



Improved compensation processes motivate client-facing teams at Marsh

Insurance and risk management leader transforms sales comp, delivering timely data to sellers, cutting time to pay in half, and freeing time for client service

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Customer Story

SOLUTIONS: Finance, Sales

INDUSTRY: Financial Services & Insurance

PARTNER:



Sales professionals at Marsh received data about opportunities and deal progress weeks late and had to navigate an inefficient sales process. These challenges took time away from client service. After implementing Anaplan, sellers at Marsh always have current sales data via a mobile application, can reconcile their transactions in half the time, and are compensated more frequently. This improved efficiency enables customer-facing teams to spend more time serving clients.

50%
faster pay cycle motivates sales professionals to accelerate opportunities

30-day
lag removed from sales data cycle helps client-facing teams prioritize activities

Increased
frequency of sales compensation due to more efficient processes



Working with clients is the core of Marsh's business.

As the world's leading insurance broker and risk advisor, Marsh's 45,000 employees provide clients in communities worldwide with insights, advice, and support to make their businesses better.

As Senior Vice President Finance for Global Operations, Kristen Jaffee ensures that Marsh's finance operations support the company's focus on client service. "We are overhauling the way our teams are organized, the technology that we're using, and the way that we support our clients," she explains. Part of that transformation involves sales compensation, incentive management, and planning processes.

Data at their fingertips

With the legacy systems used by Marsh, sales teams were frustrated by slow data delivery. "Our sales colleagues had to wait roughly 30 days to receive data," explains Steven Guerrero, Vice President, U.S. Sales Compensation. Stagnant data on new opportunities, deals in process, and progress toward goals made it challenging for salespeople to prioritize the clients and activities that would deliver the greatest positive impact. Data issues also limited Marsh leadership's ability to make informed decisions quickly and to adjust sales compensation plans to meet changing strategic initiatives.

The Marsh team selected Anaplan to address these challenges and help them extract value from existing data sources. They integrated Anaplan directly with Salesforce, enabling sales colleagues to model the value of their



current pipeline in Anaplan and prioritize their work. A mobile Anaplan application solved the problem of stale data and enabled salespeople to view their current compensation status anywhere, at any time. "They don't have to wait 30 days to see it," Guerrero says. "They can see it today."

Feeling the benefits

Marsh has cut the time salespeople need to reconcile transactions by about 50% with the Anaplan solution and can pay them more frequently now. "Our colleagues using the system can feel that benefit," Jaffee says. "Our sales teams have become more motivated because they can see how lucrative any deal will be to them at any given point in time."

Because sales teams and client advisors can navigate the sales process more efficiently, they can focus their attention on the important work that supports Marsh's advisory mission. "Anaplan has enabled more time to be spent with clients," Jaffee says, "which is how it should be."



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**Kristin Jaffee, Senior Vice President
Finance for Global Operations**

About Anaplan

Anaplan is a transformative way to see, plan, and run your business. Using our proprietary Hyperblock™ technology, Anaplan lets you contextualize real-time performance, and forecast future outcomes for faster, confident decisions. Anaplan enables connected strategy and planning across your enterprise to move your business forward. Based in San Francisco, Anaplan has over 200 partners and more than 2,000 customers worldwide.

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