

# Creating a Quote-to-Cash Orchestration at Xactly

Xactly unifies business applications with SnapLogic's self-service integration platform

## The Xactly Backstory

Founded in 2005, Xactly helps organizations unleash human potential in their employees through incentive compensation. Xactly offers a cloud-based, incentive management solutions for organizations to empower their employees to become top performers and drive business growth.

### Company Overview

**Headquarters:** San Jose, CA

**Industry:** Software

**Employees:** 350-500

**Annual Revenue:** \$17.8 million

### Challenges

- Connect a number of business applications to eliminate data silos
- Improve decision-making effectiveness to boost customer experience

### Results

- ✓ SnapLogic connected Salesforce, Workday, NetSuite, and other applications to create a single system that delivers a complete view of the customer lifecycle

### Benefits

- ✓ Provided a seamless view of customer data across all departments
- ✓ Increased employee and team productivity
- ✓ Prioritized and delivered great customer satisfaction

### Applications Integrated

Domo - NetSuite OpenAir -  
Salesforce - Workday

## The Challenge

Over the past decade, Xactly has grown into a mature software company and looked to modernize the company's IT systems and infrastructure. The company turned to new applications to enable different departments within the organization to stay agile and achieve business results. As a result, the company prioritized its "cloud first" approach by implementing cloud solutions in their IT architecture.

The IT team at Xactly deployed multiple cloud applications, including Salesforce for their marketing and sales' customer relationship management system, Workday for their finance and human resources teams, Domo for their business intelligence team, and NetSuite OpenAir for their professional services team, among other cloud applications. As the number of applications increased, teams faced silos of information, disabling them from moving quickly and providing the best possible customer experience.

These applications proved to be useful for teams to manage their workflows within their departments. Over time, the organization realized that the same applications they implemented to stay nimble actually hindered them from identifying issues and making data-driven decisions. Teams saw gaps in their customer information, resulting in disconnected business insights.

One of the biggest issues Xactly faced is that prospective customer and existing customer data in Salesforce was not connected to contract and billing information within Workday or the professional services projects in NetSuite OpenAir. The missing customer information disabled individual departments from identifying customers that required customer support. Users conducted repetitive and manual data entry to merge customer data and attempted to create a single view of the customer - wasting valuable employee time and resources.

## The Solution

With a vision to create a single system of systems, Xactly Senior Director of IT, Bob Genchi, turned to the SnapLogic Enterprise Integration Cloud, an integration platform-as-a-service (iPaaS) that would help them create a hub-and-spoke model, allowing applications to work together seamlessly. The SnapLogic iPaaS would serve as the foundation used to automate integrations among business applications and corporate data sources and systems.

Xactly's initial project was to deploy SnapLogic's pre-defined intelligent connectors, called Snaps. SnapLogic Snaps are modular collections of integration components built for a specific application or data source. SnapLogic Snaps replaced hand-coded integrations and enabled users to assemble data integration flows using a drag-and-drop interface. Using Snaps, Xactly integrated and automated a quote-to-cash orchestration drawing sales data from Salesforce CRM, professional services billing information from NetSuite OpenAir, and contract information from Workday Financial Management in fewer than two weeks.

Xactly plans to expand their SnapLogic integration work with other applications including ADP, Zendesk, EASi, Apttivo, and more.

## Business Outcomes

The SnapLogic Enterprise Integration Cloud and a selection of Snaps enabled Xactly to integrate disparate business applications, creating a unified system that more effectively managed the entire customer lifecycle. Now, technical and business users within Xactly can input or access the information needed to provide outstanding customer service.

Integrations and new business templates completely automated formerly time-consuming manual data entry and freed resources to focus on more business-critical projects. Because it had access to all business and

Xactly

“SnapLogic enables us to connect our applications in real-time in order to create a single, comprehensive, system of systems to run our expanding incentive compensation business.”

Bob Genchi  
Senior Director of IT, Xactly

customer data, Xactly was better equipped to assess the current state of the business and create strategic business plans.

Even with these tremendous benefits from connecting data and applications, Genchi comments that the company's “executive team is particularly thrilled with the access to a complete view of customer data and the competitive advantage we gain from providing top-notch customer service.”