

Cooperative Financial Services Group Advances Enterprise Efficiency Through Strategic Enablement Partnership



**Established a
recurring annual
strategic planning
cadence with
executive
leadership**



**Identified and
delivered cross-
functional
efficiency
initiatives beyond
commission
management**



**Reduced
operational
duplication across
sales operations,
finance, and IT
functions**

SITUATION

A large cooperative financial services group operated a complex enterprise environment with interconnected sales, finance, and technology functions. While commission management was a critical capability, leadership increasingly viewed sales performance as part of a broader operational ecosystem.

The organization sought a long-term partner that could support not only day-to-day operations, but also strategic planning and enterprise-wide optimization.

CHALLENGE

Sales performance processes touched many parts of the organization, making it difficult to drive meaningful efficiency improvements in isolation. Leadership needed a structured way to step back, assess the broader operating model, and identify opportunities to simplify, standardize, and scale processes across functions.

This required collaboration at the highest levels of both organizations, grounded in a deep understanding of how the platform and processes worked in practice.

SOLUTION

Optimize engaged as a strategic enablement partner, establishing an annual planning rhythm involving senior leaders from both organizations, including technology, operations, and executive leadership. These sessions focused on reviewing the current operating state, assessing upcoming business priorities, and identifying opportunities to drive efficiency beyond commission management alone.

Rather than prescribing solutions, Optimize facilitated structured discussions, shared best practices observed across the enterprise landscape, and helped translate strategic objectives into actionable initiatives. Between planning cycles, Optimize supported execution through advisory services and operational guidance.

OUTCOMES

The organization moved from reactive optimization to deliberate, enterprise-level planning. Sales performance became a lever for broader operational efficiency, with improvements extending into adjacent processes and systems. The enablement partnership supported both immediate execution and long-term strategic alignment, strengthening trust and collaboration at the executive level.

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Optimize provides a unified, no-code platform for enterprise sales performance management.

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