



# Transportation & Logistics ICM

Incentive Compensation Management

# Buyers Guide

Choosing an ICM vendor is a big commitment. The right solution will set you up for success for years to come, saving you time and money. But the wrong solution is a strain on your valuable time, resources, and money, causing more headaches and challenges both in the short and long-term.

And when it comes to the Transportation & Logistics industry in particular, there are specific requirements an ICM solution must be able to handle in order to meet your unique needs and provide true value.

Performio has worked with some of the biggest names in Transportation & Logistics, including [Uber Freight](#), Bluegrace, [Jillamy](#), and Trinity. We've seen how much value a good ICM fit can bring—and we've also seen the problems a generic ICM can cause in this industry. We encourage you to explore all available options, and we've put together this buyer's checklist to help you compare them.

**“This software has cut down on my workload, significantly reducing the week-long process previously spent in Excel.”**

**—Leslie Hatfield, Manager Benefit Accounting, [Uber Freight](#)**

## **The ICM Buyer's Guide for Transportation & Logistics Organizations**

You need software designed to manage the unique metrics and complexities of Transportation & Logistics incentive compensation.

You need an ICM that:

**Understands transportation & logistics incentive comp challenges and compensation plan complexity**

Navigating incentive compensation for the Transportation & Logistics industry means facing a myriad of challenges. The complexity of plans and intricate crediting are impacted by convoluted relationships between different companies they're doing business with such as vendors, customers, competitors, and partners. Balancing incentives for both agent and broker sales adds yet another layer of complexity. Frequently changing load values, sometimes months after the load was delivered, requires a robust system that can process huge volumes of data.

Yes, at Performio we know these pains all too well. The good news is that a well-chosen ICM solution can make it significantly less complicated to handle.

## Performio helps **Transportation & Logistics** solve their **incentive comp challenges**

Handling Clawbacks,  
Draws & Guarantees



Frequent  
plan changes  
& modernization



Balancing agent  
& internal sales



Complex and high  
volume data



Complicated  
& complex crediting  
with splits & adjustments



Varying commission  
rates by customer  
and time of acquisition



Sales results  
visibility & dispute  
resolution for agents



Talent attraction  
& retention



Manager reporting  
& Strategic Insights  
for Executives



## Handles gross margin, load count, shipments, collection, and other essential transportation & logistics metrics

Some ICMs only come equipped to handle a few generic pay metrics. But for a transportation & logistics businesses, it's crucial to choose a tool that can manage, track, and analyze the specific performance metrics you care about while handling many of them at once. Look for an ICM solution that can help you include metrics like listed below in your compensation calculations:

- Gross Margin
- Load Count, Shipments, Loads
- Delivery, Invoice or Collection
- Profit Per Load
- Revenue Per Load/Truck
- New Customers
- Net Income for Management
- Operating Ratio
- Empty (Unbilled) Miles
- SPIFs
- Hold & Releases
- Draws & guarantees
- Tiered Accelerators/Decelerators
- Strategic Sales Objectives (MBOs)
- Book of Business Growth
- Operating Income

## Has an established feature set built for the transportation & logistics industry

The ideal ICM solution should have abilities across the board that are specifically catered to the needs of transportation & logistics organizations.

Uber Freight



bluegrace

Bastian  
SOLUTIONS  
a TOYOTA ADVANCED LOGISTICS company

TRINITY  
A BURRIS LOGISTICS COMPANY

MODE<sup>®</sup>  
TRANSPORTATION  
A MODE Global Company

## Industry-specific capabilities and data models

Your ICM will need data models with built-in complex crediting functionality so the right people receive proper attribution for the sales they've made or contributed to, including crediting for agents, brokers, and managers. To do this accurately, it should integrate with leading TMS systems, Salesforce, and custom internal sources.

**Performio is ready to handle all of these metrics and more on day one. And our ICM solution is easily customized to track anything else you might need.**

## Extensive sales model support

Your ICM needs to support internal sales, partner/broker sales, and uneven territories. And it should include pre-configured transportation & logistics plans, accounting for commissions per sale, OTCs, and quotas for all roles, including:

- Carrier Sales/Broker/Account Manager/Sales Rep/Agents
- Team Leader, Manager
- Logistics Controller/Capacity Manager/Load Planners
- Carrier Development
- Outside Sales

## Customizable payout frequency

Additionally, the ICM solution must accommodate your plan's payout frequency, including monthly, quarterly, and annual quotas.

ICM solutions that fail to support the medtech industry in any of these crucial areas will create bottlenecks in your internal processes, forcing you to find additional solutions for features that should have been included in the first place.

**At Performio, we've intentionally crafted our ICM solution to include everything you'll need for transportation & logistics sales, incorporating all of these capabilities by default.**

## Allows self-serve changes and customization

[Developing a sales compensation plan](#) is a complex process, and setting up calculations for the plans can be even more complicated. Imagine you want to make one little change to your plan (such as adjusting a quota) - shouldn't be hard, right? A good ICM solution should be advanced enough to adjust the rest of your compensation plan with whatever tweaks you make, and not break any calculations.



Unfortunately, many ICM solutions fall short on this in one of two ways:

- A. The software doesn't allow you to make the changes yourself. Instead, you have to ask them to make changes for you—which can rack up fees for additional support.
- B. The software does allow you to make changes—but it's on you to make sure that those changes don't break other elements of your plan.

**Performio makes it easy for you to adjust your plans, and our software automatically updates any compensation elements that the change affects. You can make changes quickly by yourself, without breaking your compensation plan or dealing with additional fees.**

**That being said, we're always here to help with any changes if you'd like a hand or simply want us to handle it for you. But we leave that decision up to you.**

## Isn't a glorified version of Excel

We talk a lot about the importance of [moving away from spreadsheets](#) for managing sales commissions. The appeal is understandable, as they're inexpensive and easy to set up, and they typically work well enough at first if your team is small.

But the problems spreadsheets cause far outweigh the limited benefits:

- They don't scale well
- They aren't secure
- They can't handle too much complexity
- Data doesn't always sync correctly
- A single broken formula can lead to myriad problems downstream
- Troubleshooting is a nightmare

And while cloud-based spreadsheets make life a little easier, their fundamental weaknesses remain the same.

You'd think that any dedicated ICM solution would represent a radical departure from reliance on spreadsheets. But that isn't always the case.

Some ICMs are essentially built on top of spreadsheets. They may have a better interface up front, but at their core, they retain most of the same old spreadsheet problems. Too much complexity, and the whole thing breaks—all while costing substantially more than spreadsheets, and being even harder to troubleshoot.

**That isn't an upgrade.**

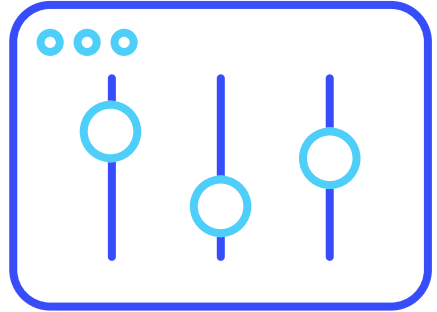
**Performio is built on a MySQL database, not spreadsheets. This gives us incredible flexibility to handle all your incentive compensation needs, no matter how complex a calculation may be. It's completely secure, and it scales to fit sales organizations of any size.**

“With Performio, we don’t have to change or transform our source data. Even though our comp plans are straightforward, we’re seeing major benefits and improvements.”

—Steven Stumpo, Vice President of Sales and Marketing, [Jillamy](#)

## Doesn’t require coding expertise to use

Being built on SQL is important, but it isn’t enough. Some ICM solutions that are built on SQL require clients to know SQL and have coding experience to use them. That’s like selling a car that only a mechanic can drive. It just isn’t a feasible solution for those of us who aren’t coders.



What you need is an ICM solution that harnesses all of the power of SQL—without you ever having to use SQL yourself. No coding. No scripting.

**Performio offers a streamlined user-friendly interface with powerful dashboards sitting on top of a robust SQL-powered database. You can certainly dip into the SQL *if you want to*, but you’ll never be *required* to know SQL to use our software to its fullest.**





## **Allows for automated workflows and advanced dispute resolution**

Managing incentive compensation requires a lot of collaboration that shouldn't be taking place over Slack or email. It's time consuming, it isn't secure, and it risks leaving people out of the loop or missing important details.

Instead, look for an ICM solution with built-in messaging and the ability to create complex workflows that allow managers to submit and get new plans approved by payees through technology integrations like DocuSign, and facilitate all disputes around payouts: requests, reviews, and approvals. This keeps the whole process centralized, ensures that all relevant stakeholders are included, and leaves behind an easy-to-follow audit trail.

It should also be able to handle dispute resolutions. When your sales reps have questions about their payments, they shouldn't have to bring their complaint elsewhere. The right ICM solution will let them create a dispute directly from the relevant payment. From there, a good ICM will notify the appropriate people and facilitate the whole resolution process—all within the same platform.

These aren't abilities you'll find in every ICM solution. And many of them require scripting and/or coding to provide workflow management. (See our previous point.)

**With Performio, all of this is built in out of the box. Your internal communications, workflow management, and dispute resolution can all be handled in one place.**

## Provides advanced analytics and reporting capabilities

ICMs generate an incredible volume of sales data. This could give you crucial insights for sales forecasting, strategy building, budgeting, training, and more—but only if it's accessible.

Some ICM solutions offer little help, handing you a pile of data with no easy way to harness it. Manually digging through the data is not only a waste of time, but it's also prone to human error. And what good are insights you can't trust?

You need reporting that's accurate, easy to use, and fast.

**With Performio Analytics Studio, you can always count on reliable reporting, and accessing it couldn't be easier. Our software uses natural language queries, so you can simply type what you want to see, and it'll do the rest for you.**

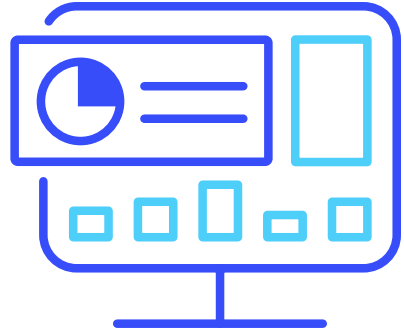
**This enables you to create custom views into your data, including graphs and other visualizations, reporting on any aspect of the sales process. Explore deals and commissions forecasts, multi-year deal bonuses visualizations, historical versus actual performance views, and anything else you can think of—our software handles it with ease.**

**"We use Performio to facilitate the monitoring payout alignments with goals achievement, for different roles with specific objectives. Performio enables us to create tailored plans for diverse areas, improving metrics and tracking performance."**

**—Shane Flanigan, VP of Digital Strategy, Trinity**

## Allows you to automate and customize reports for every key role on your team


Some of the reports you create will be one-offs, but many of them will involve data you'll want to continue tracking over time. Your ICM solution should allow you to automate the reports, setting them to generate a new instance at whatever frequency you define. That way, you only have to set them up once.



**Performio lets you automate your custom reports to keep track of all aspects of your team performance. Managers can review performance at the team and rep levels. Admins can review clawbacks and payment schedules. Executives can access a birds-eye view of the sales organization. And reps can see their performance and estimated earnings in real time, helping them stay on track toward their quotas and goals.**

**“The sales reps love Performio because it provides clear visibility into their commissions and they feel much more confident about the commission calculations,”** said Hatfield. **“Our executives including our Customer Care Ocer and our CFO are very pleased with Performio’s robust reporting functionality.”**

**—Leslie Hatfield, Manager Benefit Accounting, [Uber Freight](#)**



## **Gives reps full visibility to their commission in real-time so they can focus on performance**

Performio comes fully equipped with Participant Dashboards & Automated Commission Statements that gives both managers and payees full visibility on performance and commission payouts. Using Performio's extensive data visualization tools you can:

- Fuel Motivation through Transparency
- Monitor your performance and payments
- Easily raise payment questions with a convenient dispute resolution feature
- Unlock growth potential with what-if calculators
- Access all details via desktop and app for your convenience

## **Key questions to ask ICM providers**

Once you've identified a potential ICM vendor that meets your basic requirements, be sure to ask these questions before signing a contract. They'll help you avoid getting locked into a decision you may regret.

## What will this *really* cost?

When it comes to ICM solutions, be careful about taking a quoted price tag at face value. There are often hidden costs involved with getting a new ICM set up

Many vendors only provide a certain amount of integration by default, but as soon as things start getting too complicated, you'll be looking at additional fees just to get up and running.

Then there's the level of service you're subscribed to. If you've opted into a basic package, you'll soon find yourself needing more functionality, requiring you to upgrade your service at an additional cost. And if you ever need to make changes to your incentive compensation plans (which you will), many ICM vendors charge you individually for each change you make.

All this has a way of adding up to quite a bit more than it first appeared. Some of the "budget" ICM options can ultimately cost you more in the long run than those that seem more expensive up front.

So make sure you press a potential vendor for every fee you could encounter before committing to something that might expand beyond your budget.

At Performio, we believe in absolute pricing transparency. There are no hidden fees, and we will always make sure you know exactly what you can expect to pay.

## How long will implementation *really* take?

Much like the quoted price, a stated time frame for implementation is often merely a starting point. Depending on your company's size, the complexity of your needs, and the existing tech infrastructure in place, implementation could take months or even years longer than initially anticipated. And you may be required to do more of the work yourself than expected.

Ask potential ICM vendors what specific roles and responsibilities each party will have in implementation. That way you'll know exactly what you'll be required to provide. Check on the details of your current setup and future needs, and verify with the vendor whether any of it will cause delays or additional costs.

And be sure to ask vendors to provide their go-live rate—the percentage of their accounts that successfully complete the implementation process. A lot of vendors will take on clients even when they know they're unlikely to see it through to the end. Then their clients end up wasting time and money and having to start over from scratch.

Performio only accepts a client once both parties have high confidence in our ability to fulfill their needs in their anticipated time frame, resulting in a **go-live rate of 97%**—the highest in our category.

**“Performio did really well with the implementation. You're great listeners, you have great approach, you understand the requirements, you play it back and develop solution, and roll it a few days later. And you do show the intel. Each step along the way you provide us with confidence. The team is very knowledgeable and professional, and helpful.”**

**—Shane Flanigan, VP of Digital Strategy, Trinity**



## What internal efforts will this *really* require?

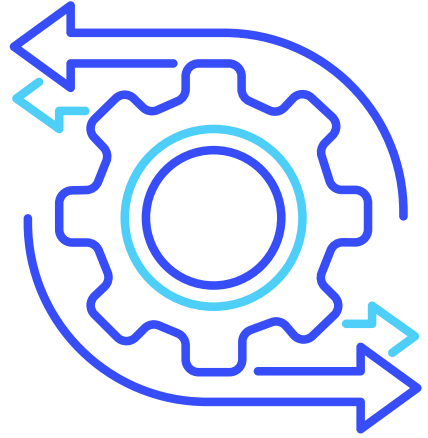
ICM implementation can be a complex process, and you don't want to be left having to manage it all yourself. Many ICM vendors offer “self-guided” implementations, which really just means you're on your own. You don't have access to a vendor expert to help you with the process—or if you do, it's at an additional cost.

Ask vendors how much of the implementation process you'll be responsible for. For example, can their ICM solution process your data as it currently exists? Or will you have to restructure your data to make it compatible with their solution? How much of your existing tool stack will integrate with their solution? To what degree?

For the transportation & logistics industry, this typically involves integrations with the following types of tools:

- Customer Relationship Management (CRM) systems like Salesforce, Zoho and Microsoft Dynamics
- Human Resources Information Systems (HRIS) like Workday and PeopleSoft
- Transportation Management Software (TMS) systems like McLeod, Aljex, TMW/Trimble, Turvo, and Mercury Gate

If your ICM can't automatically integrate with these systems, you'll be left paying for additional development, or you'll have to manually transfer data from one system to another—wasting time and resources while introducing human error.



**At Performio, we work with each individual customer to find solutions to difficult use cases. You'll have full access to our experts to guide you through the whole process and do the heavy lifting for you.**

No matter how your data is currently structured, we do the work to ensure you can integrate it seamlessly into our ICM solution. You won't have to restructure anything. And we offer full integration with transportation & logistics-specific systems right out of the box.



## Check all the boxes with Performio

You won't regret taking the time to research your options before committing to a vendor. Finding an ICM solution that fits your organization and meets every requirement will save you countless hours, improve productivity, provide added security, and give you peace of mind.

Feel free to print out this condensed checklist for reference as you proceed. The ideal ICM solution must:

- Manage, track, and analyze medtech metrics
- Have an established feature set built for the telecom industry
- Let us make simple changes ourselves
- Go beyond the limitations of Excel
- Utilize the power of SQL without requiring coding
- Allow for automated workflows and advanced dispute resolution
- Provide advanced analytics and reporting capabilities
- Automate custom reports for key roles
- Offer transparent pricing
- Stick to a reasonable implementation time frame
- Provide expert assistance with implementation

As you look around and compare your ICM options, we're confident that Performio will check all the boxes for your unique needs.

We built our ICM solution from the ground up to give you everything you need for incentive compensation management. Performio is easy to use, offers seamless integration with your data, requires no coding or extra services, provides transparent reporting and analytics, and keeps your data safe. And we stand by our product with unparalleled support.

### **About Beth Carroll, Prosperio Group**

Beth Carroll, CSCP, is the owner and founder of Prosperio Group. She is a recognized expert in incentive compensation plan design for the transportation & logistics industry, regularly speaking at conferences and writing published articles. She has worked with over 300 freight brokers to revise the organization structure and compensation plans, as well as many other types of companies in the Supply Chain world.

**Ready to see what Performio can do for your organization?**

**[Request a demo today.](#)**



**Performio®**