

The logo for OpenSymmetry, featuring the word "opensymmetry" in a lowercase, white, sans-serif font. The letter "o" is stylized with a small circle inside it. The background is a dark blue gradient with abstract geometric shapes in shades of green and blue.

OPENSYMMETRY · VARICENT UNLOCK 2026

Building Best-of-Breed SPM Program with the Emerging Role of AI

Presented by OpenSymmetry

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What We'll Cover Today

01

Market Perspective

Where the SPM market is heading and what's driving change.

02

Use Cases for SPM

Benchmarks to apply to your organization.

03

Prerequisites

The foundations to get right before activating advanced capabilities.

04

Roadmap Strategy

How to sequence the journey for momentum and ROI.



State of Sales Compensation Today

+2.7%

YoY growth in sales compensation costs

As plan focus shifts to productivity

20%

believe their plans are effective

97% are actively making changes to plans

~65%

cite the need to improve sales comp governance

Operations and administration efficiency

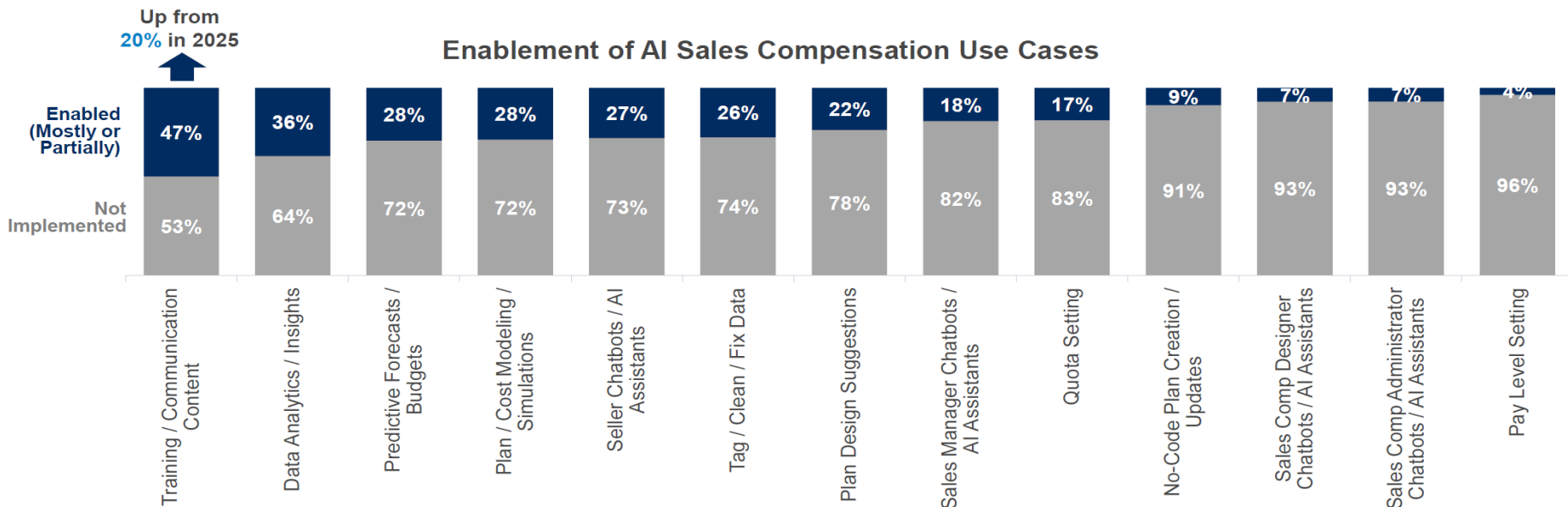
64%

have enabled AI in at least one use case

Using on average 4 AI solutions

AI Sales Compensation Use Cases

64% have enabled AI in one use case, using on average 4 AI solutions. Training / communication content went from least to most enabled (47%) as firms use internal tools to improve practices.

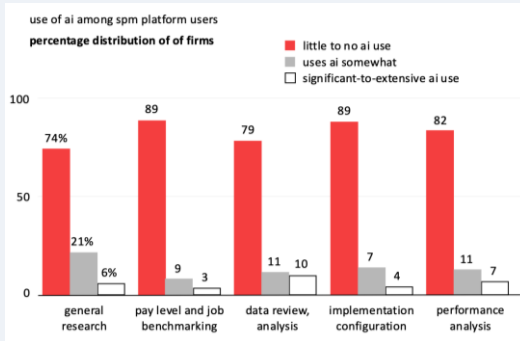


1: Artificial Intelligence (AI) is defined as any techniques or tools that simulate human intelligence in machines to perform tasks. This includes machine learning tools that use large amounts of data to conduct predictive analytics (e.g., prospect health/pro propensity scoring, product recommenders, next best action recommenders) and Generative AI/Agentic tools that can transform or create content such as text and video (e.g., post-call summaries, email drafting, AI-powered chatbots). These tools may exist as standalone applications (e.g., ChatGPT) or be integrated into existing tools (e.g., Salesforce Einstein).

How do we stay ahead without repeating the AI ROI mistakes everyone else is making?

MARKET SIGNAL

AI use in sales comp is lagging



THE RISK

95% of GenAI pilots are failing

MIT research: early pilots didn't translate to measurable business value. Overpromising "autonomous" capabilities + heavy data/governance requirements = a trough most organizations are still in.

THE OPPORTUNITY

The 5% who persist will win

Those who find practical, focused applications — solving integration challenges, building the right teams, managing risk — will emerge strongest.



S E C R E T S O F T H E 5 %

2X

more likely to reach **full deployment**
when AI pilots are **vendor-led vs. built**
in-house

Where does SPM align?

- **Back-office focus:** Projects focused on back-office automation outperform.
- **Strategic partnerships:** Vendor-led AI initiatives reach full deployment far faster than in-house builds.
- **Data discipline:** Clean, structured, governed data is non-negotiable before AI activation.

Sources: MIT GenAI Research | HBR Aug 2025 (John Kron)



SECTION 02



Use cases for SPM



What AI Unlocks When You Operationalize It

OpenSymmetry's implementation approach delivers across three dimensions — speed, quality, and scale

60%

reduction in comp plan change
cycle time

Alexander Group, 2025

50%

reduction in QA cycle time
when AI generates test cases
and scripts

McKinsey, 2025

45%

reduction in operational
admin time when AI agents
assist with handling inquiry,
data tasks, etc..

McKinsey, 2025



Designer Specific Strategies

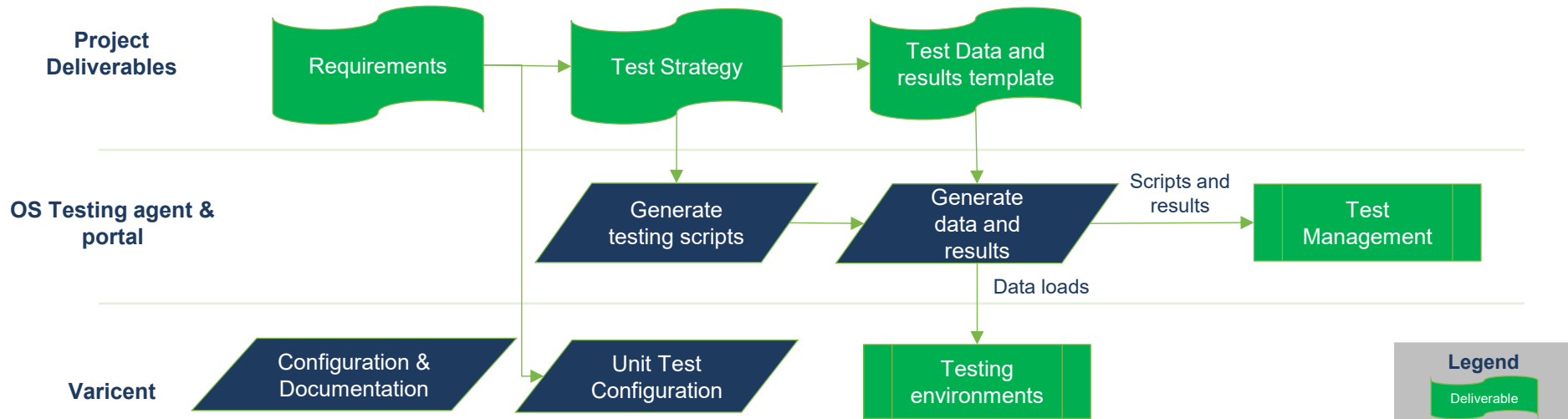
Speed to market for configuration changes and traceability / documentation

Governance	Project Planning, Status & Steering Committee Meetings, Change Management, & Risk Mitigation				
Project Phases	Requirements	Design	Build	Test	Deploy
Typical Outputs	<ul style="list-style-type: none">• SPM Requirements	<ul style="list-style-type: none">• Functional Design	<ul style="list-style-type: none">• Config & Unit Test	<ul style="list-style-type: none">• System & User	<ul style="list-style-type: none">• Production
Configuration	<ul style="list-style-type: none">• Designer assistant loading format to start config	<ul style="list-style-type: none">• Refine prompts with client design details	<ul style="list-style-type: none">• Generate initial configuration with Designer Assistant	<ul style="list-style-type: none">• Automated unit and regression testing verification	<ul style="list-style-type: none">• Calculation Notes and AI summaries serve as migration documentation
Traceability	<ul style="list-style-type: none">• Load requirements into to create traceability	<ul style="list-style-type: none">• Use designer "Notes" as primary in-app documentation	<ul style="list-style-type: none">• Auto-generated unit testing from calculation logic	<ul style="list-style-type: none">• AI issue resolution recommendations surface within test results panel	



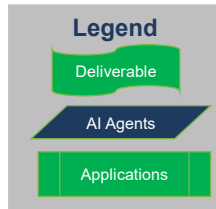
Aligning your Software Development Life Cycle

Increase speed to market, while ensuring quality



Key assumptions:

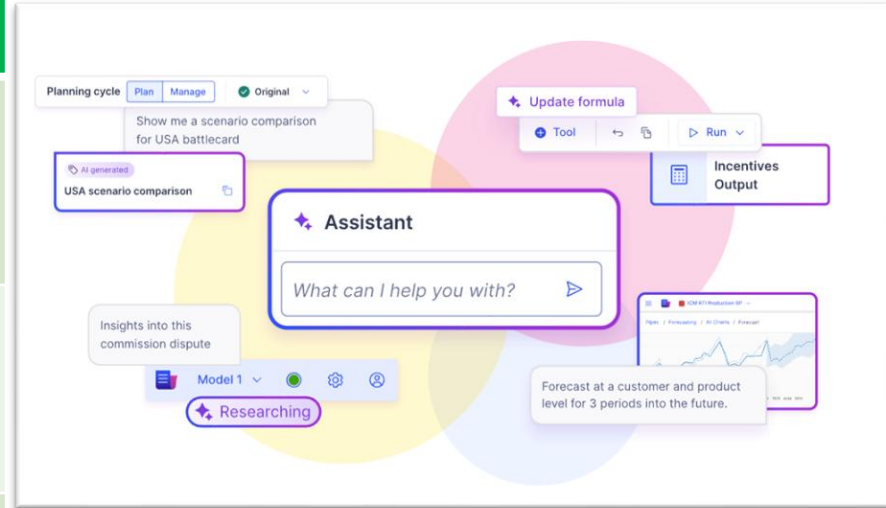
- No client data will be retained by AI models
- Client approve all deliverables and results of AI agents
- Test Management could be done in client system



Lower touch processes are a force multiplier

Processes that will scale with company growth

ICM Process area	AI use case
Inquiry/claims	<ul style="list-style-type: none">Interact with field for Q & A (How far?)Ensure data collection for inquiry from field
Configuration creation	<ul style="list-style-type: none">Create new and update existing feedsValidations and error handlingKnown issue resolution
Reporting and analytics	<ul style="list-style-type: none">Identify anomalies for researchModel growth of sectors or products



SECTION 02

Prerequisites of Best-of-Breed SPM with AI



AI Succeeds When the Foundation Is Solid

Fix the plumbing first. Strategic AI capabilities only unlock when data, process, and governance are clean.

FOUNDATION REQUIREMENTS — These must come first

01 • DATA FOUNDATION

Clean, Connected Data

*Clean data unlocks everything
downstream*

02 • PROCESS INTEGRITY

Reliable, Governed Process

*Deterministic logic AI can trust and act
on*

03 • PLATFORM ADOPTION

Full Platform Utilization

*Operational excellence before strategic
AI*

ONCE THESE ARE SOLID, AI CAPABILITIES UNLOCK

AI Inquiry Agent

Reps self-serve on disputes

Predictive Forecasting

Model plan changes before
launch

Territory Optimisation

Only viable with clean
hierarchy data

AI Plan Design

Requires trusted calc engine



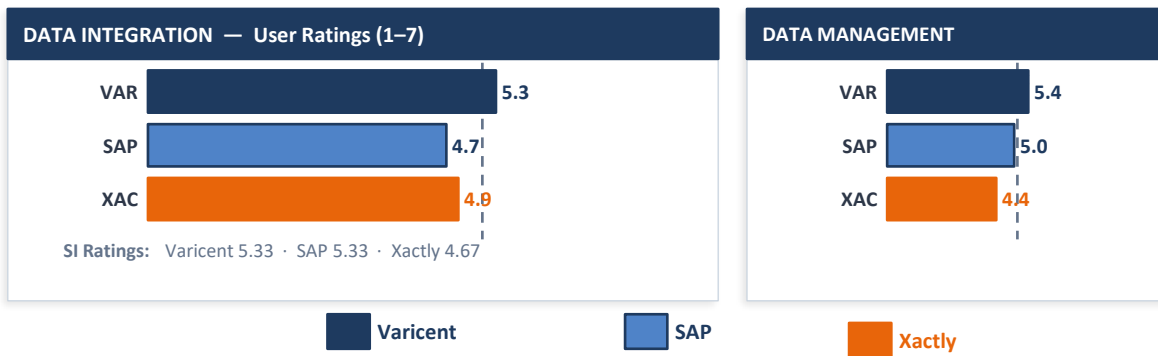
Foundation 01: Clean, Connected Data

“Without a unified data model governing all active comp plans, AI outputs will surface contradictions that erode payee trust faster than any manual process ever did.”

GARTNER, 2025

WHAT CLEAN DATA UNLOCKS

- **AI Inquiry Agent:** auto-resolves disputes because the calculation chain is traceable
- **Predictive Forecasting:** models plan scenarios against reliable historical data
- **Automated crediting:** no manual corrections when source data is validated at intake



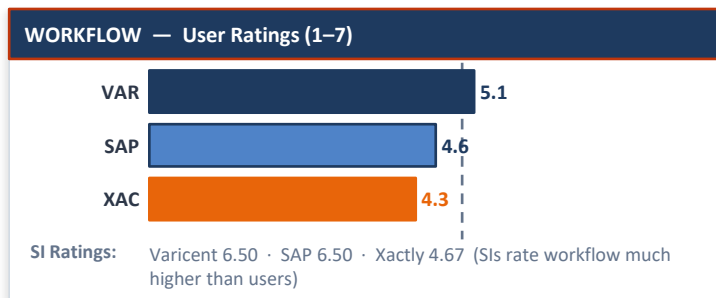
Foundation 02: Reliable, Governed Process

→ “Companies with automated approval workflows close compensation cycles 2x faster and see 40% fewer payment disputes than those relying on manual handoffs and email approvals.”

M c K I N S E Y , 2 0 2 5

WHAT GOVERNED PROCESS UNLOCKS

- AI agents for inquiry: admins must understand the system before they can trust AI to act on it
- Audit-ready approvals: every change tracked with who approved, when, and why
- Cycle time reduction: structured workflows compress plan changes from weeks to days



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SAP

Xactly

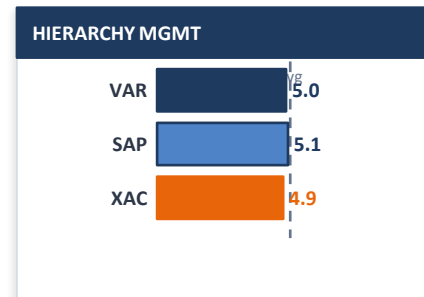
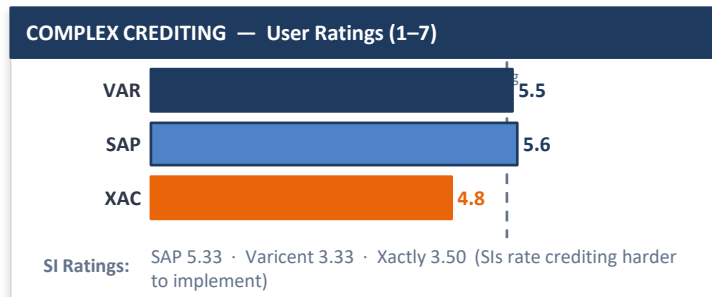
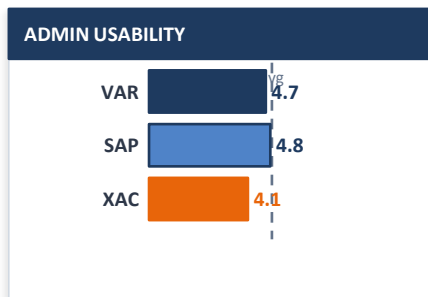


→ *“Platforms where business admins cannot self-serve create a structural IT dependency that blocks AI activation entirely — the capability exists in the software, the adoption simply doesn’t.”*

→ FORRESTER, 2025

WHAT FULL ADOPTION UNLOCKS

- **Self-service configuration:** business-owned workflows are a prerequisite for AI-assisted config changes
- **Automated plan change deployment:** AI can propose, test, and stage changes without manual intervention
- **Trusted reporting:** payees and managers who trust the numbers engage with AI-generated insights



Varicent

SAP

Xactly

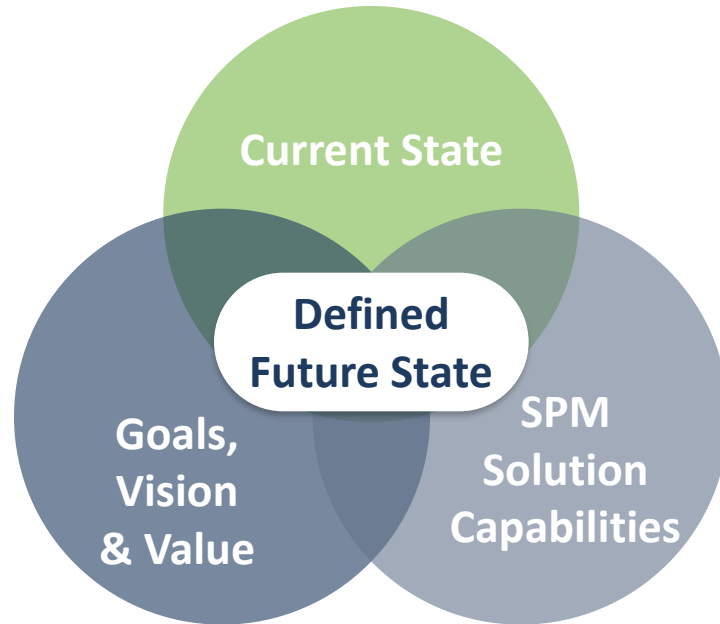


SECTION 03

■
Roadmap strategy



Spend the right amount of time upfront to ensure value realization



- ✓ **Use Case Definition**
- ✓ **Value assessment**
- ✓ **Approach Options**
- ✓ **Business case for change**

The Business Case Picks the Path

The business case decides the path — enterprise AI or vendor AI.

Enterprise AI

WHEN TO CHOOSE

- Value spans multiple domains and data sources
- Shared models & reusable assets matter
- Enterprise governance & scale required



Vendor / Platform AI

WHEN TO CHOOSE

- SPM-native AI hits ROI faster
- Use cases are packaged & pre-built
- Integration footprint is light



Migration

Port existing configuration over as-is — carrying forward legacy logic and technical debt.

RIGHT WHEN

Config is healthy, business processes are unchanged, and speed-to-cutover outweighs new capability gains.

WHY TEAMS CHOOSE IT

Fastest path to cutover with minimal change management — proven config moves over intact.

Re-implementation

Rebuild from the ground up — leveraging the newest platform capabilities and best practices.

RIGHT WHEN

Processes have evolved, AI & automation are on the roadmap, and the business case justifies a clean foundation.

WHY ANALYSTS BACK IT

60–70% of GenAI productivity gains require process redesign, not platform replacement alone. — *McKinsey*



Thank You

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Stage 1 FIX THE PLUMBING	Stage 2 SEE WHAT'S HAPPENING	Stage 3 MOVE AT BUSINESS SPEED	Stage 4 STRATEGIC INTELLIGENCE
<p data-bbox="208 248 324 266">0–12 months</p> <p data-bbox="65 323 436 364"><i>Trust the data. Trust the calculation. Remove every manual step from the core process.</i></p> <hr/> <p data-bbox="65 419 195 434">KEY ACTIONS</p> <ul data-bbox="65 463 452 722" style="list-style-type: none"> • Audit all data sources feeding IC — map every manual handoff • Implement or validate native connectors for top 3 upstream systems • Review and document every crediting rule — move tribal knowledge into the platform • Establish a single data model that governs all active comp plans <hr/> <p data-bbox="65 773 162 788">MEASURE</p> <ul data-bbox="65 823 436 974" style="list-style-type: none"> • Data reconciliation time: target < 2 hours per cycle • Credit dispute rate: target < 1% of transactions • Manual adjustment tickets: target 50% reduction 	<p data-bbox="668 248 784 266">6–18 months</p> <p data-bbox="529 323 900 364"><i>Every stakeholder sees what they need, when they need it, without asking IT.</i></p> <hr/> <p data-bbox="529 419 658 434">KEY ACTIONS</p> <ul data-bbox="529 463 915 722" style="list-style-type: none"> • Deploy payee-facing compensation statements — every payee can see their own calculation • Build management reporting on attainment and cost — in SPM or connected BI tool • Automate approval workflows — payment approval should never require email • Train business admins to operate the system without SI or IT support <hr/> <p data-bbox="529 773 625 788">MEASURE</p> <ul data-bbox="529 823 900 974" style="list-style-type: none"> • Payee self-service rate: target > 80% for common queries • Month-end close time: target 2-day reduction • Admin requests requiring IT: target zero for routine changes 	<p data-bbox="1122 248 1238 266">12–24 months</p> <p data-bbox="987 310 1373 375"><i>Plan changes deploy in days, not weeks. The system enables the business, not the other way around.</i></p> <hr/> <p data-bbox="987 419 1116 434">KEY ACTIONS</p> <ul data-bbox="987 463 1373 722" style="list-style-type: none"> • Reduce plan change cycle time: measure and target 50% reduction • Implement bulk adjustment capabilities for mid-year changes • Connect SPM data to BI for cross-functional analytics • Build internal capability: establish a center of excellence for comp system ownership <hr/> <p data-bbox="987 773 1083 788">MEASURE</p> <ul data-bbox="987 823 1358 974" style="list-style-type: none"> • Plan change cycle time: target < 5 business days • Ad-hoc analysis turnaround: target same-day • System-driven headcount: stabilize or reduce from current baseline 	<p data-bbox="1580 248 1696 266">18–36 months</p> <p data-bbox="1445 323 1835 364"><i>Use the platform to model, test, and optimize — not just record and report.</i></p> <hr/> <p data-bbox="1445 419 1574 434">KEY ACTIONS</p> <ul data-bbox="1445 463 1831 722" style="list-style-type: none"> • Deploy plan modeling: test new plan designs against historical data before launch • Activate quota planning within SPM — replace spreadsheet-based quota processes • Evaluate territory optimization: only viable when crediting and hierarchy are solid • Build AI/analytics use cases on top of clean, reliable SPM data <hr/> <p data-bbox="1445 773 1541 788">MEASURE</p> <ul data-bbox="1445 823 1831 974" style="list-style-type: none"> • Plans modeled before launch: target 100% • Quota variance vs. plan: measure and improve • Analytics-driven plan adjustments: establish baseline, trend improvement