

Sold on Salesforce Integration: Finding A Connected Commission Management Software

How Mitratesch's Revenue Operations team unlocked seamless workflow and commission management with TAP.



The Company

Over the last thirty years, Mitratesch has helped over 1,800 corporate legal, risk & compliance, and HR companies leverage technology solutions for enhanced operational efficiency. Since launching its workflow automation solution (TAP) in 2019, Mitratesch has helped turn millions of manual requests into seamless workflows, even leveraging the solution internally for its HR, IT, Legal, and now Sales and Revenue Operations.

The Challenge

If you asked Mitratesch's Sales and Revenue team how they managed tasks like account assignments and payouts a month ago, they would (unenthusiastically) say it was through a combination of emails, chats, and spreadsheets. Alongside the Commission Analyst team, they managed the process manually, including capturing and assigning bookings to the correct Sales Reps, tracking commissions, and following up to ensure everyone was paid.

KRISTINA RODRIGUEZ, MITRATECH'S DIRECTOR OF REVENUE OPERATIONS, KNEW THERE HAD TO BE A BETTER WAY.

“We wanted to streamline the commission management process. Today, inbounds are coming from [microsoft] teams, from outlook, and it's hard to track. We've had instances where a decision was made, then changed. We didn't have the background or the decision trees to see how or why we pivoted.”

The team spent all day in and out of Salesforce, manually grabbing data to share with other departments. Moreover, their inability to share the platform and promote cross-selling opportunities impacted their day-to-day sales performance.

According to Kristina, Director of Revenue Operations at Mitratesh, account ownership and assignment were also gray areas. Seeing when an account changed hands, or when an opportunity moved from sales to service, was necessary for efficient business operations and fundamental to Mitratesh's values of transparency and ownership. The team needed better cross-departmental visibility to perform at its full potential.

The Solution

The Mitratesh Sales Op team was at an inflection point; their growing workload demanded an investment in new technology, but there wasn't time to train the team on a new solution, and no one wanted to get rid of Salesforce altogether. The decision to deploy Mitratesh's Automation Platform (TAP) ultimately came down to three key benefits:

1. Scalability
2. Ease of Integration
3. Cross-departmental collaboration

What had worked for their smaller team was now getting overwhelming to manage and prone to human error. Not only was it time to scale, but it was time to invest in a platform that would adapt to their growing needs for years to come.

Knowing that other business units were already using TAP to book sales consultant time, the decision to try it out for themselves was a no-brainer. First, the team conducted internal testing, launching two groups to pilot TAP and collecting feedback before venturing to the rest of the sales organization.

“The response was overwhelming—everyone is really excited about adopting TAP,” continued Kristina Rodriguez. “We tried SmartSheets in the past, and it doesn't even come close to the customization and integration with Salesforce that TAP has. It's hard to beat.”

The Results

Whereas Mitratesh's Operations and Analyst's team used to be responsible for factoring in coverage changes and other nuances while overseeing commission, the process can now unfurl in one intuitive workflow. From a centralized dashboard that integrates with Salesforce, Mitratesh's team can now manage all account details, see what's submitted, and share approved payments, adding visibility and trust to the payment process.

“Our Reps spend most of their days in Salesforce, so TAP's integration makes it a one-stop-shop for them— a place for self-service.”

More specifically, they're able to go in and manage accounts, click on buttons to get demos, view legal contracts, and now, for the first time ever, bubble up cross-sell opportunities to share with other business units.

So, what's next for the Mitratesh Sales Operations team now that they've streamlined the commission management process? We'll have to wait and see, but as Kristina explained, after this last integration with TAP, they're **“always game to automate more and more!”**

About Mitratesch

Mitratesch is a proven global technology partner for corporate legal, risk & compliance, and HR professionals seeking to maximize productivity, control expense, and mitigate risk by deepening operational alignment, increasing visibility, and spurring collaboration across their organization.

With Mitratesch's proven portfolio of end-to-end solutions, organizations worldwide are able to implement best practices and standardize processes across all lines of business to manage risk and ensure business continuity.

Mitratesch serves over 1,800 organizations worldwide spanning more than 160 countries.

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