Performio®

WP Engine's Global Order to Cash Team Selects Performio to Modernize their Commissions Process

Client:
wp engine®

Industry:
IT Services

Headquarters:
Austin, TX

Size:
1000+ employees

ℹ About

WP Engine is a new breed of technology company at the intersection of software innovation and service. Their platform provides brands the solutions they need to create remarkable sites and apps on WordPress that drive their business forward faster. WP Engine's tech innovation and award-winning WordPress experts help to power more than 1.5 million sites across 150 countries.

❓ The Challenge

WP Engine's global order to cash operations team had an Xactly product called Obero. They had purchased Obero prior to the company being acquired by Xactly in 2018. After the acquisition, Xactly sunsetted the product and the solution no longer met the needs of the finance team.

"Our biggest issue was reporting out of Obero," explains Tara Kelly, Global Order to Cash Operations Manager. "It was a dark world and very time consuming to review individual statements and report on rep attainment. It required a ridiculous amount of time to manually download and compile the reports for more than 200 plus sales people and every time we needed to make a change to the comp plans, it required professional services support, which cost us a lot of money."

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Tara Kelly,
Global Order to Cash
Operations Manager,
WP Engine

In addition to challenges with reporting and the inflexible nature of Obero, accuracy was an issue. Because the software would only sync with Salesforce once a day, they would have to manually update Obero to make sure the data was accurate. Managing the commissions process was a full-time job and it often would take 3 to 4 days for an issue to be resolved by Xactly's customer support, even when it was a relatively minor problem. The team relied on using Google sheets as a secondary method of calculating commissions so that they could cross check the data with Obero to ensure accuracy and report on attainment. The overall process was incredibly manual and time intensive.

⚡ The Solution

A member of the team evaluated the major incentive compensation management providers in the market and created a shortlist including Performio, CaptivateIQ, Xactly, Callidus and NetSuite. They formed a broader evaluation committee to review the possible alternatives.

After evaluating the cross-section of vendors, Performio's product functionality stood out because it directly integrated with SFDC and NetSuite, automated the majority of the commissions process, and provided powerful dashboards where reps could view performance against quota and actual commission payments. Furthermore, the customer support Performio offered was far superior to what they had been experiencing with Xactly. They knew with Performio, they could get their issues resolved quickly and get quality support from the team.

✔ The Results

Today WP Engine leverages Performio to manage the end-to-end commissions process. Four departments use information provided within Performio including sales operations, accounting, finance, and payroll. The Order to Cash team reviews the information in Performio to make sure what is in Salesforce is accurately reflected in Performio. Sales leadership reviews the commission payments and once approved, O2C hands off the statements to the Payroll team.
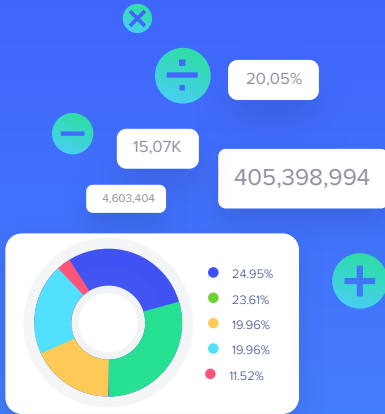
Performio ®

> " **The time savings we get with Performio is incredible, not just checking commissions, but also reporting. I also love how easy it is to make changes to the plans myself and we are saving a lot of money on the professional services fees we would have had to pay to Xactly** "

Tara Kelly,
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After implementing Performio, Kelly remarked "You can't put a price on the professional services manager. We would have been lost without her. She is fantastic and delivered an excellent experience."

The time spent calculating commissions and providing the reports to sales reps, managers, and executives has been reduced by 30 hours per week, the equivalent of one full time employee.

"The time savings we get with Performio is incredible, not just checking commissions, but also reporting," explains Kelly. "The NetSuite integration was a huge selling point. I also love how easy it is to make changes to the plans myself and we are saving a lot of money on the professional services fees we would have had to pay to Xactly."

"Our reps love that they can track their performance month over month," says Kelly. "Managers love the clear visibility into their team members performance and the executive team has been eager to see the return on investment leveraging Performio."