SAP® Sales Planning and Performance Management

Deliver next-level operational efficiency to keep agents motivated and focused on selling
Anyone involved in selling financial services products knows that understanding and managing complexity is part of the job. Not only can the products themselves be highly complicated but managing the back-office sales operations to support these products over time can be just as complex. Licensing, Commissions management, navigating a constantly changing web of regulatory requirements at both the state and federal level. Each of these operational issues must be managed effectively so that sales agents remain motivated and focused on selling, and the organization itself remains compliant while hitting sales targets quarter after quarter.

And yet today, many financial services firms are managing these business-critical issues with a patchwork of outdated, homegrown tools that are struggling to keep up with all this complexity, requiring more time and care to run than most would like to admit, and diverting their focus from what matters most: selling.

**Experience matters**

At Deloitte, we’ve spent decades helping financial services organizations of all sizes reign in the complexity of their sales back office to deliver results. We’ve used that experience to apply the power of SAP’s advanced, enterprise-class sales solutions—SAP Agent Performance Management and SAP Commissions—in a potent, targeted, practical manner, with a focus on seller experience, managing compliance and performance management for financial services. Here’s a closer look.
While our approach to SAP-enabled Agent Performance Management addresses virtually every aspect of the sales organization, there are three key aspects that financial services firms turn to Deloitte for help most frequently.

Professional licensing management, tracking, and compliance

We help clients rein in the complexity of professional licensing across federal, state, and even county-level jurisdictions, helping keep track of which licenses are current, which are set to expire, and ensuring that all related administrative documents remain compliant.

Commissions and incentives management

Making sure that sales professionals are paid accurately and on time is a baseline requirement for high-functioning sales organizations—and it is also more difficult than ever in financial services. Our approach keeps commissions and incentives management running smoothly no matter how large or complex the sales organization may be—and goes a step further to help sales teams anticipate and respond to issues such as churn, overpayments, overcrediting, and more.

Evolving Go To Market Model

New go-to-market models such as team selling, deploying multiple sellers in different roles, and commission allocations, add to the complexity of administering commissions—especially since legacy commission systems were never designed to support these new arrangements. Using SAP tools, we help sales organizations support flexible agent and distributor agreements that follow proven processes to ensure accuracy and compliance.

A tangible, measurable impact on performance and ROI
With Deloitte’s help tailoring SAP Agent Performance Management and SAP Commissions to their specific needs, our clients achieve a host of critical benefits, including:

- Consistent accuracy in commissions payments
- Superior, differentiated experiences for sales professionals
- Ability to quickly design and launch new selling agreements
- Modernized and automated administration that can reduce operational costs
- Significantly less time spent on administration to focus on commission optimization
- Dashboards and gamification that help foster a performance culture and unlock untapped revenue potential
- World class change management and user adoption capabilities to help ensure critical benefits are realized.

SAP Commissions is flexible, too. It comes already integrated with SAP ERP and SAP® SuccessFactors®—and we have helped many clients integrate it with other order management, billing, HR, payroll and other accounting/ERP systems.

In Deloitte’s hands, SAP commission solutions becomes an even more potent tool for companies deploying various sales models, enabling them to drive growth and competitive differentiation.

Accelerators for making a bigger impact

Building on our deep experience in financial services, we have developed a range of technology and business process accelerators that deliver more value and consistent quality across the sales organization.

Sample accelerators include:

- **Planning phase accelerators:** Business case frameworks, process improvement metrics, estimation tools, and more.
- **Design/build accelerators:** Prebuilt integration with all leading HCM, Payroll and Financial solutions.
- **Testing through deployment accelerators:** Automated testing tools configured to work with SAP, plus prebuilt cutover plans to make sure every detail is covered.
Let’s talk

Deloitte has worked with many of the leading sales organizations in financial services to put the power of SAP to work in support of their goals. We know the industry and are recognized throughout the world for our deep collaboration with SAP. When financial services sales organizations need to reduce the complexity of some of their most persistent operational challenges to generate real, measurable results quickly, they can count on Deloitte and SAP together.

Every successful initiative starts with a conversation, and we would love to hear about your organization's unique challenges. Start by reaching out to us using the contact information below.

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