

CUSTOMER SUCCESS STORY

How Obero SPM helped CAA streamline
compensation management processes





Company:

CAA (Canadian Automobile Association)

Location:

Markham, ON

Website:

www.caa.ca

Industry:

Auto Club | Insurance

The Canadian Automobile Association (CAA) is one of the largest consumer-based organizations in Canada. Providing freedom and peace of mind to 6 million Members through 9 automobile Clubs and 140 offices located across the country.

CAA provides access to an impressive and ever-expanding range of innovative and reliable services that allow the customer to travel with confidence.

The CAA Club offers exceptional Emergency Roadside Service, complete Automotive and Travel Services, Member Savings and comprehensive Insurance Services.

Data Sources



“ Obero SPM helped us reduce monthly commission calculation from days to only 15 seconds. ”

Ajay Tellis, CFO, CAA

PRIOR TO IMPLEMENTING OBERO SPM

CAA managed incentive compensation utilizing manual processes with several systems.

1. Exported sales data from the Point-of-Sale (POS) System to Excel
2. Manually reconciled data to ensure that POS System matched booked sales
3. Sent data to a third party vendor for compensation calculations
4. Used 3 internal full time Finance Associates who would manually check the validity of the data from third party vendors
5. Finance Associates created commission reports in Excel to share with district managers, sales managers and sales associates via email

CHALLENGES

- Complex compensation plan that included multiple tiered, union, non-union plans and payouts on various metrics
- Excel calculations were error prone and led to overpayment of commissions
- Third party vendor used batch processing and data was not in real time
- Manual reconciliation process (prone to errors)
- Data fragmentation (no source of truth)
- Lack of reporting capabilities for reps/managers/admin personnel
- Manual reporting processes
- No workflow/auditing

OPTIONS

Excel

- Inflexible reporting
- Unable to automate compensation calculations
- No audit trail or visibility across departments

ICM Vendors

- Met automation and reporting needs, however, was not able to handle complex compensation structure
- Could not provide adequate and flexible sales planning and forecasting solution
- Extremely expensive to implement

RESULTS

CAA turned to Obero SPM to automate incentive compensation calculations and provide a platform that allows planning, creating and distributing compensation plans. The objective was to centralize sales and compensation management in one solution that integrates seamlessly with current systems.

- Obero SPM was able to handle complex compensation structure that includes multiple tiered, non-tiered plans and payouts on multiple metrics.
- Capable of easily creating, modifying and assigning compensation plans by scenario which allowed for compensation planning/forecasting
- Able to handle multiple data sources from HRIS, GL, and POS for source data required to calculate compensation. Data load processes were automated and on-demand
- Processing evolved from batch to real-time
- Significantly decreased number of commission errors and sales representative complaints
- Reduced calculation time from days to 15 seconds
- Gained real time reporting and transparency into compensation, attainment tracking, and quota management for sales representatives, managers and executives
- 3 full time Finance Associates who use to manually calculate incentives are now able to focus on more value added activities

“Eliminated approximately \$15,000 monthly cost of calculating incentives”

Ajay Tellis, CFO, CAA

WHY CAA CHOSE OBERO SPM

- Trusted Obero with regards to ability to deliver due to understanding of the CAA union and non-union retail environment
- Nimble and experienced team of consultants
- Obero SPM was selected over other ICM vendors due to functionality, ease of use, and total cost of ownership
- Scalability: Plans to expand Obero SPM to Insurance and Membership departments

ABOUT OBERO SPM

Obero SPM is an innovative software solution developed by Obero, a global leader in providing Performance Management solutions to clients spanning across multiple industries. Obero SPM helps organizations streamline their Sales Planning, Execution and optimization processes by providing the required tools to effectively manage sales performance. Its comprehensive functionality, which includes Sales and Revenue Management, Territory and Quota Management, Workforce Management, Incentive Compensation Management and Profitability Management, provides organizations with a solution that supports the end to end sales performance life cycle; automating processes for the Offices of Sales, HR and Finance. Obero has been ranked in the top 20 Most Promising Corporate Finance Tech Solution Providers by CIO Review and is recognized as Momentum Company of the Year by Techconnex, also topping the Branham 300 Canada's Top Technology Companies in 2014 and 2015 listing.

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