How Super Claims Assist Increased Efficiency and Transparency in Commission Management
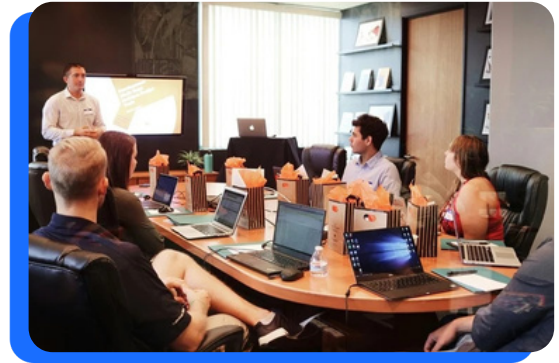
< 7 days	**30+**	**20+**
Lighting-fast implementation period	Sales Reps	Days saved during every payout cycle

> Sales commissions at Super Claims Assist involved a multi-step process requiring collaboration with external partner firms and complex commission adjustment policies. It was a challenge to manage the entire process on spreadsheets.

About Super Claims Assist

HQ: Brisbane, Australia

Sales Representatives: 30+

Industry: Insurance

CRM: HubSpot

Super Claims Assist is an Australian firm dedicated to assisting individuals who cannot work due to health issues in finding and claiming their total and permanent disability (TPD) insurance lump sums. By guiding customers through the complex claims process, Super Claims Assist empowers them to secure the financial support they need during challenging times.

The Challenge: Complex Incentives, Event Bonus and Unpredictable Adjustments

Sales commission management at Super Claims involved an external approver which was a dynamic component of their sales process. It was difficult to predict the number of adjustments for individual sales reps. This led to a lot of to-and-fro communication between the RevOps team and sales reps which was time consuming for both the teams. All of this was tracked using spreadsheets which made it even more difficult and ran the risk of errors.

1. Paying acquisition bonuses before claim verification: Super Claims Assist pays its sales reps a fixed amount for each new client claim file sent to partner law firms. However, these law firms take 1-3 months to verify if the sale was a valid claim or not.

2. Clawing back bonuses for unsuccessful claims: If a claim is ultimately rejected by the law firm after the initial payout, Super Claims Assist needed a way to credit/adjust or clawback that bonus amount from the rep's future earnings.

3. Capping clawback amounts: To ensure reps could still earn commission, Super Claims Assist required the ability to cap the clawback amount at 50% of the rep's current monthly commission.

4. Lack of pipeline visibility: Without a centralized system, reps lacked visibility into their expected earnings based on the claims pipeline and potential clawbacks.

5. Event-based Bonus: The company also provides bonuses to employees for specific events such as getting a Google review from customers. Since this was event based, they had to manually track and remember to payout these bonuses on time.

The existing spreadsheet-based processes made accurately tracking and calculating these unique bonus, clawback and capping rules extremely challenging and error-prone.

The Solution: A Flexible Commission Automation Platform

Super Claims Assist implemented Visdum's no-code sales commission automation platform to seamlessly model and manage their multi-step commission structure, event-based bonuses and clawback process. Visdum's advanced crediting and capping features with individual sales rep dashboard enabled Super Claims Assist to bring efficiency and transparency to this complex computation.

Why did Super Claims Assist choose Visdum?

After evaluating multiple vendors, Super Claims Assist selected Visdum based on a successful proof-of-concept that accurately modeled their unique incentive structure within a week. Visdum's ability to give Super Claims' reps real-time visibility into the entire process made it a clear choice. They found that our platform was easily able to handle their advanced commission process, event-based bonus, adjustment rules, and capping.

Impact: Empowering Reps and Unlocking Efficient Compensation Management

By automating sales compensation with Visdum, Super Claims Assist has been able to streamline payouts while providing sales reps with unprecedented transparency. Further, the approval workflows in the platform helps the entire sales team and the RevOps team save countless hours that would otherwise be spent on back and forth communication.

- Accurate multi-step bonuses: Visdum could replicate Super Claims Assist's process of paying commissions when a claim is first submitted, then applying adjustments for non-eligible sales after 1-3 months.

- Capped clawback amounts: With a simple configuration during the setup process, Visdum was easily able to automatically cap monthly adjustments at 50% of total commission earnings of the current month as per company policy.

- Real-time pipeline visibility: Through individual dashboards, reps can now view their projected monthly earnings based on the claims pipeline, credited amounts and applicable adjustments/clawbacks.

- Sales Leaderboard: Visdum's sales leaderboard is another standout feature that Super Claims is now leverages as a great motivation tool for their sales team. These leaderboards instil a sense of healthy competition and keep reps striving to achieve more.

- New incentives for top reps: With an automated core commission process, Super Claims Assist can now layer on additional incentives like bonuses for positive reviews to motivate top performers further.

By partnering with Visdum, Super Claims Assist has been able to bring transparency, speed and flexibility to its complex commission process - fostering a motivated sales force with clear line of sight to their earnings.

You've seen how we solve tricky operational headaches, want to see what we can do for you? Let's talk.