HOW TO CHOOSE AN

ICM YOUR COMP ADMINS WILL ACTUALLY USE

WHAT IS "EASY TO USE" REALLY?

Performio®

YOUR LAST

ICM

ALL YOU NEED, ALL IN ONE:

- PERFECT BALANCE BETWEEN DATA FLEXIBILITY & STRUCTURED PLANS MAKING CHANGES EASY & INFINITE
- SELF-MANAGEABLE ICM WITH AWARD WINNING PARTNERSHIP & SUPPORT
- STRAIGHT FORWARD DATA IMPORTING WITH NO NEED TO CHANGE YOUR DATA FORMAT

Performio® | **Press**

Remember insomniatic nights...

Where you'd flip on the television and maybe watch infomercials? These iconic pitchmen from Billy Mays, "Are you on the ball? Just toss and go, the Oxiclean ball does it all!" To Ron Popeil from the aptly named RonCo., "Just set it and forget it!" What was with that spray on hair?

Some pitches and products were better than others for sure, but they all did promise one thing, they were easy to use and brought value to your life because of it. Now when it comes to software, and especially incentive comp, being easy to use is all relative. The countless streams of data, how that data is managed, and the UX that helps you manage said data all come into play.

Nearly every software vendor claims that its products are "easy to use." But what does that really mean? Obviously, not all software is equally easy to use. And is ease of use really the most important factor to consider?

When it comes to Incentive Compensation Management (ICM) software in particular, the "ease of use" claims can be particularly confusing. Everyone says their solution is easy to use, but what they mean by that can differ wildly.

In this ebook, we'll take a look at the "ease of use" claim for ICM software, consider what it should mean, and explain what it does mean for **Performio's ICM**.

Balancing Ease of Use with the Ability to Handle Complexity

Let's start with an analogy. Which would you say is easier to use: Microsoft Paint or Adobe Photoshop?

Most folks would say Microsoft Paint is easier—and depending on what they mean by that, it would be the correct answer. Pretty much anyone can open up Microsoft Paint, and with no training whatsoever, perform basic image editing tasks. The interface is simple, there are no complicated menus to sort through, and everything more-or-less works as you'd expect it to.

However, what if you're tasked with a more complicated edit? Say you need to remove a person from a photo without any noticeable distortions left over. Suddenly the "easy to use" program is not so easy after all.

Microsoft Paint is only easy to use because it's very basic. Its limitations make it "easy to use" due to having relatively few capabilities to choose from. The program simply isn't designed to handle more complex tasks.

By contrast, Adobe Photoshop is a more complicated program. It does have a bit of a learning curve before you can use it to its fullest potential. But in the long run, it's actually far easier to use the more complicated program than it would be to try to do complicated tasks in the "easy to use" program.

Keep this balance between ease of use and complexity in mind as we now tackle ICM software.

Determining if ICM Software is Truly Easy to Use

For some ICM vendors, when they say that their software is "easy to use," they mean it in the Microsoft Paint sense. The interface is slick and uncluttered. The options are simple and straightforward. And if the sales commissions you need to calculate are very simple, then their software may indeed be "easy to use."

But an easy-to-use interface doesn't mean that a product can easily do everything you need. You need an ICM solution that not only has a simple interface, but can also handle complex sales comp plans. And even if your plans are simple enough right now, that's guaranteed to change as your business grows and expands—and there's nothing simple or easy about being forced to change vendors down the road because your current solution ran out of steam.

You want to choose a solution now that is easy enough to use—even if there may be a little learning curve—and that will be able to keep up no matter how complicated your sales processes, plans, and commissions become.

With all that in mind, here are the key areas to check on whether an ICM solution is truly easy to use.

There are basically three ways that various ICM solutions approach sales comp plan management: with **formulas, rules, or components**. And the three options come with very different ideas about what it means to be "easy to use."

Formulas work more-or-less the same way they would if you were **managing sales compensation in Excel**. The only way they could be considered "easy" is by virtue of familiarity—if you're used to doing ICM in spreadsheets, then formulas may feel comfortable. But there's nothing really easy about it. You have to learn the formula syntax, manually write out all the formulas, reference various data sets, and try not to introduce errors while doing so.

But errors will inevitably creep in, and when they do, "easy" is the last word you'd ever use to describe the process of tracking them down and fixing them. A single error could cause you hours to days worth of sorting through row after row and formula after formula to finally find it. And that's assuming you noticed the mistake before it caused you to send out inaccurate commissions. More likely, you'll then have to go back and issue corrections for all the payments that were sent while the error was in place.

Rules are an attempt to make this process a little easier. And they are a bit easier to use—but in that Microsoft Paint simplistic kind of way. With rules, rather than writing out formulas by hand, you use predefined parameters from drop-down boxes to create basic if/then statements for your plan.

This can work well enough if your plans are really, really simple. But the moment you need to introduce any sort of complexity into your plans, the rule-based system starts to fall apart. Suddenly the predefined parameters don't account for the specific elements you need. And the if/then conditions are too limited to include everything in one rule. So you start having to nest different rules inside each other. And then you have to keep track of the convoluted Frankenstein's monster of a system you've created. In the long run, there's nothing easy about this.

Components are Performio's way of finding that balance between ease of use and complexity. Like formulas, components allow you to handle any sales comp

plans, no matter how complex. But unlike formulas, you won't have to type everything by hand, introducing the risk of errors. And unlike rules, you aren't limited by the input method. There are no restrictions on what you can add or how big you can scale.

The graphical user interface requires no coding and allows you to build your plans with click-to-configure components and guided workflows. We include pre-built components to handle the majority of your needs, and you can build and customize additional components to handle anything else your sales comp plans may require. And all components are reusable, so if you've created it once, you can simply duplicate and modify it for future use.

|||||||| **Ability to Make Adjustments Yourself** ||||||||||||||||||||||||||||||||||||||

For some ICM solutions, the software is "easy to use" because the vendor actually makes all the changes for you. And if you have the time to wait for them to do that, then sure, easy enough. But understand that a relatively simple and routine change to a sales comp plan can often take weeks or even months for a vendor to get around to. Do you have that kind of time to wait?

This is one of the biggest complaints our customers cite about their previous solutions when making the switch to Performio. The market, the economy, business objectives, and customer preferences are all dynamic. To stay competitive, sales leaders must be agile, ready to pivot quickly in response to changing demand. If you're waiting months at a time for every change to your sales comp plan, you'll be lagging far behind the competition.

"Agility, responding and pivoting quickly to ever-changing demand makes Performio *THE* ICM leader."

And that's not to mention the fact that most vendors will charge you for every change you make.

Here at Performio, we firmly believe in empowering our customers to make changes to their sales comp plans themselves. Everything is accessible for you to use, without having to wait (or pay extra) for us to step in. Of course our friendly support staff is always available to help whenever you want to reach out to us! And we pride ourselves on quick response times in those cases.

For example, Performio admins can easily edit components and modify performance measures payees are being paid on. Performio admins have total control of how the component produces a payable — whether we're measuring against an annual target or quarterly goals, what frequency the component releases commissions (for example, monthly or quarterly), the weighting of my component against the overall plan, and so forth.

"Wow, self-service ***and*** top-tier customer support? It sounds too good to be true, but ***that's*** the Performio difference!"

Breaking ICM News

PERFORMIO IS THE END-ALL ICM SOFTWARE LEADER

Straightforward Data Import

You already have a lot of data that you'll have to import into whatever ICM solution you adopt. And you have that data stored in your own particular way, based on whatever columns of information are most important to the particularities of your business.

But when it comes to uploading that data into a new system, you have to find a way to get the new system to understand and incorporate it. And chances are pretty good that the new system won't already be formatted exactly the same way as your existing data. For many ICM solutions, that means you need to modify all your existing data yourself to match it to the new system's format before you can upload it.

That's enough of a hassle for a single file of data, but depending on how long you've been in business, we could be talking about hundreds or even thousands of files to modify. And then a new set of files every month after that. This is hardly an "easy" process.

We don't think you should have to do any modifications to your data before importing them into Performio. Instead, we'll take a look at your data as it exists, and we'll adapt the system to understand it automatically. You can keep using whatever format you've been using, and upload it seamlessly. Now *that's* easy.

Accessibility by Anyone on Your Team

Performio makes it easy for comp admins to create reports for executives and managers and personalize dashboards for participants. Which then leads to a number of different use cases for other members of the team. Because of this, it's easy to raise disputes (on individual transactions) and handle conversation, resolution, and exceptions approvals all within the Performio platform (without needing to handle multiple emails).

Sales comp admins aren't the only people using ICM software. Sales leaders and executives use it to view reports, keep an eye on performance, and make approvals. Finance and compliance use it to identify and deal with exceptions. And sales reps use it to keep track of their progress toward quotas and goals, to

compare their performance against other sales reps, and to resolve disputes when necessary.

Or at least all of these folks would use ICM software if the tool were accessible for them. But far too often, ICM solutions come with clunky UIs that are geared entirely toward the specialist sales comp admin and are impossible to navigate for anyone else. And when it's too difficult for others to learn and use, they simply won't, and then you don't get the benefits of them all being on the same platform.

Performio built our ICM solution with the whole team in mind. We designed every feature and dashboard to be intuitive and easy to learn no matter who is using it. And role-based access ensures that while everyone can see what they need, no one can see what they shouldn't.

"*No more micromanaging*.

Performio's ICM gives you the confidence and peace of mind to focus on priorities...

It's just that easy"

How Performio Balances Complexity and Ease of Use

You don't need to take our word for it. **Our customers** continually give us feedback about how easy Performio is to use without sacrificing complexity.

Take **Service Express**, for example. When this IT service management company needed to transition away from their in-house solution, they surveyed the landscape of ICM software, and found that most options simply couldn't handle the particular challenges they faced. Brian Maring, Senior Financial Analyst at Service Express, put it this way:

"When we brought up those challenges, most of the other companies scratched their heads and were like, 'Yeah, we're going to have to think about how to incorporate that.'

But Performio quickly *understood* it.

So much so they actually showed us how they'd handle this scenario in one of the demos we walked through."

But does that mean the added complexity made our solution difficult to use? Hardly! Here's what Brian had to say once Performio was up and running:

"Before, we'd send our sales team to an internal website. It looked like a spreadsheet and was a bit clunky. Sort of a 'Here's your commission page.' And if there were errors, it would take about a day and a half of one person's time to correct them every month.

"Now with Performio we post a simplified, color-coded summary view, but with dashboards built out on additional tabs. Our sales team can see the detail behind the summary, even each line item if they'd like to. We've gotten great feedback from sales about the look and the feel.

"We've been able to build out some really nice reports to allow them to see into their commissions easier. Which really helps them do their job better and offers us a lot of scalability and options to analyze new plans. For instance, in the past we never had the ability before to future date a planned change; now we do.

"Today errors are really a non-event. We made sure all of the actions we used to take outside our old system would be automated in Performio. So that's been a huge time saver. Plus, as we're recruiting and onboarding new sales reps, it's really nice to have something that looks as good as Performio does.

"**Bottom line:** *There's just so much more we can do with Performio.*"

See Performio for Yourself

Whether your business is just starting out, or already facing complex sales compensation needs, you're going to need an ICM solution that is easy to use now, and will continue being easy to use at any scale.

Performio empowers your whole organization by making ICM simple enough that anyone can use it, while being powerful enough to handle any level of complexity.

Performio is the last ICM software you'll ever need.

It allows you to manage incentive compensation complexity and change over the long run by combining a structured plan builder and flexible data management, with a partner who will make you a customer for life.

Want to see what Performio can do for your organization?

Request a demo today!

Schedule A Demo

Call in the next 20 minutes, and we'll super size your incentive comp package with...

Wait— this is just themed an infomercial, it's not actually one. Discover the unique balance of flexible data management and structured plans making Performio...

The last ICM you'll ever need.