



Customer Success Story

RAYMOND JAMES

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Candace Kirk, Business Operations



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Company Profile

Raymond James & Associates is a diversified holding company providing financial services to individuals, corporations and municipalities through its subsidiary companies engaged primarily in investment and financial planning, in addition to capital markets and asset management.

Company Size: **Medium Enterprise**

Industry: **Financial Services**

About Iconixx

Iconixx offers an enterprise-class sales performance management solution enabling organizations to align their corporate strategy and planning with sales execution. Organizations are able to budget and plan more efficiently, increase sales productivity, improve overall profitability by automating, analyzing and optimizing commission and incentive processes with Iconixx.

www.iconixx.com

Before Iconixx

Experienced the following challenges:

- › Manual calculations within Excel
- › Too much time spent on processing payments
- › Limited reporting

Purchased a Sales Compensation Management solution for the following

- › More accurate and timely commissions processing, reducing costly over/underpayments and sales rep churn
- › Increase transparency to compensation, reducing disputes

After Iconixx

Chose Iconixx over the competition for the following reasons:

- › Flexibility
- › Modeling, forecasting, planning

Likes the following about Iconixx:

- › Flexibility
- › Dashboards
- › Processing speed and ability to scale

Benefit with the highest positive impact to the organization:

- › Better visibility for sales reps

Other benefits since partnering with Iconixx:

- › Improved efficiency of commission payouts
- › Time spent on manual compensation calculations and statement creation is now spent on improving other processes and automating reporting to improve efficiency

"The staff from procurement to implementation was knowledgeable, helpful and friendly. The system has created 'free' time for me to work on projects I was holding off on and the statements going to the payees are clean and concise."

Candace Kirk, Business Operations