SD SALESDRIVE TECHNOLOGIES

TO MAKE **SALES** HAPPEN
YOU'VE GOT TO **DRIVE** IT

LIVE WEBINAR

Transform the Incentive Compensation Experience with Oracle and Partner Collaboration

- **Thursday, November 7 at 11:00 a.m. CT**

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GVP of CX Sales
Oracle

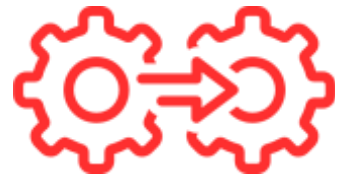**Vijay Bhamidipati**
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Mariner Wealth Advisors

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Mariner Wealth Advisors

Transition Challenges from Xactly to Oracle Incentive Compensation

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Integration Complexity

CHALLENGE

Integrating a new system across various departments and roles.

SOLUTION

Oracle Incentive Compensation's seamless integration with Grant Thornton and SalesDrive ensured a smooth transition without disrupting daily operations.

Training and Adoption

CHALLENGE

Training employees and third parties on the new system.

SOLUTION

Extensive custom report development to mimic previous system and user-friendly interfaces facilitated easy adoption of Oracle Incentive Compensation.

Data Management

CHALLENGE

Managing large volumes of incentive compensation data.

SOLUTION

Robust data management capabilities allowed **efficient storage, processing, and analysis of data for better decision-making.**

# Transition Challenges from Xactly to Oracle Incentive Compensation

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Compliance and Reporting

CHALLENGE
Ensuring regulatory compliance and generating accurate reports.

SOLUTION
Oracle Incentive Compensation **provided robust compliance features and custom reporting** to meet regulatory requirements and produce accurate reports.
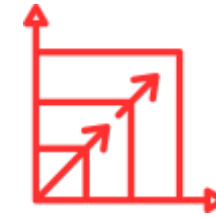
Customization and Scalability

CHALLENGE
Meeting unique incentive compensation needs and scalability.

SOLUTION
Customization options allowed tailoring the system to specific requirements, and the scalability ensured growth alongside the organization's needs.

Overall Impact
The transition from Xactly to Oracle Incentive Compensation was successfully managed, leveraging the comprehensive features and capabilities of Oracle's cloud application, alongside the support from implementation partners SalesDrive.
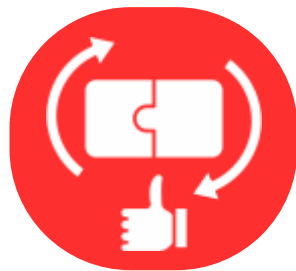
IMPLEMENTED SOLUTIONS AND TRANSITION

ORACLE INCENTIVE COMPENSATION IMPLEMENTATION

Partner	Users	Purpose
Salesdrive Technologies	545 within the organization	Replace the previous system to improve the management and effectiveness of incentive compensation for employees and third parties.

SUCCESS FACTORS

Alignment & Open Communication: Project Management

SalesDrive utilized the strengths of Mariner's project management office and resources to drive alignment, open communication, project planning, and staying within the timeline for the deliverables.

Flexible and Expert Support

SalesDrive provided significant flexibility and expertise, facilitating a smooth transition process.

OUTCOME

Successful Implementation

The transition was highly successful, leading to improved efficiency and effectiveness in managing incentive compensation.

Key Partners

The partnership between Mariner's Incentive Compensation Team, Project Management Office, and SalesDrive was instrumental in achieving a smooth implementation and transition from the previous system.

ACHIEVED BENEFITS AND ALIGNMENT WITH MISSION / VISION

SALESDRIVE TECHNOLOGIES

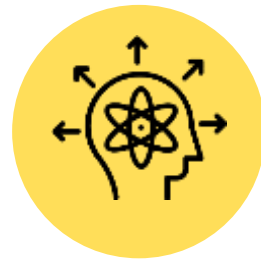|	**Quantitative Benefit**	**Alignment**
Cost Savings	Reduced cost of managing incentive compensation compared to the previous system.	Aligned with Company's mission of optimizing resource allocation to achieve financial success for clients.
Improved Forecasting	Advanced analytics for commissions enable better comparison of actuals and budgets.	Supports confident decision-making while navigating complex financial impacts.
Enhanced Tracking	Efficient tracking of advisor-managed business for greater visibility into performance.	Provides comprehensive reporting solutions to issue-spot operational deficiencies, and insights that drive performance-enhancing initiatives.
Improved Transparency	Real-time access to compensation details fosters transparency.	Reflects the commitment to transparency and fairness in financial dealings, supporting the company's mission.
Empowering End Users	Over 540 end users empowered with direct access to compensation details.	Supports the vision of empowering employees and stakeholders in their financial journey.

OVERALL IMPACT

The successful implementation of **Oracle Incentive Compensation, in partnership with SalesDrive Technologies**, has greatly benefited Mariner Wealth Advisors.

SalesDrive's flexibility, expertise and support enhanced the implementation process, ensuring a seamless transition and maximizing the solution's change impacts to end users.

This collaborative effort reflects Mariner Wealth Advisors' commitment to leveraging technology for positive outcomes aligned with its mission and vision.

WHO WE ARE

Leading Provider of Oracle CX Solutions

With over 100 years of combined experience, we specialize in modernizing incentive compensation processes. Our dedicated team is committed to optimizing sales processes and aligning technology solutions. We bring a fresh and efficient approach to modernizing business processes. Leveraging Oracle's renowned platform, we ensure smooth transformation and facilitate growth

Provide sales performance insights for informed decision-making and improvements.

Inspire teams with cutting-edge technology to drive sales and achieve unprecedented targets.

Ensure measurable improvements in your sales performance through our commitment.

Optimize sales processes, streamline workflows, and enhance sales for achieving business objectives

WHY CHOOSE US?

Reliable

Proficient

Precise

Empowering

Scalable

- Comprehensive Services

- Digital Transformation Experts

- Industry-Focused

- Scalability and Revenue Growth

HOW WE CAN HELP YOU

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- **Build business value cases for executive buy-in.**
- **Current process and system review and documentation.**
- **ICM technology implementations.**
- **Analyst enablement to move from tactial to strategic roles.**
- **Staff Augmentation**
- **Managed Services**

The Details

Team composition

Over 50 consultants worldwide with experience ranging across different CX modules

Expertise

Specialization in Oracle CX configuration and reporting and integration

Experience

Thought leaders in each domain with an average of a decade experience across all resources

Worldwide
CX Incentive Compensation
CX Configure, Price and Quote
CX Salesforce Automation

CUSTOMERS BY INDUSTRY

Insurance
Life Sciences
Food Industry
Hitech
Health Care
Manufacturing

EXPERTISE

Incentive Compensation
Eloqua
Sales Cloud
Subscription Management

FIVE STAGE SERVICE METHODOLOGY

EVALUATE

IMPLEMENT

ACCOMPLISH

SUPPORT

SUGGEST
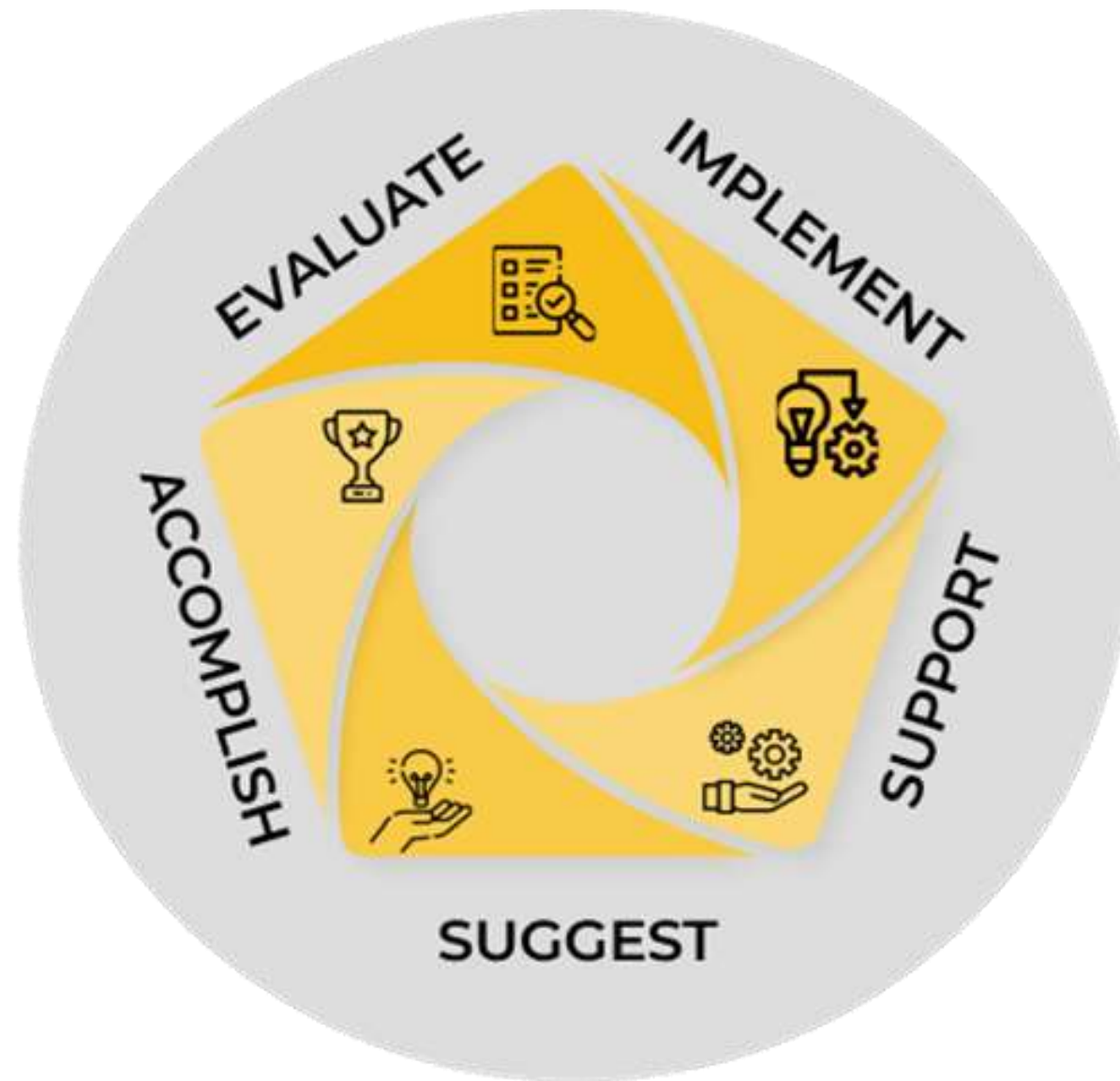
OUR FULL CYCLE EXPERTISE

Salesdrive's Unique Ability for Remarkable Results

- Full Lifecycle Implementations
- Dedicated Support
- Unparalleled Understanding
- Overcoming Challenges
- Setting Bar High

SDT'S ORACLE CX IMPLEMENTATIONS

- Incentive Compensation Management
- Sales Performance Management
- Territory and Quota Management
- Revenue Intelligence
- Analytics and Dashboards

SDT'S SOLUTIONS

Revenue and Subscription Management

Quote To Cash

Customer Experience

Digital Experience

Digital Engagement

Integrations

SALESDRIVE'S POTENTIAL

Cost reduction and Revenue growth

Strategic agility at every touchpoint

Effective automation for reduced human error

EFFICIENT PROJECT KICKOFF

Establishing Rapport and Understanding:
Analyzing Processes and Systems to Address Your Business Challenges

Understanding Your Challenges:
Collaboratively Crafting Solutions

Post-Signature Project Setup:
Assigning Project Team, Pre-Work, and Project Preparation

Introduction

Discovery

Proposal

Negotiation

Mobilization

Effective Requirements Gathering and Solution Demos:
Generating Insights for Crafting Proposals to Address Current Challenges

Collaborative Review, Alignment, and Execution:
Presenting the Initial MSA/SOW

SDT'S IMPLEMENTATION METHODOLOGY: AN OVERVIEW

SDT proposes a unique, modern, and adaptable approach that prioritizes customer comfort and is open to alternative methodologies. They advocate for an approach, which provides flexibility and control during the testing phase of solution implementation.

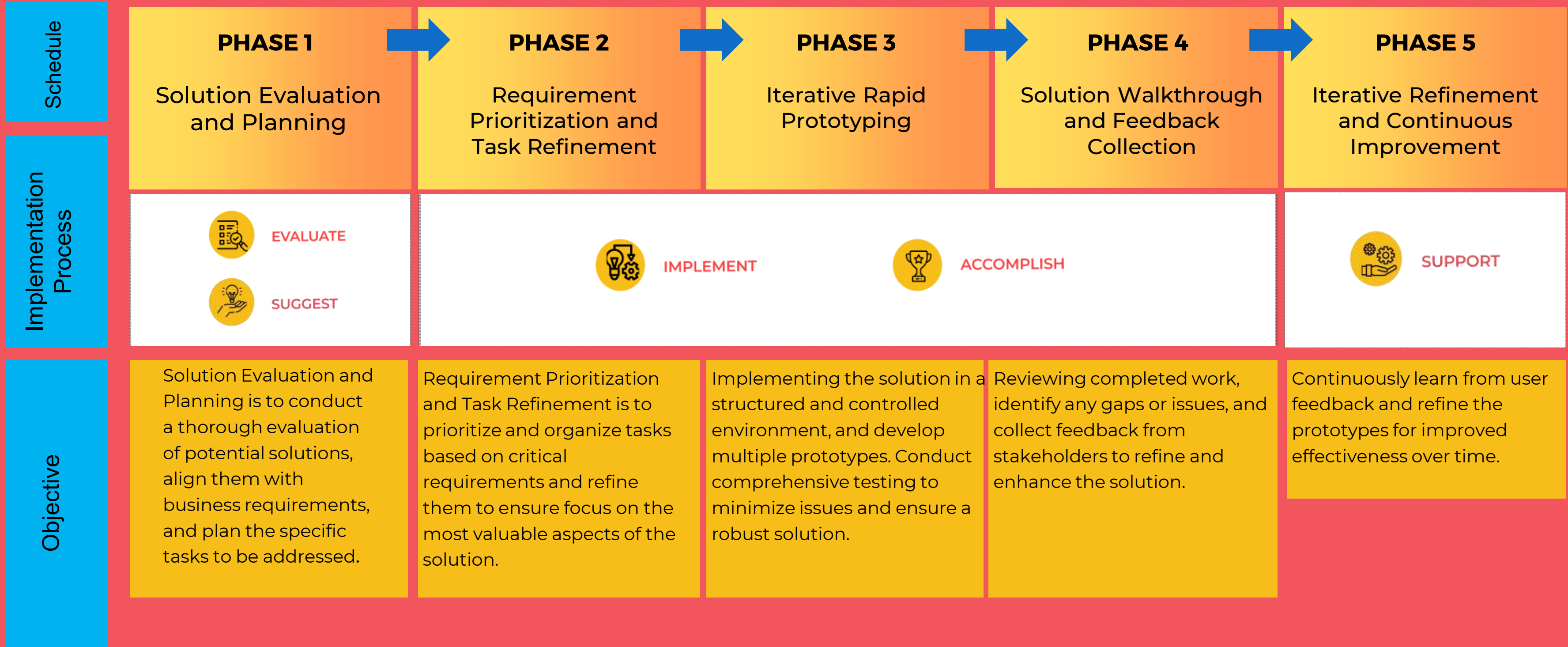|	PHASE 1	PHASE 2	PHASE 3	PHASE 4	PHASE 5
Schedule	Solution Evaluation and Planning	Requirement Prioritization and Task Refinement	Iterative Rapid Prototyping	Solution Walkthrough and Feedback Collection	Iterative Refinement and Continuous Improvement
Implementation Process	EVALUATE / SUGGEST	IMPLEMENT	ACCOMPLISH		SUPPORT
Objective	Solution Evaluation and Planning is to conduct a thorough evaluation of potential solutions, align them with business requirements, and plan the specific tasks to be addressed.	Requirement Prioritization and Task Refinement is to prioritize and organize tasks based on critical requirements and refine them to ensure focus on the most valuable aspects of the solution.	Implementing the solution in a structured and controlled environment, and develop multiple prototypes. Conduct comprehensive testing to minimize issues and ensure a robust solution.	Reviewing completed work, identify any gaps or issues, and collect feedback from stakeholders to refine and enhance the solution.	Continuously learn from user feedback and refine the prototypes for improved effectiveness over time.

Client SPM Blueprint

ICM core Capability Areas

- Strategic Design & Communication
- Quota Management
- Operational Support
- Compensation Administration
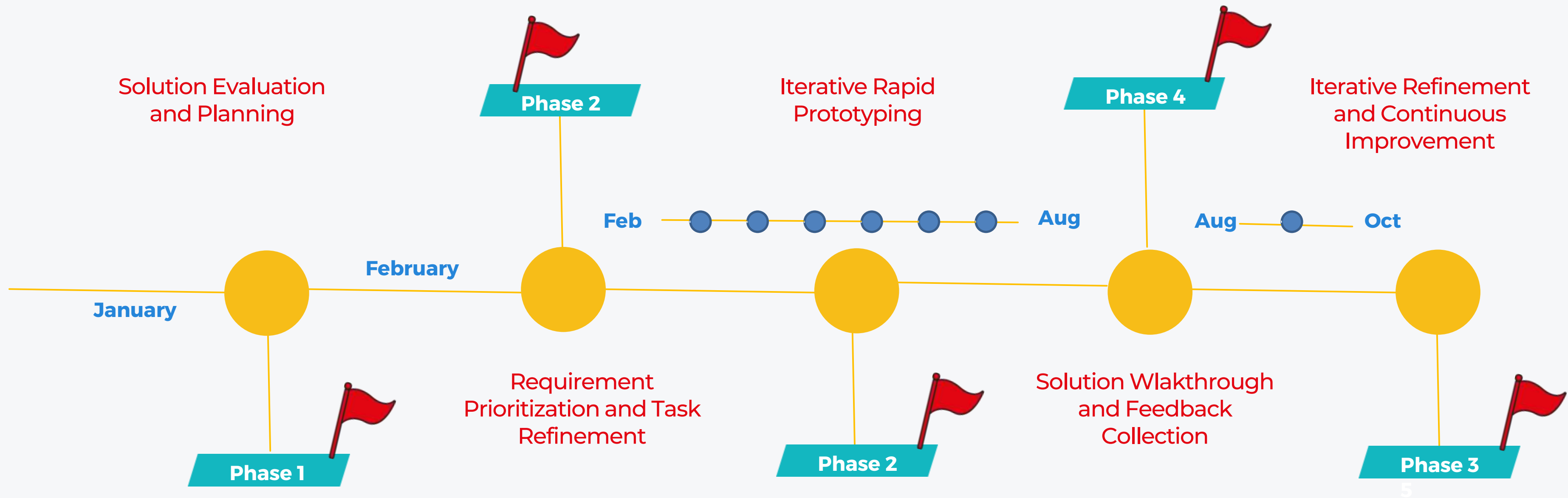- Reporting & Data Analytics

ICM Capability Blueprint

- 2.1 Specify Operational Guidelines
- 2.2 Develop and Adapt Incentive Plans
- 2.3 Administer Technical Adjustments to Incentives
- 2.4 Convey Compensation Strategies
- 2.5 Inform on Targets and Quotas
- 2.6 Manage Rewards and Competitions

- 4.1 Oversee Business Unit Account Data
- 4.2 Administer Product Solution Data Integrity
- 4.3 Define and Manage Territory Specifications
- 4.4 Coordinate Compensation User Groups
- 4.5 Manage Data Segmentation and Classification

- 6.1 Supervise Data Inquiries
- 6.2 Handle and Settle Disputes
- 6.3 Execute Incentive Plan Adjustments
- 6.4 Access to Self-Service Resources
- 6.5 Access to Mobile Resources

- 8.1 Performance Metrics Reports
- 8.2 Operational Activities Reports
- 8.3 Managerial Review Reports
- 8.4 Transmit Data to Subsequent Systems
- 8.5 Provide On-Demand Reporting
- 8.6 Create Visual Displays
- 8.7 Offer Data Insights and Analytics

1 — APPROACH & ACTION
2 — PLANNING & EXECUTION
3 — PARTICIPANT MANAGEMENT
4 — DATA GOVERNANCE
5 — COMPENSATION PROCESSING
6 — COMPENSATION ADMINISTRATION
7 — PAY PROCESS ADMINISTRATION
8 — ANALYTICS & REPORT GENERATION
9 — SUPPORT & ENABLEMENT

- 1.1 Define Goals
- 1.2 Position and Oversee Offerings
- 1.3 Map Distribution and Handle Capacity
- 1.4 Strategize Incentive Plans
- 1.5 Outline Incentive Plans
- 1.6 Allocate Annual Targets and Quotas
- 1.7 Set Payout Budget

- 3.1 Manage Profiles
- 3.2 Manage Relationships
- 3.3 Oversee Targets and Quotas
- 3.4 Ensure Eligibility and Compliance

- 5.1 Consolidate Relevant Transactional Data
- 5.2 Adjust and Validate Performance Data
- 5.3 Allocate Revenue and Actual Figures
- 5.4 Compute Performance Metrics
- 5.5 Administer Awards and Competitions

- 7.1 Oversee Payment Residues
- 7.2 Execute Transactions
- 7.3 Record Incentives in General Ledger
- 7.4 Ensure Audit Readiness

- 9.1 Cultivate Stakeholder Connections
- 9.2 Govern Operational Team
- 9.3 Administer Business Workflow
- 9.4 Comply with Audit Standards
- 9.5 Organize Operational Schedule
- 9.6 Create & Support Solutions

UNDERSTANDING MANAGED SERVICES

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Workforce Transformation

Managed Services is a strategic approach that aims to reduce the cost of ownership by adopting an outcome-based billing model. The primary objective of managed services is to provide comprehensive end-to-end support, backed by SLAs, while targeting YoY improvements for cost savings.

OPERATIONAL SUPPORT THROUGH MANAGED SERVICES:

- Flexibility to focus on strategic goals
- Delegation of day-to-day operational activities to the service provider
- Project Management support provided by the service provider
- Center of Excellence (CoE) for managing reporting, improvements, documentation, and knowledge management
- Resource management, including capacity management, handled by the service provider

Managed Services vs. Vendor Resources: Understanding the Key Differences

	Managed Services	Vendor Model
SLA Driven	Outcome-based with Key SLAs in place	Traditional T&E model with shared outcome
Resource Pool	Access to a shared pool of resources with different backgrounds	Named resource with 1 or 2 areas of expertise
Cost Reduction	Provides cost reduction over time by process improvements	Fixed cost based work on a daily or monthly basis
Re-training	Vendor re-trains when a new resource joins, including backups	MS re-trains when a new resource on boards
Retain IP	IP is retained due to backups and documentation	IP is lost once the vendor leaves
Project Management	Project Management & CoE is the part of overall Model	**Project Management is done by the customer**

HOW WE CAN HELP YOU

SALESDRIVE TECHNOLOGIES

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Sourcing and retaining teams significant upfront capital

Support tasks with existing team hampers growth and productivity.

Training investments take away focus from business growth

Constant attrition affects overall business health

- Tailored Plans to Meet Your Business Needs Expert and Certified

- Resources for Comprehensive Support A Diverse Team Ensuring

- Predefined Service Agreements are Met Dedicated Onshore Customer

- Success Manager for Personalized Assistance Empowering Your

- Internal Teams to Focus on Strategic Engagements Efficient Request

- Management with Continuous Improvement and Proactive Approach

- Flexibility to True-Up Unused Hours Every Quarter Flexible Annual

- Agreements to Accommodate Changing Requirements Regular

- Weekly Status Reports and Updates for Transparency Insightful

- Quarterly Business Reviews for Progress Evaluation