

Case Study

Keeping SPM Implementation on Budget when software lacks key functionality

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Introduction

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

Issue

Customer had been using excel to calculate commission along with some ad hoc reporting with Salesforce.com that did not provide the audit capability and transparency needed as the organization grew. As the implementation went along it was discovered that a piece of key software functionality was missing.

Due to the ultimate flexibility in excel, this customer would break up payments on a nontraditional schedule when payments were received. This is becoming more of a norm in the SAAS software business, and applies to more than just one company Lanshore has worked with.

General Write up of project

Customer utilizes their SaaS application to simplify benefit comparisons for companies. They market their solutions to employers and carriers. For employers, this allows for employees to see what their best coverage model is using analytics along with several other software features. For carriers, it streamlines the enrollment process.

The reason for getting onto an automated commission solution was several fold. First, they needed to have the audit capability that is often missing in manual/spreadsheet based systems. They also needed to be able to grow organizationally allowing for more payees and plan changes to mold to the ever-changing growth environment they are experiencing.

Last, they needed to be able to model out future costs and have transparency in reporting.

Existing solution

Homegrown combination of excel and salesforce.com reporting.

Problems

- A requirement was unable to be met with standard functionality
- Change of plan structure during the project and after design

Resolutions

- The requirement was triaged and three options were determined
- Use vendor approved nonstandard functionality which would require non-application configuration
- Mix the nonstandard functionality with development and some manual process/outside vendor application process
- Full manual process

The determination was made to use nonstandard functionality along with manual process/ outside vendor application process. In working with the customer, Lanshore and the customer developed a process by which during normal configuration cycle calculations the nonstandard functionality runs and satisfies the requirement.

The customer then takes the output of that function and loads it into salesforce.com for manual process and payment.

Lanshore worked with the customer, educating them on the new commission system. The customer was then able to, with the help of Lanshore, make plan changes and validate the changes. In this cooperation, the customer has successfully learned the system and reduced overall cost.

Lessons learned

During the demo, insure that key requirements are either resolved by the software or there is a definitive path to resolution utilizing parts of software functionality. As an implementer, always make the customer aware of hurdles immediately.