

Optymyze Sales Platform

Today, sales performance management (SPM) systems need to extend beyond simple automation of sales incentive compensation management. They must be extensible and flexible to meet the unique and dynamic needs of your business, provide a complete, real-time view of sales information for improved decisions, and demonstrate ROI as quickly as possible.

The Optymyze Sales Platform™ delivers these outcomes via a powerful set of technologies, comprised of three distinct components:

OPTYMYZE SALES ANALYTICS



An integrated set of enterprise-class, sales data management tools that allow for integrated data extraction, transformation, and load (ETL), plus a complete portfolio of sales data analysis tools that provide answers to key sales questions.

OPTYMYZE SALES STUDIO



An application development platform that enables non-technical business analysts to extend the capabilities of Optymyze Sales Performance, by building custom applications to suit their needs.

OPTYMYZE SALES PLANNING



A complete set of sales planning tools for sales management and sales operations, to plan and model sales scenarios to make the best strategic decisions.

Realize Value Faster with Optimize Sales Analytics

Underlying all Optimize Sales Performance™ applications is the Optimize Sales Analytics™ platform. This data management, reporting, and analytics platform speeds time-to-value by improving access and visibility to key sales data and metrics, across the entire sales organization. The platform is made up of two integrated applications:

- Sales Data Management
- Sales Data Analysis



Sales Data Management

Sales Data Management manages all parts of the core database of Optimize Sales Performance. This includes management of the tables, logical business objects and relationships, as well as managing all data load, import, export and transformation functions. Key components of Sales Data Management include:

Optimize Data Repository

Optimize Data Repository™ brings together and manages information, business objects, and relationships between all parts of the solution. By centralizing and streamlining information management, Optimize Data Repository simplifies administration of the entire sales performance management process. Optimize Data Repository allows you to:

- Easily combine any type of data with seamless integration to CRM, SFA, HRIS, Payroll, BI, legacy systems, and third-party data sources.
- Have a single, consistent, clean repository of data across all parts of your sales performance management process.
- Protect your data with secure data integration standards, including standard, secure file transfer protocols.

Optimize Data Automation

Completely automate data collection, transformation, reporting, and intelligence, and customize processes to fit your business. With Optimize Data Automation™, you can:

- Make sales compensation and sales operations processes more efficient and less time-consuming.
- Eliminate manual, repetitive tasks associated with calculating, analyzing, and paying out sales compensation.
- Adjust your incentive compensation process more quickly in response to market changes.

Optimize Data Transformation

Optimize Data Transformation™ is the industry's most robust, extensible data processing and calculation engine, and is relied upon by many large, market-leading organizations. It performs sophisticated data transformations, validations, compensation calculations, and numerous other operations. Optimize Data Transformation lets you:

- Represent any sales compensation logic with a highly flexible, powerful data transformation engine.
- Map the sales compensation process to any organizational structure with a highly extensible data model.
- Ensure accuracy of compensation information and calculations with complete tracking and auditing of data and configuration objects.

Sales Data Analysis

Visualize, analyze, and communicate information across your enterprise with Sales Data Analysis. A combination of self-service reporting, analysis, and dashboard tools helps you share information and drive greater sales insights. Key components of Sales Data Analysis include:

Optimize Data Visualizations

Visibility into sales performance management information is critical to helping all parts of the sales organization make better decisions. Optimize Data Visualizations™ delivers this level of visibility and insight into sales data. Key benefits include:

- Improve sales performance by delivering real-time insights to salespeople and sales managers.
- Increase sales operations team effectiveness with drill-down analytics that expose detailed exception data on compensation, sales objectives, quotas, and the other business processes within sales operations.
- Boost performance of the entire sales organization via management analytics that integrate data from Optimize with third-party systems like SFA or CRM.

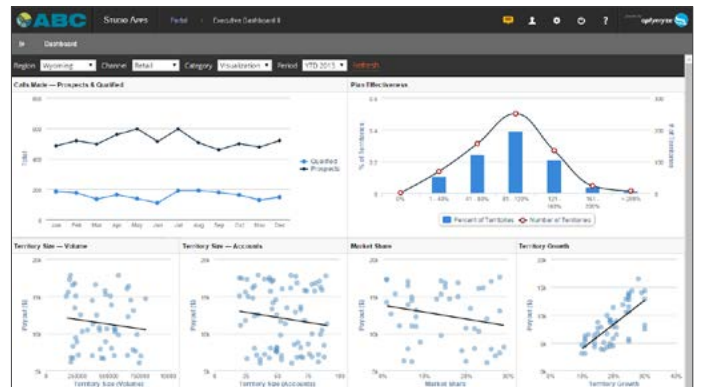


Optimize Sales Analytics delivered on iPad. Optimize provides support for major mobile platforms

Optimize Dashboards

Optimize Dashboards™ provides sales managers and sales people with immediate access to personalized analytics dashboards, so they can understand key business metrics at a glance. With Optimize Dashboards, you can:

- Easily create and roll out dashboards to users across the sales organization.
- Enable end users to personalize their dashboard, for example by choosing a visualization type, altering the dashboard layout, or creating multiple visualizations of a dashboard.



Optimize provides interactive dashboard analytics tailored to every role in the organization.

Optimize Reporting

Optimize Reporting™ enables sales operations to create and distribute reports of any type to sales managers and salespeople, who can then conduct their own analysis by personalizing the information. Optimize Reporting enables you to:

- Help sales managers make better and more informed decisions through personalized analysis of any report.
- Free sales operations from one-off reporting requests by empowering sales managers and sales people to do their own analysis.

Tailor Optymyze to Your Business with the Optymyze Sales Studio

Optymyze Sales Studio is a highly extensible, PaaS configuration environment that allows you to tailor the solution to meet your unique needs. It consists of two major components:

- Sales Process Automation
- Sales Communications

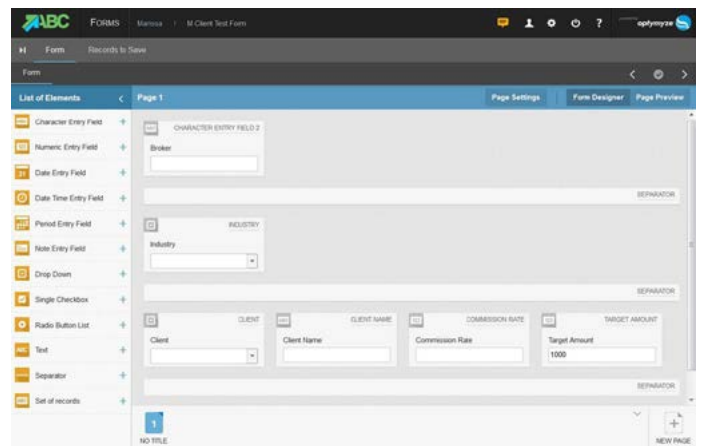


Sales Process Automation

Automating sales processes specific to your business or industry, and then packaging them into custom apps not only makes your sales organization more efficient, but it also generates information to help you maintain a competitive advantage. These apps, for example an Account Planning app or a Configure, Price, Quote (CPQ) app, are often used by a large part of your sales organization, and require complex workflow and calculations to be successful. The following components are included in Sales Process Automation:

Optymyze Forms

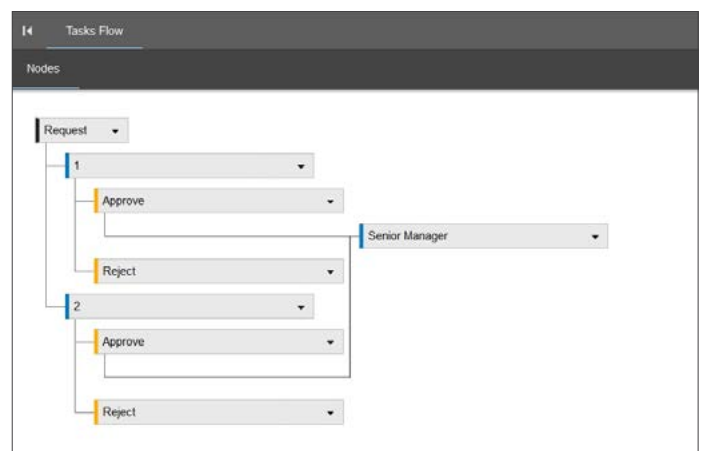
Optymyze Forms™ lets you create user interfaces for custom apps that work equally well on laptops and mobile devices, and that collect information for use in the applications. Optymyze Forms is designed to work with other components of the Optymyze Sales Studio, so the user experience of your custom application is no different than the main application.



Optymyze Workflows

Effectively automating any business process requires robust workflow capabilities. Optymyze Workflows™ lets you model any business process through an intuitive drag-and-drop designer, creating workflows that are as simple or complex as necessary. Key benefits include:

- Improve organizational efficiency and productivity for business applications.
- Reduce operational costs by eliminating errors associated with manual processes.
- Demonstrate better corporate compliance through an audit trail of workflow actions.



Optimize Views

Timely, easy access to information is an essential foundation for any successful SPM application. Optimize Views™ enables custom apps to generate unlimited views of data in the system. It includes several common view types out of the box (e.g. a Dynamic Report view) so business analysts can easily provide salespeople access to vital information and enhance their user experience. Also, the library of common views gives users timely access to information and clearer insights into the business. As a result, Optimize Views provides the following benefits:

- Increase user adoption of custom apps.
- Improve the quality of decisions users make.
- Drive better sales and business outcomes.

Sales Communication

Enabling your sales force with information, anytime and anywhere, is central to today's sales process. Sales Communication lets you configure apps with any kind of sales-related information, personalized to your sales users. The key components of Sales Communication include:

Optimize Portals

Decades of practice have proven that intuitive interfaces increase user engagement. Optimize Portals™ is an easy-to-use workspace for business users to rapidly build a portal for any app. Optimize Portals also lets business users house as many apps as needed in a single portal making it easy for sales people and sales managers to find the apps they need.

Optimize Messaging

Easily and conveniently share administrator or system messages with all users. Optimize Messaging™ can also manage acceptance agreements and other documents requiring electronic approval.

Optimize Collaboration

Collaboration is a key requirement of any modern business app. Optimize Collaboration™ provides business users a set of third-party and native collaboration capabilities that can make any app more engaging. From Yammer™ and Twitter™ to activity streams, business users can infuse their apps with collaborative tools to drive engagement and knowledge sharing.

Improve the Process and Outcomes of Sales Planning

Evolve your sales planning process from spreadsheets to Optimize Sales Planning™, a unified sales planning platform that brings together all data from different sources and allows you to easily build an integrated sales plan to ensure your goals are achievable. Optimize Sales Planning is made up of two capabilities:

- Sales Modeling
- Sales Scenario Planning



Sales Modeling

Bring together data from across the enterprise to create a real-world sales model for planning, budgeting, and forecasting, and to determine which operational sales decisions will lead to the best outcome. Share sales models with others across the organization and collaborate on different scenarios.

Optimize Modeling

Complete model development environment for sales operations and sales management to create and manage the lifecycle of sales models, including all business rules, interdependencies, assumptions, and dimensions necessary for analysis and segmentation. Optimize Modeling™ ensures your sales plans will achieve their objectives.

Optimize Model Data

Successful planning requires access to data across the enterprise, including historic sales, customer data, sales headcount, and financial information. Optimize Model Data™ allows customers to automate the process of extracting, validating, transforming, and loading data into the model from any part of the enterprise.

Optimize Model Views

The end result of sales planning is only as good as the information that goes into the model. Optimize Model Views™ lets you input data into your sales plan, and also create and manage different views into the sales plan, according to users' roles.

Sales Scenario Planning

Sales Scenario Planning enables business users to easily create, analyze, and collaborate on an unlimited number of scenarios that are based on existing models developed in Sales Modeling. This allows sales management to simulate different scenarios, preview the results, and then make the best operational decisions.

Optymyze Scenario Planning

Optymyze Scenario Planning™ lets you create new scenarios and manage existing scenarios that are based on an existing model. Scenario Planning permits all members of sales management to collaborate on different scenarios in order to create the most effective sales plan.

Optymyze Scenario Inputs

Key to modeling scenarios is collecting and managing the inputs from different participants in the sales planning process. Optymyze Scenario Inputs™ lets managers quickly and easily manage data and other inputs from planning participants, and then run different scenarios to select the outcome which is best for your business.

Optymyze Scenario Analysis

Optymyze Scenario Analysis™ provides a complete set of scenario visualization capabilities. This enables members of the sales planning process to analyze various scenario results and pick the one that will yield an optimal sales plan for the organization.

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