

CASE STUDY

BenefitMall Modernizes Their Commissions Program with CaptivateIQ



“With CaptivateIQ we are able to accomplish all commission-related tasks we need to do on a routine basis in significantly less time than before with Callidus. This frees us up to modify and adjust commission plans to keep up with the company goals.”



Chelsie C.
Senior Financial Analyst, BenefitMall

After years of painstaking commission cycles, **BenefitMall's finance team ditched SAP's inflexible and inefficient Callidus software for CaptivateIQ's flexible and fully automated commission solution.** With CaptivateIQ, the BenefitMall team saves time, reduces calculation errors, and fosters a closer relationship with the sales team.



The Hero

BenefitMall offers best-in-class broker benefits services by leveraging technology and human expertise. With a combined nationwide network of over 20,000 brokers, BenefitMall works with brokers and carriers to deliver efficient and secure digital benefit solutions.



Chelsie C., a Senior Financial Analyst at BenefitMall, is responsible for managing the entire commissions process from end-to-end. Chelsie focuses on sales incentive compensation, plan building, modeling, budgeting, and monthly commissions.

The Challenge

An Outdated Solution & Inefficient Process

BenefitMall has a long history of innovation and growth, with multiple acquisitions throughout the company's 40-year history. However, as the company has continued to scale more recently, the commissions process struggled under the burden of SAP Callidus, an outdated, inflexible and inefficient solution.

“With Callidus, we were struggling with a lack of speed when processing commissions, lack of customization with our plans, and a burdensome process for modifying plans or adding new employees.”



Chelsie C.
Senior Financial Analyst, BenefitMall



After BenefitMall launched a new cloud-based platform called Agency Workspace, Chelsie and the BenefitMall finance team began exploring new options for managing commissions to keep up with the increased product offerings and growing sales team.

“We realized that Callidus's limitations were preventing us from creating the agile and flexible compensation plans we needed for our growing sales organization. We were also losing countless hours to collecting, processing, and calculating commissions every month.”

The Solution

A Fully Automated Commission Platform

After months of research and implementing new sales plans, Chelsie and the team found the ideal solution that solves their needs for a flexible, automated, and transparent solution in CaptivateIQ.

“CaptivateIQ has the most user-friendly experience out of all the commission software solutions we reviewed. It is intuitive, transparent, and easy to use.”

By partnering with CaptivateIQ, Chelsie and the BenefitMall finance team were empowered with:

- **Flexible commission plans**, with the ability to modify and add new payees with ease.
- **Fully automated processes with streamlined calculations**, processing, and collection of monthly commission.
- **Transparent, customizable commission statements** for their hundreds of sales reps.
- **Scalable and streamlined commission operations**, with a robust platform and engine.

“With CaptivateIQ, we are able to accomplish all commission-related tasks we need to do on a routine basis in significantly less time than before with Callidus. This frees us up to modify and adjust commission plans to keep up with company goals.”

The CaptivateIQ platform includes all the features the BenefitMall team needs to manage commission calculations on a monthly basis.

Melissa Williams

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12/31/23

Enterprise Account Executive

New inquiry

Approve payout

Statement Details

YTD Attainment | FY2023

\$1.0M

\$0.8M

Annual Quota

Pending

\$14,981.25

Gross Payouts

Welcome, Melissa

Payout Overview	December 2023
\$150,167.87	\$14,981.25

\$997,995.34

Total Payout by Commission Plan

Favorite CaptivateIQ feature:
Statement Customization Options

The Results

Time Savings, Increased Accuracy, Greater Transparency

300+

Reps have trust in commissions

60 Hours

Per month saved on commissions calculations & processing

20%

Reduction in commission calculation errors

With CaptivateIQ, the finance team at BenefitMall has a more intuitive and transparent solution for managing commissions operations.

“ If anyone is looking for a solution to manage and administer their sales incentive compensation, I highly recommend CaptivateIQ.”

Ready to modernize your incentive program?

CaptivateIQ can help you set up plans quickly, save huge chunks of time, and better align your sales team with their objectives.

Request a demo today