

SOLUTION BRIEF:

# Enabling Sales Organizations with a Unified Sales Operations Platform

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LEVERAGE EMBEDDED COLLABORATION TO DRIVE BETTER SALES  
ENGAGEMENT & ALIGNMENT

Growing sales organizations face many, various challenges. Sales operations teams wearing multiple hats are usually tasked with navigating all of them. Optomyze's single, unified sales operations platform helps navigate them efficiently, while maintaining a strategic focus on maximizing sales performance. There are many benefits to implementing the Optomyze solution, but in this solution brief we will focus on those derived from its embedded collaboration capabilities.

## CHALLENGES

As companies grow their sales organizations, they need to make sure that sales operations are able to support the growing sales forces, and properly handle the resulting, more complex sales processes. Otherwise, sales organizations can fall victim to miscommunication and lack of transparency, which, in turn, can lead to misalignment between sales objectives and company initiatives. In the long run, misalignment can affect sales productivity and performance.



## SOLUTION

To help address these challenges, Optimize proposes a unified, collaborative sales operations solution. The Optimize Sales Operations platform leverages industry expertise, and brings together core SPM functions. It embeds collaboration capabilities, and seamlessly integrates around well-defined business processes.



## BENEFITS

- Highly scalable and flexible infrastructure.
- A single source of truth for all SPM data.
- Better alignment between sales objectives and company initiatives.
- Increased sales engagement and effectiveness.
- Improved overall sales performance management.



As sales organizations grow and become more dispersed, sales operations teams start facing various challenges. Designing and implementing sales compensation plans, assigning sales territories, setting quotas and objectives, and measuring the overall sales performance become increasingly complex processes. If not managed properly, they can lead to misalignment between sales objectives and company initiatives, conflicting work, frustration and lack of motivation among sales reps – all of which can hinder sales productivity and performance.

Sales performance management (SPM) tools and functionalities can help streamline processes, and scale up sales operations teams – so they can keep up with growing sales forces and more complex processes. However, having various SPM tools in place is not enough. If not properly integrated, they can lead to siloed application systems that can disjoint inter-related SPM processes, and also siloed teams with diverging or overlapping goals. At the same time, tools and applications can be good business process enablers, but sales operations teams need to know how to best internalize them and maximize the effectiveness of the resulting “tool-enabled” processes.

A unified set of SPM applications can make the difference between highly efficient sales operations that drive sales effectiveness and further inefficiencies that slow down growth.

A truly unified platform ensures all applications are integrated around a single codebase, database and business process, which translates to scalability and flexibility to add new functions as needed. But it goes well beyond seamless integration of applications, it embeds collaboration capabilities to streamline communication, increase transparency throughout the organization, boost sales engagement and improve sales alignment. This leads to motivated sales teams and greater sales performance. In the long run, adopting a truly unified platform translates to massive cost savings and higher sales productivity.

In what follows, we will look at how Optymyze helps growing sales organizations drive efficient sales operations with a single, unified platform that facilitates collaboration.



# THE OPTYMYZE APPROACH TO EFFICIENT SALES OPERATIONS:

## A Single, Unified Sales Operations Platform, Facilitating Collaboration

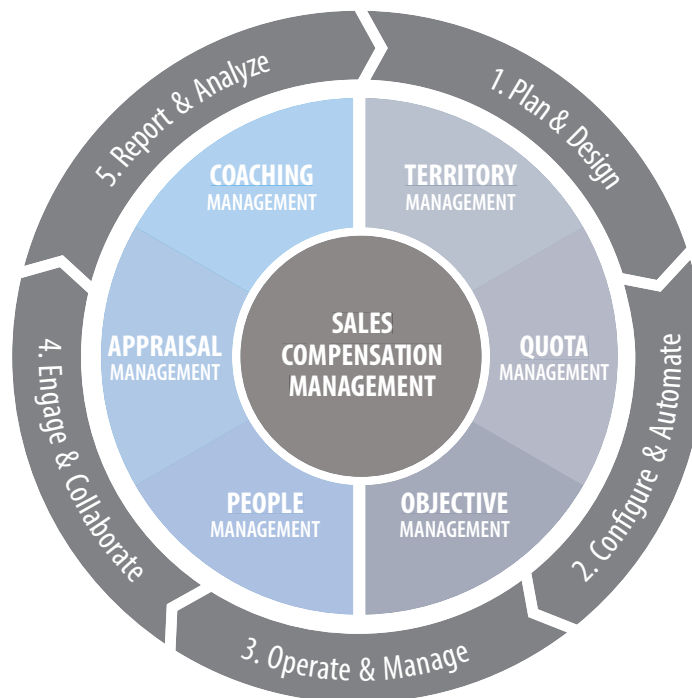
The [Optimize approach](#) brings together **industry expertise** from experienced SPM business consultants, a **collaborative business process management model** uniquely developed based on industry best practices, and award-winning **enabling technology** – all in a single platform.

The Optimize Sales Operations platform leverages the elasticity, agility, and cost benefits of cloud deployments, as well as over 25 years of SPM experience, to deliver a unified platform that effectively delivers on everything from sales

performance management, to sales planning, to sales analytics and reporting.

Unlike traditional vendors patching together SPM applications and functionalities, Optimize has built this robust solution from the ground up, integrating core SPM capabilities and boosting their time-to-value with embedded collaboration.

Here is a glimpse into how this unified, collaborative platform works, and how it can benefit your sales operations.

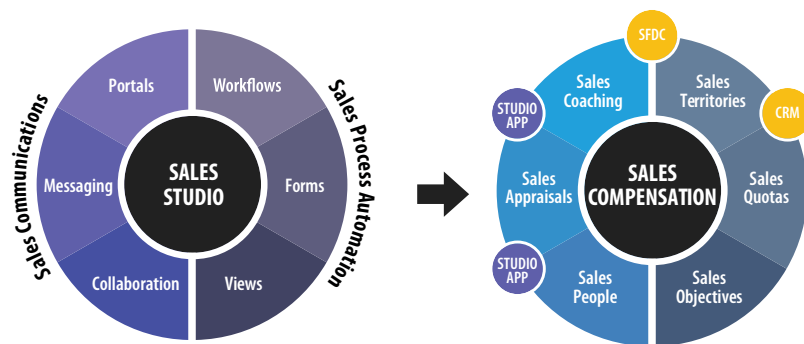


*Sales Operations Process Management*

## Fully integrated sales operations platform

The **Optimize Sales Performance™** solution includes cloud applications that enable business analysts to quickly implement and manage a wide range of SPM processes, often starting with sales compensation management, and then extending to include processes like territory management, quota management and objectives management.

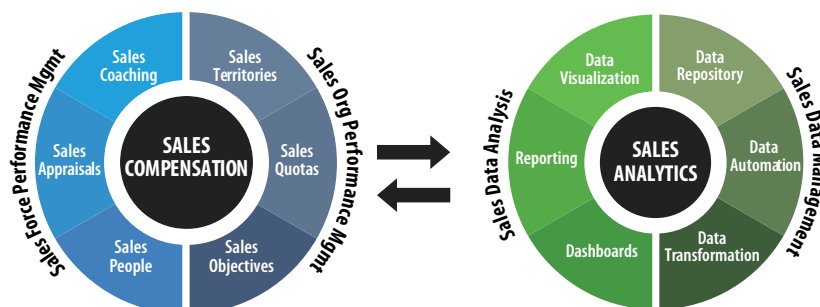
At the same time, **Optimize Sales Studio™** provides cloud applications that enable non-technical business analysts to build and deploy additional sales cloud applications, and to integrate third-party apps from Salesforce, Microsoft Dynamics, and others. **This allows sales operations teams to tailor their sales performance solution to specific company needs, and scale up their activity.**



*Optimize Sales Studio and Optimize Sales Performance*

Underlying all Optimize Sales Performance™ applications is **Optimize Sales Analytics™**. This suite of cloud applications provides data management and analytics capabilities that allow access and visibility to key sales data, for the entire sales organization to leverage. For instance, sales operations teams can use information from the Optimize Sales Performance applications, as well as draw data from third-party applications such as CRMs, to create consolidated reports for sales managers. **This translates to faster time-to-value, and having a single source of truth for all SPM activities.**

Leveraging the Optimize Sales Performance applications, sales organizations can **create their very own sales performance ecosystem**. However, this ecosystem would not be fully functional without **collaboration capabilities**.



*Optimize Sales Performance and Optimize Sales Analytics*

## Embedded social collaboration

More business leaders are starting to acknowledge the benefits of employee collaboration: from increasing organizational agility, to sparking innovative ideas, to aiding decision making. As a result, more companies are moving towards more collaborative business models, embedding social collaboration tools into business processes, and incentivizing collaborative behaviors. To support these trends, and to help sales organizations maximize the benefits of collaboration, we have integrated extensive collaboration capabilities and social features in our platform.

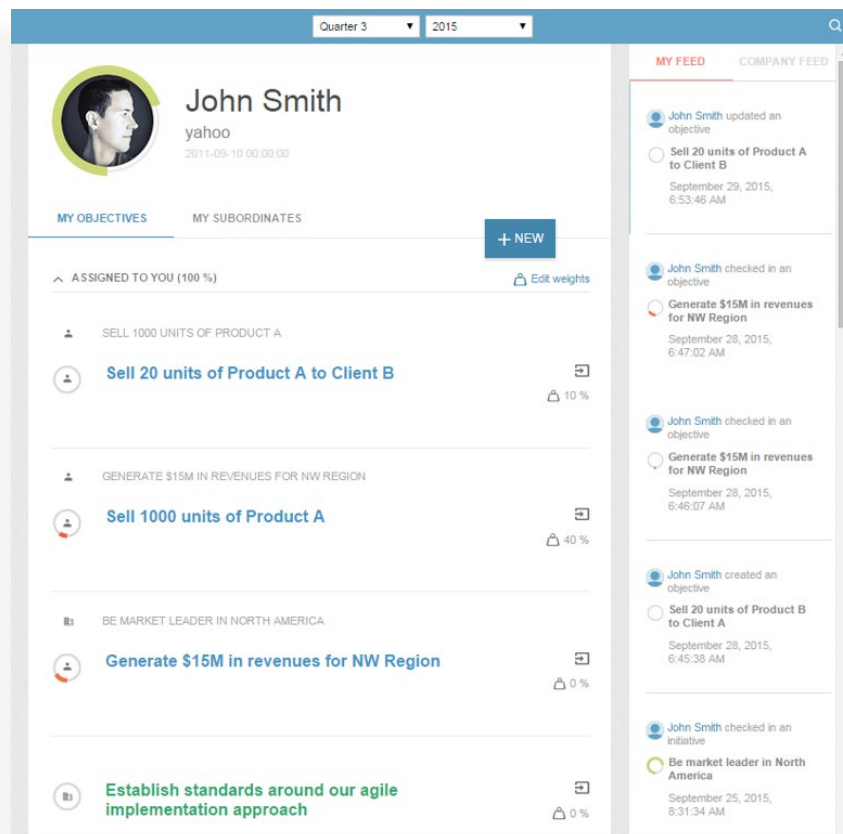
For instance, the Optymyze Collaboration application included in Optymyze Sales Studio provides a set of third-party and native collaboration capabilities that can make any application more engaging. From Yammer™ and Twitter™ to activity streams, users can infuse their applications with collaboration capabilities to drive **engagement and knowledge sharing**. They can also be found in the Optymyze Sales Territories and Optymyze Sales Quotas management applications, but the application that proves our commitment to social collaboration is **Optymyze Sales Objectives**.





Unlike traditional applications for setting sales objectives, Optimize Sales Objectives was designed with the benefits of social collaboration in mind, and includes social features such as:

- **Activity feeds**, both user activity and company activity feeds, to allow users to keep track of their conversations, and see what other team members or colleagues from other departments are up to.
- **Objective feeds**, to allow managers and subordinates to comment on objectives and their achievement, to change objective weights, and to check in progress updates.
- **Social actions**, such as “likes” and comments, to engage around achievements and actions.

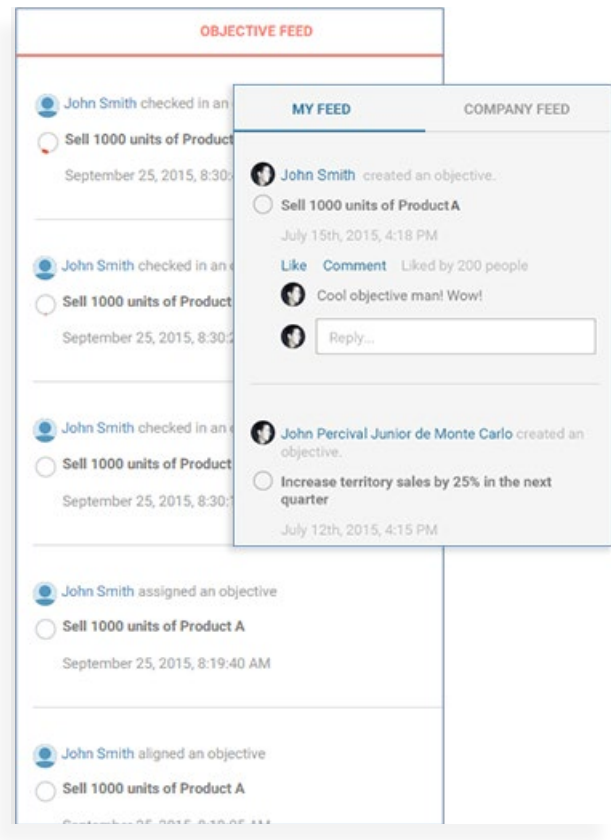


Collaboration Capabilities in Optimize Sales Objectives



Integrating these social features into a sales objective management application translates to various benefits, such as:

- Transparency into how each team or individual is contributing to overarching company goals.
- Better alignment of sales reps' objectives with corporate initiatives.
- Increased focus on achieving sales objectives.
- Improved team collaboration.
- Enhanced sales effectiveness through direct feedback on sales rep performance.
- Improved sales operations efficiency by streamlining the collaboration process and tracking progress.
- Improved organizational performance through better salesperson engagement.
- Higher motivation through objectives-based compensation and bonuses.
- More transparency into reasons for awarding sales incentives.
- Continuous approach to performance management.



Social Features in Optimize Sales Objectives

Alignment between sales objectives and company initiatives is key to realizing desired company outcomes. Proper alignment eliminates redundancy and conflicting work, focuses sales reps' energy, and ensures the entire organization is moving towards the same goals.

In a way, setting sales objectives is a strategic process that greatly benefits from company transparency – for everyone to know why they're doing what they're doing, and how everyone contributes to meeting company goals. And social collaboration can enhance transparency.






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## FINAL THOUGHTS

A global study by Avanade<sup>1</sup> shows that 82 percent of businesses currently using social collaboration tools want to use more of them in the future. IDG also reports<sup>2</sup> “increased use of collaboration and communication tools” among millennial workforce as one of the trends shaping future business strategies. As you grow your sales organization, bear in mind that this millennial workforce will be the source of your future sales talent. Thus, employing a unified sales operations platform with embedded collaboration capabilities will help you meet their needs. In return, you will benefit from better sales engagement and alignment. At the same time, the fully-integrated, highly-scalable, and easily-configurable sales operations platform will result in greater sales effectiveness and productivity, higher flexibility and cost savings.



For more information, please visit the [Optymyze Sales Performance](#) webpage. Or talk to a sales performance expert directly: – [click to engage](#).

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<sup>1</sup> “Global Survey: Is enterprise social collaboration living up to its promise?”, Avanade study: <https://www.avanade.com/~media/asset/point-of-view/social-collaboration-global-study.pdf>

<sup>2</sup> “Preparing for the Millennial Shift”, IDG whitepaper: [http://resources.idgenterprise.com/original/AST-0145474\\_RandstadIDG\\_WPmil0430.pdf](http://resources.idgenterprise.com/original/AST-0145474_RandstadIDG_WPmil0430.pdf)