

How **ZINKT** made a complex transition, simple

simPRO turned to ZINKT to harness the combined power of Salesforce and Xactly Incent for visibility and control of a complex web of revenue data.

simPRO is an industry leader in cloud-based job management software. Over 150,000 users in more than 5,500 companies worldwide trust simPRO with their business operations, from in-field estimating and quoting to back-office invoicing and payments – and everything in between.

When it came time to upgrade their incentive system from Xactly Express to Xactly Incent, it was also an opportunity to automate and streamline many of simPRO's manual upstream processes and help prepare the company for its continued global expansion. And there wasn't any room for error or delays.

"We wanted to replace a lot of the manual work that was being carried out on spreadsheets."

**- Madeleine Coutanceau,
Senior Systems and Salesforce
Administrator**

simPRO



“At the same time, we wanted to automate several complex upstream revenue processes that were being handled manually.”

ZINKT simplifies the complex.

simPRO is growing and so are the complexities surrounding how they calculate and manage their commissions.

“We challenged ZINKT to fully automate our highly complicated, manual process, and automate our highly complicated claw back process: a process that needed to look at sales, invoice, payment and incentive data over a long period of time.” said Madeleine.

The simPRO team wanted a software solution that could deal with account cancellations, changing orders, and customer missed payments. They wanted a layer in Salesforce that could easily show any data differences from the time a service was sold and how that data may have changed over time, to process accurate commission payments.

“We needed something that sat in Salesforce that helped us control and manage the complexities of our data and our plans, and that’s where ZINKT came in.”

“As a Salesforce administrator, having ZINKT in Salesforce is kind of a dream.”



ZINKT proved to be a game changer.

It was of critical importance to simPRO that the sales and commission data was available inside of Salesforce and this was the one of the primary reasons they chose ZINKT. As Madeleine explains it: **“The fact that ZINKT actually sits on the Salesforce platform, brings all the information you need into one record, then pushes it across to Xactly Incent, and then pulls it straight back into Salesforce, so the entire sales team can see everything in one place – that is simply awesome!”**

Just as importantly, with ZINKT connecting seamlessly between Salesforce and Xactly Incent, the simPRO team was able to have commission records separate from their sales records and then use that data to manage claw backs, cancellations, or any other anomalies that could lead to an incorrect commission payment. ZINKT gave simPRO a platform to audit and control queries, managing any disputes that may be raised by sales, all within Salesforce.

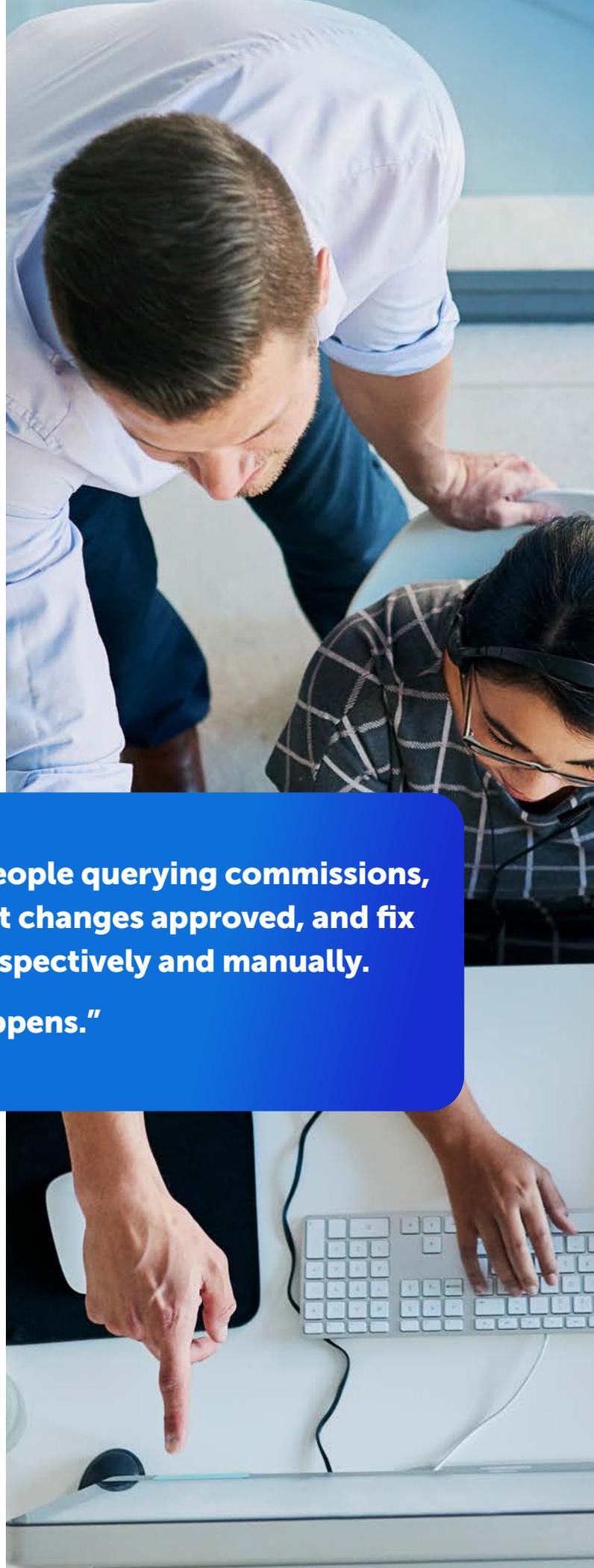
“With ZINKT, the amount of manual work for processing claw backs has gone from a half day’s work to zero, because ZINKT does it all automatically in a few clicks – which is fantastic!”



Having ZINKT functionality available in Salesforce has proven to be a gamechanger for many companies. ZINKT leverages all the functionality and flexibility of Salesforce while adding new layers of data analytics and control over your revenue operations. By functioning inside of Salesforce, ZINKT users can use Salesforce functionality they are familiar with, like process builder, workflows, approvals, email alerts, views, reporting, and dashboards. Everything you can do on the Salesforce platform you can also do with ZINKT, including working with records. The result: payment and attainment information pulled from Xactly Incent.

“In the past, we would have people querying commissions, and then we would have to get changes approved, and fix a lot of the commissions retrospectively and manually. Now? That basically never happens.”

As Madeleine describes it: **“You’ve got the power of ZINKT on the Salesforce platform, which essentially allows you to create your commission records and enforce your revenue governance. It then pushes your clean data to Xactly Incent, which does all that powerful processing and validation of the commission plan calculations!”**



Making a measurable impact.

The ZINKT implementation has had a notable impact on simPRO business operations.



There was over a 50% reduction in administration time and, more importantly, the sales team saved time by having all the information they needed right there in Salesforce. Because ZINKT functions inside of Salesforce, the sales and admin teams are already working in a familiar environment. With new, powerful tools, they now have greater clarity and better control over the revenue journey, from sales to commissions paid.



Just as importantly, ZINKT allowed simPRO's compensation team to move away from spreadsheets and manual processes and shift to a centralized workflow, with greater reliability and data accuracy. This has had the effect of not only reducing the risk and danger of errors and miscalculations, but it gives the management team greater confidence in the reliability of their data and provides traceable records and an audit trail.

ZINKT is the perfect solution for the complexities of modern business.

"I would recommend ZINKT to any organization that wants their sales reps working in Salesforce more and that wants greater visibility into the sales and commission processes." Madeleine concludes. **"If you want the functionality of Xactly Incent and the power and familiarity of Salesforce, then ZINKT is your solution!"**

Reach out today. inquiry@zinkt.com