

Case Study

Comparing an automated SPM solution to Excel

Lanshore LLC.

September 2017



Introduction

Lanshore is a reseller, implementer and managed service provider of sales performance management solutions.

Issue

Customer is a financial institution. The business and sales people have very complex and varied reward schemes. The business, and sales teams placed high demands on the reward team. At the same time, payments are very heavy regulated and therefore compliance is the most important aspect.

General Write up of project

After a few high-profile issues, the customer decided to investigate the use of an automated solution to replace Excel. Their perceived benefits of Excel were:

- Cheap
- Lots of skills within the business
- Very flexible

However, they looked at the negatives and summarized:

- Excel is easier to break
- Quickly becomes unwieldy
- Difficult to secure
- Distribution of data

Their thoughts on an automated system were:

Pros

Control of solution
Data can be secure
Distribution of data

Cons

Less flexible
Dependent on changing resources / budget

During the analysis, there was a compliance issue, which on its own justified the implementation and moved the client in that direction.

The implementation was not without issue but once the client had moved into a managed service agreement (see separate case study) they were able to look at the benefits which they categorized from 3 perspectives: technical, business and commissions/ sales ops.

Technical benefits

- The system is designed to handle commissions
- If you can think of it, the system can probably do it
- Interfaces with other system
- Built in scheduler
- No manual processes
- All data stored within one place for our schemes
- Audit Trail
- Support
- In-house or 3rd party

Business Benefits

They found the biggest benefit was the improved relationship with the business and sales team.

- Transparency
- Web client
- Historic data
- Daily updates
- No excuse for month end queries
- Trust
- Greater understanding of their numbers
- Numbers cannot be changed: A greater perception of objectivity;
- Being less flexible = greater security = Trust
- Commission/ sales ops perspective
- Month End Process- No stress
- Business processes can be managed where appropriate
- Risks reduced
- Internally: Calculations correct
- Externally e.g. reputational risk
- Once established, becomes essential
- Politically neutral

The end result

When asked to summarize that an automated solution had brought to the business, our client simply said, "Commissions have become a non-issue".