CASE STUDY

LINKING SALES COMMISSION DATA BETWEEN FINANCIAL SYSTEMS AND CRM

What's the problem?
We're a high tech Fortune 500 company. We are very sales-driven, so both CRM our commission system are critical to our ongoing success.

When reps close a deal, they track and record it in the CRM system. It's opened separately in the company's financial software as a new contract. But there's no direct link between the two systems. This means it's difficult to validate when a rep's commission is due and how much, because the rep's details aren't in the data loop by the time delivery and contract value are confirmed. There's also no clear audit trail, for compliance.

The manual process to connect these two data sources has several steps and relies on spreadsheets from SQL reports downloaded out of the CRM and finance applications. Manual logic and a complex spreadsheet with lookup tables are used to identify eligibility for commissions.

How did Lanshore help?
They created a workflow that allows the contract to be associated with the rep who sold it. The workflow software was configured to give the sales reps access to the contract, so they can claim it and initiate manager verification. The association is saved into the commission tool so that the actions and reporting can take place directly in that tool. An accurate and timely commission payment can be initiated automatically.

How are things now?
Lanshore deployed the automated workflow, so we could regain control of the commission process and bring all the information and calculations into one, compliant workflow. They educated our team on the new commission system. We can now make our own plan changes and validate them, reducing support costs.

Tell us about the tech.
Many SME organizations experience this kind of problem in the new world of SaaS. There was another option for resolution, which could have worked well for other systems: using workflow to associate the sale from CRM to the contract. The commissionable event can be loaded into the CRM (or in some cases a business intelligence (BI) warehouse) to show the link and then imported to a commission application for processing.

The bottom line

"SALES REPS' FAITH IN THE COMMISSION SYSTEM IS RESTORED AND WE ARE CONFIDENT OF COMPLIANT AND ACCURATE PROCESSING AND PAYMENTS."