

CI Investments Improves Sales Forecasting Accuracy and Retains Top Talent With Xactly's Intelligent Revenue Platform



ABOUT CI GLOBAL ASSET MANAGEMENT

CI Global Asset Management is one of Canada's largest investment fund companies. Over the years, CI expanded its lineup to provide investors with an increasingly comprehensive offering of Canadian, global, and industry funds.

THE BACKGROUND

The team at CI Investments has leveraged Xactly to help increase business resiliency, attract top talent, and enhance their ability to make intelligent, data-informed choices around revenue while they grow.

The company is currently accelerating operations across its divisions. With this expansion, they are focusing on enhancing workflows. Optimizing digital workflows is a goal that 84% of firms say is more important than ever coming out of the pandemic. As part of this transformation, the company has integrated Xactly across its production and revenue streams to improve agility and support team members across the organization to better reach organizational goals.

“For organizations that want to grow and thrive in changing markets, it's critical to see exactly how much revenue a specific client is generating, and how much compensation a salesperson received to bring in that revenue. Xactly gives us the agility we need to manage our revenue intelligently.” - Ahmad Salehzadeh, VP, Sales Operations, CI Investments

HOW XACTLY IS SUPPORTING CI

The Sales Operations team at CI is utilizing Xactly's data and revenue intelligence solutions to align the team's production and revenue streams. Since 2019, Xactly has enabled the team to use their data more strategically.

They are using their data to:

- ▶ Assess results daily in order to remain agile and make impactful changes to sales plans when necessary.
- ▶ Deliver increased clarity to both sales team members and executive stakeholders.
- ▶ Reverse-engineer workflows from forecasts to achieve key objectives.

As Ahmad Salehzadeh, VP, Sales Operations, CI Investments said, **“Our revenue predictability and forecasting accuracy has improved tremendously since using Xactly. We can now look at trend lines, historical data, and easily forecast revenue. Finance expects accuracy and predictability in the forecast, and we can precisely assure results.”**

Using Xactly data and reporting, CI Investments can accurately assess the effectiveness of performance-related variable compensation. The result is that they can make sales decisions with significantly higher precision and reliable outputs for the company. Building a business, and especially a sales organization, that's resilient enough to withstand internal and external change is critical.

With Xactly's support, Salehzadeh's team has been able to better understand the reliability of the company's revenue streams, instilling a level of certainty that his

team is able to reverse engineer desired outcomes. Beyond forecasting performance, Salehzadeh credits Xactly in enabling a company culture rooted in transparency, credibility, and trust – helping to energize sales teams and attract talent from across the industry. Salehzadeh added, **“We think that using Xactly gives us a competitive advantage in retaining top performers. Investors are impressed with the way that we are investing in digital transformation.”**

CI INVESTMENT'S RESULTS

- ▶ Xactly has powered a 10% reduction in errors. These errors would have cost tens of thousands if left unidentified.
- ▶ Forecasts have seen a 20 percent improvement in accuracy. This has led to a comprehensive understanding of compensation structures.
- ▶ Increased trust, transparency, and collaboration between Finance and Sales departments.
- ▶ Enhanced their reputation and brand to attract and retain top performers.

Armed with up-to-date insights Ahmad Salehzadeh and his team have stronger confidence in building and sharing forecasts across the company to inform near and long-term plans, and ensure continuous progress towards sales and company goals.

ABOUT XACTLY

Xactly has helped thousands of companies and millions of sellers around the world beat their revenue targets. Using Xactly's solutions, leaders look past the current quarter to create revenue streams for long-term growth. The Xactly Intelligent Revenue Platform marries artificial intelligence and 17 years of proprietary data in easy-to-use applications. Sentiment, process, and trend analysis come together to form accurate machine forecasts. Quick identification and implementation of revenue plans, quotas, and territory improvements are easy. And, rapid calculation of even the most complex compensation plans keeps sales reps motivated and on track.

This makes the Xactly Intelligent Revenue Platform the only solution that aligns seller behavior with boardroom strategy to create a resilient, predictable, and profitable business. To learn more about Xactly and the latest issues and trends in intelligent revenue, follow us on Twitter, Facebook, and visit <https://www.xactlycorp.com>.

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