

# Optimize unified, no-code platform cures pharmaceutical manufacturer's quota constraints



Savings of 3.2 full-time equivalent weeks per quarter



43% less time from receipt of inputs to final delivered quotas



Performance reports now delivered a week earlier

## SITUATION

A national pharmaceutical manufacturer creates therapies for the treatment of respiratory diseases and disorders of the central nervous system, such as anxiety, depression, epilepsy, and schizophrenia.

In 2017, the company launched several new products, doubling its product portfolio – a change accompanied by commensurate increases in the organization’s size and the complexity of its commercial processes, sales teams, and quota-setting process.

Almost overnight, they had gone – in the words of their Executive Director of Commercial Process Optimization – “from playing checkers to three-dimensional chess.”

## CHALLENGES

Due to the combination of the company’s forecasted growth and their heavily manual and labor-intensive process, their quarterly quota-setting was about to become an even greater struggle than before.

The sales directors were already investing an excess of time and effort into arranging calls with each sales team to set cascading quotas for the quarter. Coordinating these meetings across differing working hours and around other critical responsibilities was difficult, frustrating, and time-consuming. Inevitably, some stakeholders would be

absent, necessitating numerous follow-up meetings along with the stressful task of tracking and updating multiple Excel workbooks. Only after weeks of catch-up and hours of labor would quotas finally be set.

These inefficiencies led to significant delays in providing salespeople with guiding data and feedback, which, in turns damaged their ability to achieve company-wide goals.

## SOLUTION

As it turned out, the company's approach at the time meant that crucial data about team performance, quotas, and compensation was siloed among the sales team leaders, who were manually rolling their high-level data up to Excel spreadsheets. Thus, deep insights into their quota data were generally unavailable to company leadership – a massive strategic disadvantage.

Upon diagnosing this organizational roadblock, the company looked to Optimize to help automate its quota-setting process.

The company used the Optimize no-code starter application for quota setting and modeling and customized it to its needs. They added it to the already existing implementation of the Optimize unified, no-code platform. This eliminated time-consuming, company-wide meetings, and all the inefficiencies that came with them.

This application integrates seamlessly with the already existing Optimize Sales Commission Management, which brings significant efficiency benefits. It also provides the ability to communicate updated quota information to the field instantaneously and deliver in-the-moment coaching, which actually transformed the entire sales process.

Now, the company's sales directors and administrators log in to Optimize at their leisure and add their input to their teams' quotas, which is then rolled up automatically to team and territory-spanning quotas across the country. Rather than juggling individual availabilities, differing time zones, and endless document versioning, the company's sales leaders now enjoy real-time, simultaneous reviewing and editing of quotas.

## OUTCOMES

Implementing the Optimize solution has enabled the company to achieve major reductions in overhead. Leaner processes and more consolidated quota data have resulted in:

- savings of 3.2 full-time equivalent weeks per quarter, freeing up employees to pursue other organizational initiatives;
- a 43% reduction in time from receipt of inputs to final delivered quotas, which has increased responsiveness throughout the sales organization; and
- quarterly performance reports being delivered a full week earlier than was previously possible, leading to more targeted coaching.

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