediting, calculations, and reporting functions across 10 compensation plans and multiple regions. As part of the enterprise-scale transformation, Accelytics also designed and implemented a holistic data integration strategy, replacing manual extracts with nightly feeds via Anaplan Connect. Accelytics worked directly with key stakeholders to collaboratively train client model builders and provide end-to-end change management services to ensure cross-organizational readiness for the large-scale process and technology makeover.

## RESULT

Through their new Anaplan solution, the client is estimated to achieve \$1.5M in annual savings due to overpayment reduction. Additional benefits are also being realized in the form of increased seller and administrator productivity, including an estimated 12,000 hours of annual productivity uplift among sales consultants, and 2,000 hours of annual reduction in manual admin and support effort.



Overall, Accelytics was able to partner with the firm to enable a new view of sales compensation throughout the organization – one that is more manageable, more transparent, and more effectively enables both front-end and back-end sales functions alike.



Accelytics stands for "accelerated analytics." Our team specializes in business process optimization and technology enablement within the scope of supply chain, sales performance management, and financial planning and analysis.

Accelytics leverages its Accelerated Approach methodology to help clients establish industry focused sustainable processes while using technology as a true enabler to the process.

Our experienced team delivers a broad range of services to help clients throughout their entire transnational journey. We provide solutions that include business process optimization, technology enablement and support services.

Accelytics is headquartered in Houston, TX with offices in Dallas, Denver, Minneapolis and New York. Learn more at [www.accelytics.com](http://www.accelytics.com).