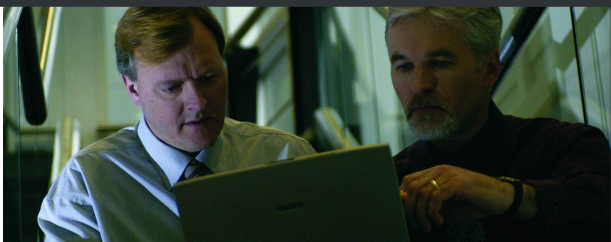


SALES COMPENSATION PLANNING



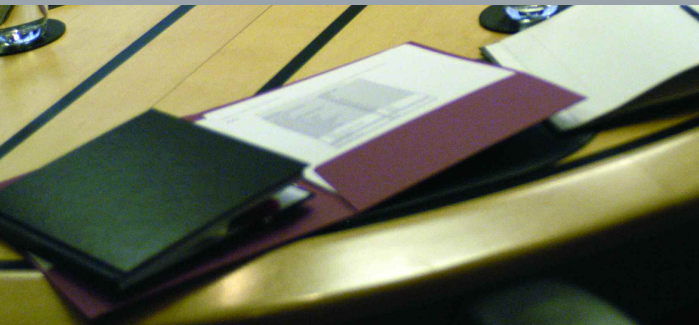
**PLAN-TO-PERFORM
BLUEPRINT**

**A WEB-BASED PROCESS FOR MANAGING
SALES COMPENSATION**

**A COGNOS INNOVATION CENTER
ENTERPRISE PLANNING
APPLICATION BRIEF**

EXECUTIVE SUMMARY

This application brief demonstrates a Web-based planning process for managing sales compensation forecasts using Cognos Planning. Creating an accurate, reliable compensation projection through the Sales Compensation Planning process is critical for motivating the sales organization to meet or exceed revenue targets. This *Blueprint* enables organizations to manage compensation targets and commission payouts, archive historical data and previous projections for reference and analysis, and link sales compensation plans with headcount projections and integrated financials. This *Blueprint* provides compensation plans based on revenue information linked from the *Sales Planning and Forecasting Blueprint*.



OVERVIEW

The *Sales Compensation Blueprint* enables an organization to motivate the sales force by communicating the calculation of commission and bonus payouts, monthly base salary amounts, and any other sales incentive programs, and compares this information against annual target payouts. The *Blueprint* also enables the organization to provide monthly draw amounts as new sales team members build revenue pipelines. The *Blueprint* requires minimal user input, since calculations are based upon information linked from the *Sales Planning and Forecasting Blueprint*. Finally, the *Blueprint* provides a *Sandbox* tab for individuals to modify revenue projections and examine the impact on commission compensation. The *Sales Compensation Planning Blueprint* supports an effective, intuitive and integrated sales compensation planning process and resolves the challenges of coordinating compensation plans with sales projections.

BLUEPRINT OBJECTIVES

The *Sales Compensation Planning Blueprint* achieves a number of planning objectives:

- Demonstrates automated planning by generating sales compensation projections based on revenue forecasts from the *Sales Planning and Forecasting Blueprint*.
- Provides historical and plan data for variance reporting.
- Produces immediate compensation information by sales representative and by region.
- Provides compensation breakout information including base salary, commissions, bonuses and other sales incentive programs.
- Validates compensation plans against individual targets.
- Provides a “sandbox” area for *what-if* analysis by sales person.
- Passes sales compensation projections to the *Headcount and Compensation Planning Blueprint*.

KEY COGNOS PLANNING BENEFITS:

- Flexible and powerful model development using Cognos Analyst to support any business planning model or customized *Sales Compensation Planning Blueprint*.
- Web-based deployment of models for process workflow, data collection, and consolidation.
 - Real-time workflow.
 - Real-time consolidation.
 - Real-time calculations in the browser for immediate results.
 - Industry-leading *what-if* features for the most accurate plans, budgets, and forecasts.
- Scalable architecture with proven deployments to thousands of users.
- Easily linked financial and operational plans to ensure collaboration across the corporation.
- Ensured plan accuracy using form-based planning with selection boxes to drive application logic and calculations.

REPRESENTATIVE WORKFLOW

The *Sales Compensation Planning Blueprint* is designed to be used by sales organizations, including sales representatives closest to the revenue projections, as well as sales management. Individuals in the human resources organizations would use the *Blueprint* for review and alignment purposes.

The following sections of this document describe the basic workflows in which a sales representative might participate during the sales compensation planning process.

INDIVIDUAL INFORMATION

The first tab in the *Sales Compensation Planning Blueprint, Individual Information*, contains information about individual sales representatives. The base information—position, department, and sales plan—is read-only. This tab requires input only for those sales representatives experiencing a position change, a department change, or requiring a start month if a new hire. If a change results in a change to the sales representative’s sales plan, that new plan will be linked into this tab. If no selections are made in the tab, the *Blueprint* calculations in the remaining tabs are assumed to start in January and are based upon the position, department, and sales plan shown here.

Individual Information		Commission Calc	Commission Summary	Customer Satisfaction	Bonus Calc	Salary Summary	Sandbox	Sales Plan Matrix
SCHIPPER, JESS								
CURRENT INFORMATION								
Position	Sales Trainee							
Department	Southwest Sales							
Sales Plan	Sales Plan 2							
CHANGES								
Start Month, if New Hire								
Position Change?								
Start Month for Position Change								
New Position								
Department Change?								
Start Month for Department Change								
New Department								
New Sales Plan								
Warning								

Individual Information		Commission Calc	Commission Summary	Customer Satisfaction	Bonus Calc	Salary Summary	Sandbox	Sales Plan Matrix
SCHIPPER, JESS								
CURRENT INFORMATION								
Position	Sales Trainee							
Department	Southwest Sales							
Sales Plan	Source = Payroll System							
CHANGES								
Start Month, if New Hire								
Position Change?								
Start Month for Position Change								
New Position								
Department Change?								
Start Month for Department Change								
New Department								
New Sales Plan								
Warning								

Individual Information		Commission Calc	Commission Summary	Customer Satisfaction	Bonus Calc	Salary Summary	Sandbox	Sales Plan Matrix
SCHIPPER, JESS								
CURRENT INFORMATION								
Position	Sales Trainee							
Department	Southwest Sales							
Sales Plan	Sales Plan 2							
CHANGES								
Start Month, if New Hire	Source = Sales Plan Matrix Tab							
Position Change?								
Start Month for Position Change								
New Position								
Department Change?								
Start Month for Department Change								
New Department								
New Sales Plan								
Warning								



SCHIPPER, JESS	
CURRENT INFORMATION	
Position	Sales Trainee
Department	Southwest Sales
Sales Plan	Sales Plan 2
CHANGES	
Start Month, if New Hire	
Position Change?	Jan
Start Month for Position Change	Feb
New Position	Mar
Department Change?	Apr
Start Month for Department Change	May
New Department	Jun
New Sales Plan	Jul
Warning	Aug
	Sep
	Oct
	Nov
	Dec



SCHIPPER, JESS	
CURRENT INFORMATION	
Position	Sales Trainee
Department	Southwest Sales
Sales Plan	Sales Plan 2
CHANGES	
Start Month, if New Hire	Feb
Position Change?	
Start Month for Position Change	Y
New Position	N
Department Change?	
Start Month for Department Change	
New Department	
New Sales Plan	
Warning	



SCHIPPER, JESS	
CURRENT INFORMATION	
Position	Sales Trainee
Department	Southwest Sales
Sales Plan	Sales Plan 2
CHANGES	
Start Month, if New Hire	Feb
Position Change?	Y
Start Month for Position Change	
New Position	
Department Change?	
Start Month for Department Change	
New Department	
New Sales Plan	
Warning	Start Month for New Position Required



SCHIPPER, JESS	
CURRENT INFORMATION	
Position	Sales Trainee
Department	Southwest Sales
Sales Plan	Sales Plan 2
CHANGES	
Start Month, if New Hire	Feb
Position Change?	Y
Start Month for Position Change	
New Position	Jan
Department Change?	Feb
Start Month for Department Change	Mar
New Department	Apr
New Sales Plan	May
Warning	Jun
	Jul
	Aug
	Sep
	Oct
	Nov

CURRENT INFORMATION	
Position	Sales Trainee
Department	Southwest Sales
Sales Plan	Sales Plan 2
CHANGES	
Start Month, if New Hire	Feb
Position Change?	Y
Start Month for Position Change	Jul
New Position	
Department Change?	
Start Month for Department Change	
New Department	
New Sales Plan	
Warning	New Position Required

CURRENT INFORMATION	
Position	Sales Trainee
Department	Southwest Sales
Sales Plan	Sales Plan 2
CHANGES	
Start Month, if New Hire	Feb
Position Change?	Y
Start Month for Position Change	Jul
New Position	
Department Change?	Sales Trainee
Start Month for Department Change	Sales Representative
New Department	Senior Sales Representative
New Sales Plan	National Accounts Manager
Warning	New Position Required

CURRENT INFORMATION	
Position	Sales Trainee
Department	Southwest Sales
Sales Plan	Sales Plan 2
CHANGES	
Start Month, if New Hire	Feb
Position Change?	Y
Start Month for Position Change	Jul
New Position	Sales Representative
Department Change?	
Start Month for Department Change	
New Department	
New Sales Plan	Sales Plan 2
Warning	

CURRENT INFORMATION	
Position	Sales Trainee
Department	Southwest Sales
Sales Plan	Sales Plan 2
CHANGES	
Start Month, if New Hire	Feb
Position Change?	Y
Start Month for Position Change	Jul
New Position	Sales Representative
Department Change?	
Start Month for Department Change	Y
New Department	N
New Sales Plan	Sales Plan 2
Warning	



SCHIPPER, JESS	
CURRENT INFORMATION	
Position	Sales Trainee
Department	Southwest Sales
Sales Plan	Sales Plan 2
CHANGES	
Start Month, if New Hire	Feb
Position Change?	Y
Start Month for Position Change	Jul
New Position	Sales Representative
Department Change?	Y
Start Month for Department Change	
New Department	
New Sales Plan	Sales Plan 2
Warning	Start Month for New Department Required



SCHIPPER, JESS	
CURRENT INFORMATION	
Position	Sales Trainee
Department	Southwest Sales
Sales Plan	Sales Plan 2
CHANGES	
Start Month, if New Hire	Feb
Position Change?	Y
Start Month for Position Change	Jul
New Position	Sales Representative
Department Change?	Y
Start Month for Department Change	
New Department	Jan
New Sales Plan	Feb
Warning	Mar
	Apr
	May
	Jun
	Jul
	Aug
	Sep
	Oct
	Nov
	Dec



SCHIPPER, JESS	
CURRENT INFORMATION	
Position	Sales Trainee
Department	Southwest Sales
Sales Plan	Sales Plan 2
CHANGES	
Start Month, if New Hire	Feb
Position Change?	Y
Start Month for Position Change	Jul
New Position	Sales Representative
Department Change?	Y
Start Month for Department Change	Dec
New Department	
New Sales Plan	Sales Plan 2
Warning	New Department Required

SCHIPPER, JESS	
CURRENT INFORMATION	
Position	Sales Trainee
Department	Southwest Sales
Sales Plan	Sales Plan 2
CHANGES	
Start Month, if New Hire	Feb
Position Change?	Y
Start Month for Position Change	Jul
New Position	Sales Representative
Department Change?	Y
Start Month for Department Change	Dec
New Department	▼
New Sales Plan	<ul style="list-style-type: none"> Northeast Sales Southwest Sales Midwest Sales Northwest Sales Southwest Sales UK Sales Outside of Sales
Warning	

SCHIPPER, JESS	
CURRENT INFORMATION	
Position	Sales Trainee
Department	Southwest Sales
Sales Plan	Sales Plan 2
CHANGES	
Start Month, if New Hire	Feb
Position Change?	Y
Start Month for Position Change	Jul
New Position	Sales Representative
Department Change?	Y
Start Month for Department Change	Dec
New Department	Southwest Sales ▼
New Sales Plan	Sales Plan 2
Warning	New Department Must Differ From Current Department

SCHIPPER, JESS	
CURRENT INFORMATION	
Position	Sales Trainee
Department	Southwest Sales
Sales Plan	Sales Plan 2
CHANGES	
Start Month, if New Hire	Feb
Position Change?	Y
Start Month for Position Change	Jul
New Position	Sales Representative
Department Change?	Y
Start Month for Department Change	Dec
New Department	Northeast Sales ▼
New Sales Plan	Sales Plan 1
Warning	

REVENUE EXCEPTIONS

The *Revenue Exceptions* tab is used to link Revenue forecast information from the *Sales Planning and Forecasting Blueprint*. Revenue values can be adjusted before being used to calculate sales commission. For instance, a sales opportunity involving two sales representatives results in split commission. The revenue information is linked from the *Sales Planning and Forecasting Blueprint* by running a System Link in Cognos Planning (allows one application to pass information to another application). The updated revenue information is also compared against annual targets.

Individual Information									
Revenue Exceptions									
Commission Calc									
Commission Summary									
Customer Satisfaction									
Bonus Calc									
Sales Summary									
Sandbox									
SCHUPPER, JESS									
Current Forecast									
Individual Information	Description	Jan	Feb	Mar	Q1	Apr	May	Jun	Q2
Position	Sales Trainer								
Department	Southwest Sales								
Sales Plan	Sales Plan 2								
REVENUE ADJUSTMENTS									
Revenue		0	0	0	0	0	0	0	0
Revenue Adjustment 1		0	0	0	0	0	0	0	0
Revenue Adjustment 2		0	0	0	0	0	0	0	0
Revenue Adjustment 3		0	0	0	0	0	0	0	0
Revenue Adjustment 4		0	0	0	0	0	0	0	0
Revenue Adjustment 5		0	0	0	0	0	0	0	0
Revenue Adjustment 6		0	0	0	0	0	0	0	0
Revenue Adjustment 7		0	0	0	0	0	0	0	0
Revenue Adjustment 8		0	0	0	0	0	0	0	0
Revenue Adjustment 9		0	0	0	0	0	0	0	0
Revenue Adjustment 10		0	0	0	0	0	0	0	0
Revenue for Commission Calc		0	0	0	0	0	0	0	0
Cumulative Revenue		0	0	0	0	0	0	0	0
Annual Revenue Target		550,000	550,000	550,000	550,000	550,000	550,000	550,000	550,000
Percent of Annual Target Achieved		0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
System Flag		Actual	Actual	Actual	Forecast	Forecast	Forecast	Forecast	Forecast

SalesCompensationPlanning | Contributions | SCHIFFER, JESS - Credits Planning - Contributor

Individual Information | **Revenue Exception** | Commission Calc | Commission Gateway | Customer Satisfaction | Bonus Calc | Salary Gateway | Goals

SCHIFFER, JESS | Current Forecast

Description	Jan	Feb	Mar	Q1	Apr	May	Jun	Q2
INDIVIDUAL INFORMATION								
Position	Sales Trainee	Sales Trainee	Sales Trainee		Sales Trainee	Sales Trainee	Sales Trainee	
Department	Southwest Sales	Southwest Sales	Southwest Sales		Southwest Sales	Southwest Sales	Southwest Sales	
Sales Plan	Sales Plan 2	Sales Plan 2	Sales Plan 2		Sales Plan 2	Sales Plan 2	Sales Plan 2	
REVENUE ADJUSTMENTS								
Revenue	0	0	0	0	0	0	0	0
Revenue Adjustment 1	0	0	0	0	0	0	0	0
Revenue Adjustment 2	0	0	0	0	0	0	0	0
Revenue Adjustment 3	0	0	0	0	0	0	0	0
Revenue Adjustment 4	0	0	0	0	0	0	0	0
Revenue Adjustment 5	0	0	0	0	0	0	0	0
Revenue Adjustment 6	0	0	0	0	0	0	0	0
Revenue Adjustment 7	0	0	0	0	0	0	0	0
Revenue Adjustment 8	0	0	0	0	0	0	0	0
Revenue Adjustment 9	0	0	0	0	0	0	0	0
Revenue Adjustment 10	0	0	0	0	0	0	0	0
Revenue for Commission Calc	0	0	0	0	0	0	0	0
Cumulative Revenue								
Annual Revenue Target	550,000	550,000	550,000	550,000	550,000	550,000	550,000	550,000
Percent of Annual Target Achieved	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
System Flag	Actual	Actual	Actual		Forecast	Forecast	Forecast	

Current owner: bshahar

Get Data

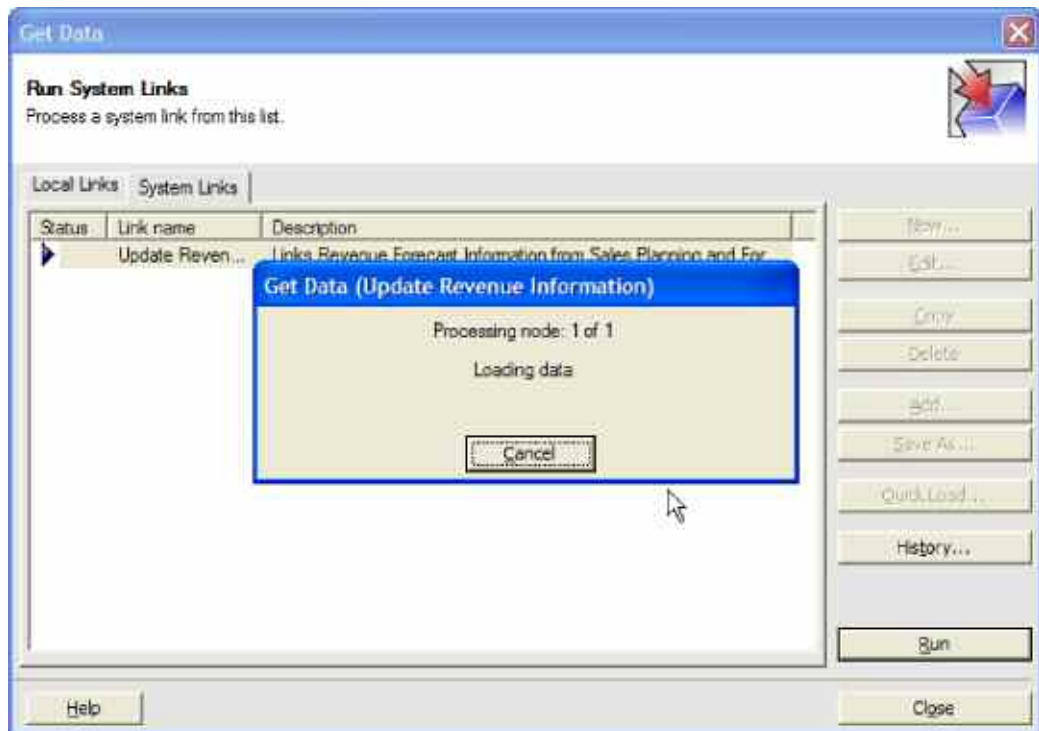
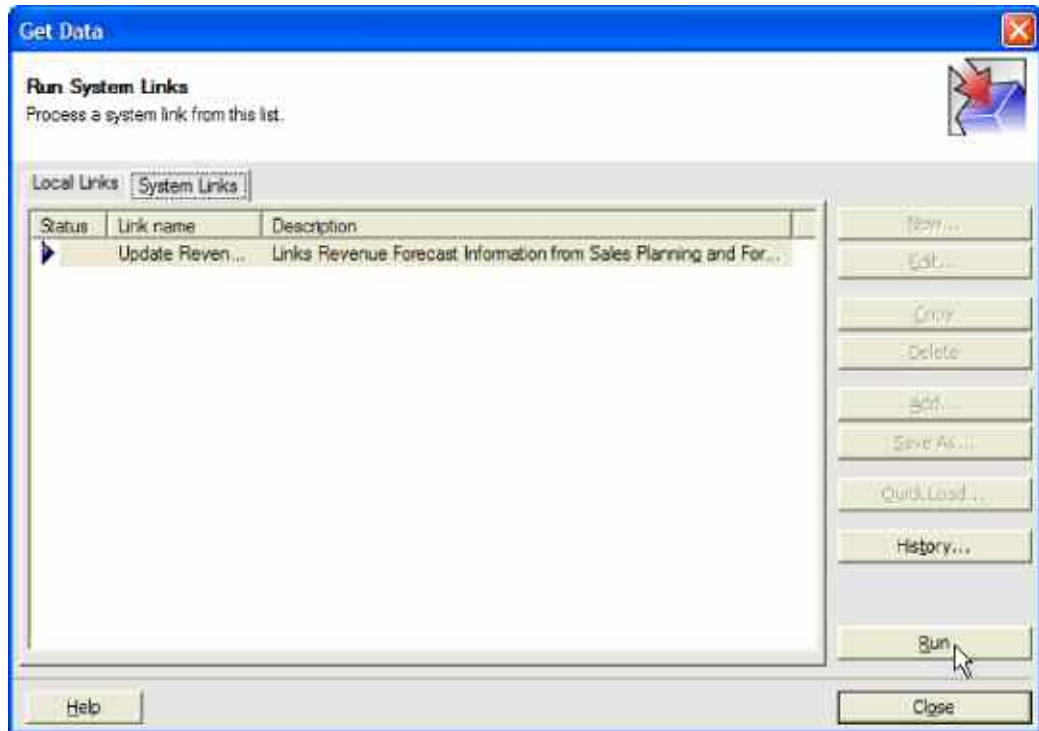
Run System Links
Process a system link from this list.

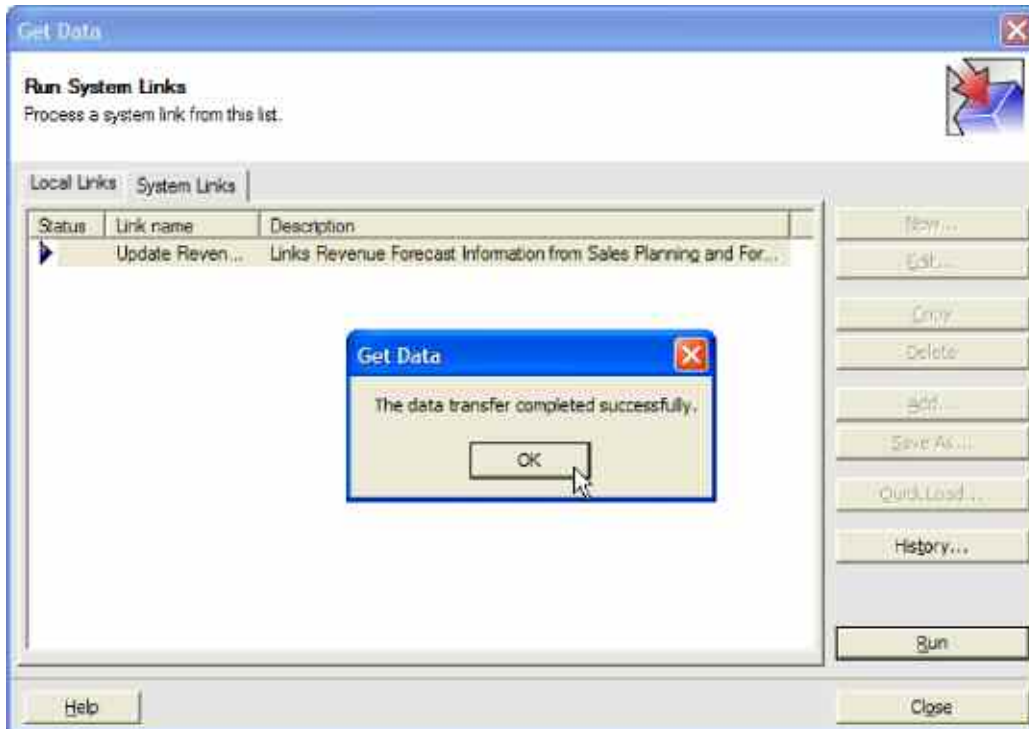
Local Links | **System Links**

Status	Link name	Description
▶	Update Reven...	Links Revenue Forecast Information from Sales Planning and For...

Run...
Edit...
Copy
Delete
Edit...
Save As...
Quick Load...
History...
Run
Close

Help





Individual Information	Revenue Exceptions	Commission Calc	Commission Summary	Customer Satisfaction	Bonus Calc	Sales Summary	Sandbox		
SCHUPPER, JESS									
Linked Forecast									
	Discretion	Jan	Feb	Mar	Q1	Apr	May	Jun	Q2
INDIVIDUAL INFORMATION									
Position		Sales Trainee	Sales Trainee	Sales Trainee		Sales Trainee	Sales Trainee	Sales Trainee	
Department		Southwest Sales	Southwest Sales	Southwest Sales		Southwest Sales	Southwest Sales	Southwest Sales	
Sales Plan		Sales Plan 2	Sales Plan 2	Sales Plan 2		Sales Plan 2	Sales Plan 2	Sales Plan 2	
REVENUE ADJUSTMENTS									
Revenue		84,835	88,551	107,495	290,881	128,247	142,268	155,773	416,288
Revenue Adjustment 1		0	0	0	0	0	0	0	0
Revenue Adjustment 2		0	0	0	0	0	0	0	0
Revenue Adjustment 3		0	0	0	0	0	0	0	0
Revenue Adjustment 4		0	0	0	0	0	0	0	0
Revenue Adjustment 5		0	0	0	0	0	0	0	0
Revenue Adjustment 6		0	0	0	0	0	0	0	0
Revenue Adjustment 7		0	0	0	0	0	0	0	0
Revenue Adjustment 8		0	0	0	0	0	0	0	0
Revenue Adjustment 9		0	0	0	0	0	0	0	0
Revenue Adjustment 10		0	0	0	0	0	0	0	0
Revenue for Commission Calc		84,835	88,551	107,495	290,881	128,247	142,268	155,773	416,288
Cumulative Revenue		84,835	163,386	290,881	290,881	419,129	561,407	757,266	757,266
Annual Revenue Target		550,000	550,000	550,000	550,000	550,000	550,000	550,000	550,000
Percent of Annual Target Achieved		15.42%	33.34%	52.89%	52.89%	76.21%	102.09%	137.68%	137.68%
Version Flag		Actual	Actual	Actual		Forecast	Forecast	Forecast	

Individual Information		Revenue Exceptions	Commission Calc	Commission Summary	Customer Satisfaction	Bonus Calc	Sales Summary	Sandbox	
SCHUPPER, JESS		Current Forecast							
Individual Information	Description	Jan	Feb	Mar	Q1	Apr	May	Jun	Q2
Position	Sales Trainer	Sales Trainer	Sales Trainer	Sales Trainer		Sales Trainer	Sales Trainer	Sales Trainer	
Department	Southwest Sales	Southwest Sales	Southwest Sales	Southwest Sales		Southwest Sales	Southwest Sales	Southwest Sales	
Sales Plan	Sales Plan 2	Sales Plan 2	Sales Plan 2	Sales Plan 2		Sales Plan 2	Sales Plan 2	Sales Plan 2	
REVENUE ADJUSTMENTS									
Revenue		84,835	90,551	107,496	290,881	128,247	142,358	155,729	466
Revenue Adjustment 1	Commission Spk	0	0	0	0	0	0	0	0
Revenue Adjustment 2		0	0	0	0	0	0	0	0
Revenue Adjustment 3		0	0	0	0	0	0	0	0
Revenue Adjustment 4		0	0	0	0	0	0	0	0
Revenue Adjustment 5		0	0	0	0	0	0	0	0
Revenue Adjustment 6		0	0	0	0	0	0	0	0
Revenue Adjustment 7		0	0	0	0	0	0	0	0
Revenue Adjustment 8		0	0	0	0	0	0	0	0
Revenue Adjustment 9		0	0	0	0	0	0	0	0
Revenue Adjustment 10		0	0	0	0	0	0	0	0
Revenue for Commission Calc		84,835	90,551	107,496	290,881	128,247	142,358	155,729	466
Cumulative Revenue		84,835	183,386	290,881	290,881	419,129	561,487	757,266	757
Annual Revenue Target		590,000	590,000	590,000	600,000	590,000	590,000	590,000	600
Percent of Annual Target Achieved		15.42%	33.54%	52.89%	52.89%	76.21%	102.89%	137.68%	137
Version Flag		Actual	Actual	Actual		Forecast	Forecast	Forecast	

Current error: Invalid

Individual Information		Revenue Exceptions	Commission Calc	Commission Summary	Customer Satisfaction	Bonus Calc	Sales Summary	Sandbox	
SCHUPPER, JESS		Current Forecast							
Individual Information	Description	Jan	Feb	Mar	Q1	Apr	May	Jun	Q2
Position	Sales Trainer	Sales Trainer	Sales Trainer	Sales Trainer		Sales Trainer	Sales Trainer	Sales Trainer	
Department	Southwest Sales	Southwest Sales	Southwest Sales	Southwest Sales		Southwest Sales	Southwest Sales	Southwest Sales	
Sales Plan	Sales Plan 2	Sales Plan 2	Sales Plan 2	Sales Plan 2		Sales Plan 2	Sales Plan 2	Sales Plan 2	
REVENUE ADJUSTMENTS									
Revenue		84,835	90,551	107,496	290,881	128,247	142,358	155,729	466
Revenue Adjustment 1	Commission Spk	0	0	0	0	0	0	0	0
Revenue Adjustment 2		0	0	0	0	0	0	0	0
Revenue Adjustment 3		0	0	0	0	0	0	0	0
Revenue Adjustment 4		0	0	0	0	0	0	0	0
Revenue Adjustment 5		0	0	0	0	0	0	0	0
Revenue Adjustment 6		0	0	0	0	0	0	0	0
Revenue Adjustment 7		0	0	0	0	0	0	0	0
Revenue Adjustment 8		0	0	0	0	0	0	0	0
Revenue Adjustment 9		0	0	0	0	0	0	0	0
Revenue Adjustment 10		0	0	0	0	0	0	0	0
Revenue for Commission Calc		84,835	90,551	107,496	290,881	128,247	142,358	155,729	466
Cumulative Revenue		84,835	183,386	290,881	290,881	419,129	561,487	757,266	757
Annual Revenue Target		590,000	590,000	590,000	600,000	590,000	590,000	590,000	600
Percent of Annual Target Achieved		15.42%	33.54%	52.89%	52.89%	76.21%	102.89%	137.68%	137
Version Flag		Actual	Actual	Actual		Forecast	Forecast	Forecast	

Current error: Invalid

Individual Information		Revenue Exception	Commission Calc	Commission Summary	Customer Satisfaction	Bonus Calc	Sales Summary	Endorse	
SCHUPPER, JESS		Current Forecast							
Individual Information	Description	Jan	Feb	Mar	Q1	Apr	May	Jun	Q2
Position	Sales Trainer								
Department	Southwest Sales								
Sales Plan	Sales Plan 2								
REVENUE ADJUSTMENTS									
Revenue		84,436	98,551	107,496	290,483	124,247	142,358	155,729	466,334
Revenue Adjustment 1	Commission Split	0	0	0	0	87,000	0	0	87,000
Revenue Adjustment 2		0	0	0	0	0	0	0	0
Revenue Adjustment 3		0	0	0	0	0	0	0	0
Revenue Adjustment 4		0	0	0	0	0	0	0	0
Revenue Adjustment 5		0	0	0	0	0	0	0	0
Revenue Adjustment 6		0	0	0	0	0	0	0	0
Revenue Adjustment 7		0	0	0	0	0	0	0	0
Revenue Adjustment 8		0	0	0	0	0	0	0	0
Revenue Adjustment 9		0	0	0	0	0	0	0	0
Revenue Adjustment 10		0	0	0	0	0	0	0	0
Revenue for Commission Calc		84,436	98,551	107,496	290,483	78,247	142,358	155,729	416,334
Cumulative Revenue		84,436	183,386	290,881	290,881	369,128	511,487	707,266	707,266
Actual Revenue Target		550,000	550,000	550,000	550,000	550,000	550,000	550,000	550,000
Percent of Annual Target Achieved		15.42%	33.34%	52.89%	52.89%	67.11%	93.00%	128.59%	128.59%
Version Flag		Actual	Actual	Actual		Forecast	Forecast	Forecast	

Current cover: 128.59%

COMMISSION CALCULATION

The tab called *Commission Calc* is used to calculate the commission payout amounts for each sales representative, based on revenue projections from the *Revenue Exceptions* tab.

The commission calculation is based on a tiered system, in which achievement of certain targets leads to higher commission percentages. Note that in this commission calculation module, there are three tiers. The first tier applies to all revenues up to 50 percent of the sales representative's annual target. The second tier applies to revenues between 50 percent and 100 percent of the annual target. Finally, the third tier applies to the revenues greater than 100 percent of the annual target. The commission percentage information is linked from the *Commission Components Matrix* tab.

In this example, the sales representative reaches the Tier 2 payout level in March, and reaches the Tier 3 payout level in June.

	Jan	Feb	Mar	Q1	Apr	May	Jun	Q2	Jul	
INDIVIDUAL INFORMATION										
Position	Sales Trainee	Sales Trainee	Sales Trainee		Sales Trainee	Sales Trainee	Sales Trainee			
Department	Southwest Sales	Southwest Sales	Southwest Sales		Southwest Sales	Southwest Sales	Southwest Sales			
Sales Plan	Sales Plan 2	Sales Plan 2	Sales Plan 2		Sales Plan 2	Sales Plan 2	Sales Plan 2			
REVENUE AND TARGET INFORMATION										
Revenue	84,835	90,551	107,496	290,881	128,247	142,358	195,779	466,385		
Revenue Adjustments	0	0	0	0	(50,000)	0	0	(50,000)		
Revenue for Commission Calc	84,835	90,551	107,496	290,881	78,247	142,358	195,779	416,385		
Cumulative Revenue	84,835	183,386	290,881	290,881	368,129	511,487	707,266	707,266		
Annual Revenue Target	550,000	550,000	550,000	550,000	550,000	550,000	550,000	550,000		
Percent of Annual Target Achieved	15.42%	33.34%	52.89%	52.89%	67.11%	93.00%	128.59%	128.59%		
Quarterly Revenue Target	137,500	137,500	137,500	137,500	137,500	137,500	137,500	137,500		
QTD Revenue	84,835	183,386	290,881	290,881	78,247	220,606	416,385	416,385		
Percent of Quarterly Target Achieved	61.83%	133.33%	211.68%	211.68%	56.25%	159.93%	302.89%	302.89%		
COMMISSION CALCULATION										
Revenue for Commission Tier 1	84,835	90,551	91,614	275,000	0	0	0	0		
Revenue for Commission Tier 2	0	0	15,881	15,881	128,247	142,358	38,513	389,110		
Revenue for Commission Tier 3	0	0	0	0	0	0	157,266	157,266		
Commission % Tier 1 (Up to 50% of Annual Target)	5%	5%	5%	5%	5%	5%	5%	5%		
Commission % Tier 2 (50% to 100% of Annual Target)	7%	7%	7%	7%	7%	7%	7%	7%		
Commission % Tier 3 (100%+ of Annual Target)	10%	10%	10%	10%	10%	10%	10%	10%		
Commission Tier 1	4,242	4,528	4,581	13,750	0	0	0	0		
Commission Tier 2	0	0	1,112	1,112	8,977	9,965	2,696	21,630		
Commission Tier 3	0	0	0	0	0	0	15,727	15,727		
Sales Promotion Incentive Fund (SPIF)	0	0	0	0	0	500	100	(1,400)		
Commission	4,242	4,528	5,692	14,862	8,977	9,965	18,523	36,965		
Cumulative Commission	4,242	9,180	14,872	14,862	23,739	32,304	50,827	50,827		
Annual Commission Target	33,000	33,000	33,000	33,000	33,000	33,000	33,000	33,000		
Percent of Target Commission Achieved	12.85%	27.79%	45.04%	45.04%	70.42%	97.89%	154.02%	154.02%		
Reason Flag	Actual	Actual	Actual		Forecast	Forecast	Forecast			

Individual Information		Revenue Exceptions		Commission Calc		Commission Summary		Customer Satisfaction		Bonus Calc		Sales Summary		Scoreboard	
SCHUPPER, JESS		Current Forecast													
INDIVIDUAL INFORMATION		Jan	Feb	Mar	Q1	Apr	May	Jun	Q2	Jul					
Position	Sales Trainer	Sales Trainer	Sales Trainer	Sales Trainer		Sales Trainer	Sales Trainer	Sales Trainer							
Department	Southwest Sales	Southwest Sales	Southwest Sales	Southwest Sales		Southwest Sales	Southwest Sales	Southwest Sales							
Sales Plan	Sales Plan 2	Sales Plan 2	Sales Plan 2	Sales Plan 2		Sales Plan 2	Sales Plan 2	Sales Plan 2							
REVENUE AND TARGET INFORMATION															
Revenue	84,835	98,551	107,496	290,881	126,247	142,358	195,779	466,385							
Revenue Adjustments	0	0	0	0	(50,000)	0	0	(50,000)							
Revenue for Commission Calc	84,835	98,551	107,496	290,881	76,247	142,358	195,779	416,385							
Cumulative Revenue	84,835	183,386	290,881	290,881	367,129	511,487	707,266	707,266							
Annual Revenue Target	550,000	550,000	550,000	550,000	550,000	550,000	550,000	550,000							
Percent of Annual Target Achieved	15.42%	33.34%	52.89%	52.89%	67.11%	93.00%	128.59%	128.59%							
Quarterly Revenue Target	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000							
QTD Revenue	84,835	183,386	290,881	290,881	76,247	220,606	416,385	416,385							
Percent of Quarterly Target Achieved	84.83%	183.38%	290.88%	290.88%	76.25%	220.61%	416.38%	416.38%							
COMMISSION CALCULATION															
Revenue for Commission Tier 1	84,835	98,551	91,614	275,000	0	0	0	0							
Revenue for Commission Tier 2	0	0	15,881	15,881	126,247	142,358	38,513	309,110							
Revenue for Commission Tier 3	0	0	0	0	0	0	157,266	157,266							
Commission % Tier 1 (Up to 50% of Annual Target)	5%	5%	5%	5%	5%	5%	5%	5%							
Commission % Tier 2 (50%-100% of Annual Target)	7%	7%	7%	7%	7%	7%	7%	7%							
Commission % Tier 3 (100%+ of Annual Target)	10%	10%	10%	10%	10%	10%	10%	10%							
Commission Tier 1	4,242	4,928	4,581	13,750	0	0	0	0							
Commission Tier 2	0	0	1,112	1,112	8,977	9,965	2,606	21,630							
Commission Tier 3	0	0	0	0	0	0	15,722	15,722							
Sales Promotion Incentive Fund (SPF)	0	0	0	0	600	900	100	(1,400)							
Commission	4,242	4,928	5,692	14,862	8,977	9,865	18,523	35,965							
Cumulative Commission	4,242	9,169	14,862	14,862	23,739	32,304	50,827	50,827							
Annual Commission Target	33,000	33,000	33,000	33,000	33,000	33,000	33,000	33,000							
Percent of Target Commission Achieved	12.85%	27.79%	45.04%	45.04%	70.42%	97.89%	154.02%	154.02%							
Version Flag	Actual	Actual	Actual		Forecast	Forecast	Forecast								

Current owner: Snelson

Individual Information		Revenue Exceptions		Commission Calc		Commission Summary		Customer Satisfaction		Bonus Calc		Sales Summary		Scoreboard	
SCHUPPER, JESS		Current Forecast													
INDIVIDUAL INFORMATION		Jan	Feb	Mar	Q1	Apr	May	Jun	Q2	Jul					
Position	Sales Trainer	Sales Trainer	Sales Trainer	Sales Trainer		Sales Trainer	Sales Trainer	Sales Trainer							
Department	Southwest Sales	Southwest Sales	Southwest Sales	Southwest Sales		Southwest Sales	Southwest Sales	Southwest Sales							
Sales Plan	Sales Plan 2	Sales Plan 2	Sales Plan 2	Sales Plan 2		Sales Plan 2	Sales Plan 2	Sales Plan 2							
REVENUE AND TARGET INFORMATION															
Revenue	84,835	98,551	107,496	290,881	126,247	142,358	195,779	466,385							
Revenue Adjustments	0	0	0	0	(50,000)	0	0	(50,000)							
Revenue for Commission Calc	84,835	98,551	107,496	290,881	76,247	142,358	195,779	416,385							
Cumulative Revenue	84,835	183,386	290,881	290,881	367,129	511,487	707,266	707,266							
Annual Revenue Target	550,000	550,000	550,000	550,000	550,000	550,000	550,000	550,000							
Percent of Annual Target Achieved	15.42%	33.34%	52.89%	52.89%	67.11%	93.00%	128.59%	128.59%							
Quarterly Revenue Target	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000							
QTD Revenue	84,835	183,386	290,881	290,881	76,247	220,606	416,385	416,385							
Percent of Quarterly Target Achieved	84.83%	183.38%	290.88%	290.88%	76.25%	220.61%	416.38%	416.38%							
COMMISSION CALCULATION															
Revenue for Commission Tier 1	84,835	98,551	91,614	275,000	0	0	0	0							
Revenue for Commission Tier 2	0	0	15,881	15,881	126,247	142,358	38,513	309,110							
Revenue for Commission Tier 3	0	0	0	0	0	0	157,266	157,266							
Commission % Tier 1 (Up to 50% of Annual Target)	5%	5%	5%	5%	5%	5%	5%	5%							
Commission % Tier 2 (50%-100% of Annual Target)	7%	7%	7%	7%	7%	7%	7%	7%							
Commission % Tier 3 (100%+ of Annual Target)	10%	10%	10%	10%	10%	10%	10%	10%							
Commission Tier 1	4,242	4,928	4,581	13,750	0	0	0	0							
Commission Tier 2	0	0	1,112	1,112	8,977	9,965	2,606	21,630							
Commission Tier 3	0	0	0	0	0	0	15,722	15,722							
Sales Promotion Incentive Fund (SPF)	0	0	0	0	600	900	100	(1,400)							
Commission	4,242	4,928	5,692	14,862	8,977	9,865	18,523	35,965							
Cumulative Commission	4,242	9,169	14,862	14,862	23,739	32,304	50,827	50,827							
Annual Commission Target	33,000	33,000	33,000	33,000	33,000	33,000	33,000	33,000							
Percent of Target Commission Achieved	12.85%	27.79%	45.04%	45.04%	70.42%	97.89%	154.02%	154.02%							
Version Flag	Actual	Actual	Actual		Forecast	Forecast	Forecast								

Current owner: Snelson

The only item available for adjustment in this tab is the *Sales Promotion Incentive Fund (SPIF)* associated with marketing and sales incentive programs. Note that on the *Version Flag* line, January through March are actual months, and April through December are forecast months. Therefore, the adjustments to the SPIF can only be made in the forecast months, and are the only cells with a white background, indicating that they are open for adjustment.

	Jan	Feb	Mar	Q1	Apr	May	Jun	Q2	Jul	
INDIVIDUAL INFORMATION										
Position	Sales Trainer	Sales Trainer	Sales Trainer		Sales Trainer	Sales Trainer	Sales Trainer			
Department	Southwest Sales	Southwest Sales	Southwest Sales		Southwest Sales	Southwest Sales	Southwest Sales			
Sales Plan	Sales Plan 2	Sales Plan 2	Sales Plan 2		Sales Plan 2	Sales Plan 2	Sales Plan 2			
REVENUE AND TARGET INFORMATION										
Revenue	84,835	90,551	107,496	290,881	126,247	142,358	155,779	416,385		
Revenue Adjustments	0	0	0	0	(50,000)	0	0	(50,000)		
Revenue for Commission Calc	84,835	90,551	107,496	290,881	76,247	142,358	155,779	416,385		
Cumulative Revenue	84,835	183,386	290,881	290,881	363,129	511,487	707,266	707,266		
Annual Revenue Target	550,000	550,000	550,000	550,000	550,000	550,000	550,000	550,000		
Percent of Annual Target Achieved	15.42%	33.34%	52.89%	52.89%	67.11%	93.00%	128.59%	128.59%		
Quarterly Revenue Target	165,000	165,000	165,000	165,000	300,000	165,000	165,000	165,000		
QTD Revenue	84,835	183,386	290,881	290,881	76,247	220,606	416,385	416,385		
Percent of Quarterly Target Achieved	84.83%	183.38%	290.88%	290.88%	78.25%	220.61%	416.38%	416.38%		
COMMISSION CALCULATION										
Revenue for Commission Tier 1	84,835	90,551	91,614	275,000	0	0	0	0		
Revenue for Commission Tier 2	0	0	15,881	15,881	128,247	142,358	38,513	309,110		
Revenue for Commission Tier 3	0	0	0	0	0	0	157,266	157,266		
Commission % Tier 1 (Up to 50% of Annual Target)	5%	5%	5%	5%	5%	5%	5%	5%		
Commission % Tier 2 (50%-100% of Annual Target)	7%	7%	7%	7%	7%	7%	7%	7%		
Commission % Tier 3 (100% of Annual Target)	10%	10%	10%	10%	10%	10%	10%	10%		
Commission Tier 1	4,242	4,928	4,581	13,750	0	0	0	0		
Commission Tier 2	0	0	1,112	1,112	8,977	9,965	2,606	21,630		
Commission Tier 3	0	0	0	0	0	0	15,722	15,722		
Sales Promotion Incentive Fund (SPIF)	0	0	0	0	0	0	0	0		
Commission	4,242	4,928	5,693	14,862	8,977	9,965	18,423	37,365		
Cumulative Commission	4,242	9,180	14,862	14,862	23,839	33,804	52,227	52,227		
Annual Commission Target	33,000	33,000	33,000	33,000	33,000	33,000	33,000	33,000		
Percent of Target Commission Achieved	12.85%	27.79%	45.04%	45.04%	72.24%	102.44%	158.26%	158.26%		
Version Flag	Actual	Actual	Actual		Forecast	Forecast	Forecast			

Individual Information		Revenue Exceptions		Commission Calc		Commission Summary		Customer Satisfaction		Bonus Calc		Sales Summary		Sandbox	
SCHUPPER, JESS		Current Forecast													
		Jan	Feb	Mar	Q1	Apr	May	Jun	Q2	Jul					
INDIVIDUAL INFORMATION															
Position	Sales Trainer	Sales Trainer	Sales Trainer	Sales Trainer		Sales Trainer	Sales Trainer	Sales Trainer							
Department	Southwest Sales	Southwest Sales	Southwest Sales	Southwest Sales		Southwest Sales	Southwest Sales	Southwest Sales							
Sales Plan	Sales Plan 2	Sales Plan 2	Sales Plan 2	Sales Plan 2		Sales Plan 2	Sales Plan 2	Sales Plan 2							
REVENUE AND TARGET INFORMATION															
Revenue	84,835	90,551	107,496	290,881	128,247	142,358	195,779	466,385							
Revenue Adjustments	0	0	0	0	0	0	0	0							
Revenue for Commission Calc	84,835	90,551	107,496	290,881	128,247	142,358	195,779	466,385							
Cumulative Revenue	84,835	183,386	290,881	290,881	369,129	511,487	707,266	707,266							
Annual Revenue Target	550,000	550,000	550,000	550,000	550,000	550,000	550,000	550,000							
Percent of Annual Target Achieved	15.42%	33.34%	52.89%	52.89%	67.11%	93.00%	128.59%	128.59%							
Quarterly Revenue Target	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000							
QTD Revenue	84,835	183,386	290,881	290,881	78,247	220,606	416,385	416,385							
Percent of Quarterly Target Achieved	84.83%	183.38%	290.88%	290.88%	78.25%	220.61%	416.38%	416.38%							
COMMISSION CALCULATION															
Revenue for Commission Tier 1	84,835	90,551	91,614	275,000	0	0	0	0							
Revenue for Commission Tier 2	0	0	15,881	15,881	128,247	142,358	38,513	389,110							
Revenue for Commission Tier 3	0	0	0	0	0	0	157,266	157,266							
Commission % Tier 1 (Up to 50% of Annual Target)	5%	5%	5%	5%	5%	5%	5%	5%							
Commission % Tier 2 (50%-100% of Annual Target)	7%	7%	7%	7%	7%	7%	7%	7%							
Commission % Tier 3 (100%+ of Annual Target)	10%	10%	10%	10%	10%	10%	10%	10%							
Commission Tier 1	4,242	4,928	4,581	13,750	0	0	0	0							
Commission Tier 2	0	0	1,112	1,112	9,977	9,965	2,606	21,638							
Commission Tier 3	0	0	0	0	0	0	15,727	15,727							
Sales Promotion Incentive Fund (SPIF)	0	0	0	0	0	0	0	0							
Commission	4,242	4,928	5,693	14,862	9,977	9,965	18,423	37,365							
Cumulative Commission	4,242	9,165	14,862	14,862	23,839	33,804	52,227	52,227							
Annual Commission Target	33,000	33,000	33,000	33,000	33,000	33,000	33,000	33,000							
Percent of Target Commission Achieved	12.85%	27.73%	45.04%	45.04%	72.24%	102.44%	158.26%	158.26%							
Version Flag	Actual	Actual	Actual		Forecast	Forecast	Forecast								

Current over: 36466

Individual Information		Revenue Exceptions		Commission Calc		Commission Summary		Customer Satisfaction		Bonus Calc		Sales Summary		Sandbox	
SCHUPPER, JESS		Current Forecast													
		Jan	Feb	Mar	Q1	Apr	May	Jun	Q2	Jul					
INDIVIDUAL INFORMATION															
Position	Sales Trainer	Sales Trainer	Sales Trainer	Sales Trainer		Sales Trainer	Sales Trainer	Sales Trainer							
Department	Southwest Sales	Southwest Sales	Southwest Sales	Southwest Sales		Southwest Sales	Southwest Sales	Southwest Sales							
Sales Plan	Sales Plan 2	Sales Plan 2	Sales Plan 2	Sales Plan 2		Sales Plan 2	Sales Plan 2	Sales Plan 2							
REVENUE AND TARGET INFORMATION															
Revenue	84,835	90,551	107,496	290,881	128,247	142,358	195,779	466,385							
Revenue Adjustments	0	0	0	0	0	0	0	0							
Revenue for Commission Calc	84,835	90,551	107,496	290,881	128,247	142,358	195,779	466,385							
Cumulative Revenue	84,835	183,386	290,881	290,881	369,129	511,487	707,266	707,266							
Annual Revenue Target	550,000	550,000	550,000	550,000	550,000	550,000	550,000	550,000							
Percent of Annual Target Achieved	15.42%	33.34%	52.89%	52.89%	67.11%	93.00%	128.59%	128.59%							
Quarterly Revenue Target	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000							
QTD Revenue	84,835	183,386	290,881	290,881	78,247	220,606	416,385	416,385							
Percent of Quarterly Target Achieved	84.83%	183.38%	290.88%	290.88%	78.25%	220.61%	416.38%	416.38%							
COMMISSION CALCULATION															
Revenue for Commission Tier 1	84,835	90,551	91,614	275,000	0	0	0	0							
Revenue for Commission Tier 2	0	0	15,881	15,881	128,247	142,358	38,513	389,110							
Revenue for Commission Tier 3	0	0	0	0	0	0	157,266	157,266							
Commission % Tier 1 (Up to 50% of Annual Target)	5%	5%	5%	5%	5%	5%	5%	5%							
Commission % Tier 2 (50%-100% of Annual Target)	7%	7%	7%	7%	7%	7%	7%	7%							
Commission % Tier 3 (100%+ of Annual Target)	10%	10%	10%	10%	10%	10%	10%	10%							
Commission Tier 1	4,242	4,928	4,581	13,750	0	0	0	0							
Commission Tier 2	0	0	1,112	1,112	9,977	9,965	2,606	21,638							
Commission Tier 3	0	0	0	0	0	0	15,727	15,727							
Sales Promotion Incentive Fund (SPIF)	0	0	0	0	0	0	0	0							
Commission	4,242	4,928	5,693	14,862	9,977	9,965	18,423	37,365							
Cumulative Commission	4,242	9,165	14,862	14,862	23,839	33,804	52,227	52,227							
Annual Commission Target	33,000	33,000	33,000	33,000	33,000	33,000	33,000	33,000							
Percent of Target Commission Achieved	12.85%	27.73%	45.04%	45.04%	72.24%	102.24%	158.57%	158.57%							
Version Flag	Actual	Actual	Actual		Forecast	Forecast	Forecast								

Current over: 36466

The *Commission Summary* tab is linked from the *Commission Calc* tab and provides a high level view of anticipated commission payouts, as well as a comparison to the previous forecast, plan, and prior-year actuals.

Individual Information Revenue Exceptions Commission Calc Commission Summary Customer Satisfaction Bonus Calc Salary Summary Sandbox				
SCHIPPER, JESS				
COMMISSION SUMMARY	Current Forecast	Previous Forecast	Current Year Plan	Prior Year Actuals
Commission Tier 1	13,750	13,750	13,750	13,750
Commission Tier 2	22,750	19,250	19,250	19,250
Commission Tier 3	104,164	101,891	101,891	101,891
Sales Promotion Incentive Fund (SPIF)	100	0	0	0
Commission	140,764	134,891	134,891	134,891
Annual Commission Target	33,000	33,000	33,000	33,000
Percent of Target Commission Achieved	426.56%	408.76%	408.76%	408.76%

The *Customer Satisfaction* tab provides customer information to the sales representative and is used to calculate the bonus. Information about the number of customers and the average customer satisfaction ratings are fed from sales forecasting and customer management tools. This tab provides information about the number of customers that the sales representative is responsible for managing, the number of customers lost to competitors, and the number of new customers added that month. The closing customer balance is then fed to the next month to provide a starting point.

Individual Information Revenue Exceptions Commission Calc Commission Summary Customer Satisfaction Bonus Calc Salary Summary Sandbox														
SCHIPPER, JESS														
Current Forecast														
CUSTOMER SATISFACTION	Jan	Feb	Mar	Q1	Apr	May	Jun	Q2	Jul	Aug	Sep	Q3	Oct	Nov
Existing Customers	10	10	8	28	9	9	9	27	9	10	8	27	8	8
Customers Lost to Competitors	0	3	0	2	0	1	0	1	0	2	0	2	0	0
Percent of Customers Lost	0.00%	20.00%	0.00%	6.67%	0.00%	11.11%	0.00%	3.70%	0.00%	20.00%	0.00%	6.67%	0.00%	0.00%
New Customers Added	0	0	1	1	0	1	0	1	1	0	0	1	0	0
Total Customers	10	8	9	27	9	9	9	27	10	8	8	26	8	8
Average Customer Satisfaction Rating	4.0	4.5	4.0	4.2	4.4	4.0	4.5	4.3	4.0	4.5	4.5	4.3	4.5	4.5
Version Flag	Actual	Actual	Actual	Forecast	Forecast	Forecast	Forecast	Forecast	Forecast	Forecast	Forecast	Forecast	Forecast	Forecast

The *Percent of Customers Lost* and the *Average Customer Satisfaction Rating* are linked into the *Bonus Calc* tab. The *Bonus Calc* tab is used to determine whether the sales representative is eligible for the monthly bonus. In this model, the percentage of lost customers must be less than 5 percent, and the *Average Customer Satisfaction Rating* must be 4 or greater.

Individual Information Revenue Exceptions Commission Calc Commission Summary Customer Satisfaction Bonus Calc Salary Summary Sandbox										
SCHIPPER, JESS										
Current Forecast										
INDIVIDUAL INFORMATION	Jan	Feb	Mar	Q1	Apr	May	Jun	Q2	Jul	Nov
Position	Sales Trainee	Sales Trainee	Sales Trainee		Sales Trainee	Sales Trainee	Sales Trainee		Sales Trainee	Sales Trainee
Department	Southeast Sales	Southeast Sales	Southeast Sales		Southeast Sales	Southeast Sales	Southeast Sales		Southeast Sales	Southeast Sales
Sales Plan	Sales Plan 2	Sales Plan 2	Sales Plan 2		Sales Plan 2	Sales Plan 2	Sales Plan 2		Sales Plan 2	Sales Plan 2
BONUS CALCULATION										
Percent of Customers Lost	0.00%	20.00%	0.00%	6.67%	0.00%	11.11%	0.00%	3.70%	0.00%	0.00%
Average Customer Satisfaction Rating	4.0	4.5	4.0	4.2	4.4	4.0	4.5	4.3	4.0	4.0
Bonus Achievement?	Y	N	Y	Y	Y	N	Y	Y	Y	Y
Monthly Bonus Amount	1,000	1,000	1,000	3,000	1,000	1,000	1,000	3,000	1,000	1,000
Bonus	1,000	1,000	2,000	3,000	3,000	3,000	3,000	3,000	3,000	3,000
Cumulative Bonus	1,000	2,000	5,000	8,000	11,000	14,000	17,000	20,000	23,000	26,000
Version Flag	Actual	Actual	Actual	Forecast	Forecast	Forecast	Forecast	Forecast	Forecast	Forecast

The *Monthly Bonus Amount* is linked from the *Salary Components Matrix* tab, and is paid only when the conditions listed above are met.

	Jan	Feb	Mar	Q1	Apr	May	Jun	Q2	Jul	Aug
INDIVIDUAL INFORMATION										
Position	Sales Trainee	Sales Trainee	Sales Trainee		Sales Trainee	Sales Trainee	Sales Trainee		Sales Trainee	
Department	Southwest Sales	Southwest Sales	Southwest Sales		Southwest Sales	Southwest Sales	Southwest Sales		Southwest Sales	
Sales Plan	Sales Plan 2	Sales Plan 2	Sales Plan 2		Sales Plan 2	Sales Plan 2	Sales Plan 2		Sales Plan 2	
BONUS CALCULATION										
Percent of Customers List	0.00%	20.00%	0.00%	6.67%	0.00%	11.11%	0.00%	3.70%	0.00%	
Average Customer Satisfaction Rating	4.0	4.5	4.0	4.2	4.4	4.0	4.5	4.3	4.0	
Bonus Achievement?	Y	N	Y		Y	N	Y		Y	
Monthly Bonus Amount	1,000	1,000	1,000	3,000	1,000	1,000	1,000	3,000	1,000	
Bonus	1,000	0	1,000	2,000	1,000	0	1,000	2,000	1,000	
Cumulative Bonus	1,000	1,000	2,000	2,000	3,000	3,000	4,000	4,000	5,000	
Version Flag	Actual	Actual	Actual		Forecast	Forecast	Forecast		Forecast	

The *Salary Summary* tab provides information about all the components of sales compensation for each sales representative. *Monthly Base Salary* is linked from the *Salary Components Matrix* tab. *Commission* is linked from the *Commission Calc* tab. *Bonus* is linked from the *Bonus Calc* tab.

The *Salary Summary* tab also allows a draw to be provided to sales representatives. In this *Blueprint*, the sales representative is eligible for a draw if his/her position type is Sales Trainee. The draw is available for six months. There are two types of draw: *Recoverable Draw* and *Minimum Guarantee Draw*. *Recoverable Draw* must be paid back to the company, while the *Minimum Guarantee Draw* does not. Any commissions earned in the months when the employee is eligible for the draw offset the *Minimum Guarantee Draw* first, then offset the *Recoverable Draw*.

	Jan	Feb	Mar	Q1	Apr	May	Jun	Q2	Jul	Aug	Sep	Q3	Oct	Nov
SALES COMPENSATION														
Monthly Base Salary	2,500	2,500	2,500	7,500	2,500	2,500	2,500	7,500	2,500	2,500	2,500	7,500	2,500	2,500
Commission	0	1,000	2,000	3,000	3,000	4,000	5,000	12,000	6,000	7,000	8,000	21,000	9,000	10,000
Recoverable Draw	1,250	1,250	500	3,000	(500)	(1,500)	(1,000)	(3,000)	0	0	0	0	0	0
Minimum Guarantee Draw	1,250	250	0	1,500	0	0	0	0	0	0	0	0	0	0
Bonus	1,000	0	1,000	2,000	1,000	0	1,000	2,000	1,000	0	1,000	2,000	1,000	1,000
Total Sales Compensation	6,000	5,000	6,000	17,000	6,000	5,000	7,500	18,500	9,500	9,500	11,500	30,500	12,500	13,500
Cumulative Sales Compensation	6,000	11,000	17,000	17,000	23,000	28,000	35,500	35,500	45,000	54,500	66,000	66,000	78,500	92,000
DRAW CALCULATION														
Recoverable Draw Allowed	1,250	1,250	1,250	3,750	1,250	1,250	1,250	3,750	0	0	0	0	0	0
Minimum Guarantee Draw Allowed	1,250	1,250	1,250	3,750	1,250	1,250	1,250	3,750	0	0	0	0	0	0
Version Flag	Actual	Actual	Actual		Forecast	Forecast	Forecast		Forecast	Forecast	Forecast		Forecast	Forecast

SANDBOX

A *Sandbox* tab is provided for sales representatives to do *what-if* analyses based on modifications to revenue forecasts. These revenue modifications will recalculate the sales compensation projections in the *Sandbox* tab. All information is linked from previous tabs, and the sales representative is given three scenarios to perform *what-if* calculations. The results from these scenarios are not used anywhere else in the model.

	Jan	Feb	Mar	Q1	Apr	May	Jun	Q2	Jul
INDIVIDUAL INFORMATION									
Position	Sales Trainee	Sales Trainee	Sales Trainee		Sales Trainee	Sales Trainee	Sales Trainee		
Department	Southwest Sales	Southwest Sales	Southwest Sales		Southwest Sales	Southwest Sales	Southwest Sales		
Sales Plan	Sales Plan 2	Sales Plan 2	Sales Plan 2		Sales Plan 2	Sales Plan 2	Sales Plan 2		
COMMISSION CALCULATION									
Revenue	84,835	98,561	107,496	290,881	128,247	142,358	195,779	466,385	
Adjustment	0	0	0	0	0	0	0	0	
Adjusted Revenue	84,835	98,561	107,496	290,881	128,247	142,358	195,779	466,385	
Cumulative Revenue	84,835	183,386	290,881	290,881	419,129	561,487	757,266	757,266	
Annual Revenue Target	550,000	550,000	550,000	550,000	550,000	550,000	550,000	550,000	
Percent of Annual Target Achieved	15.42%	33.34%	52.89%	101.65%	76.21%	102.09%	137.68%	315.98%	
Revenue for Commission Tier 1	84,835	98,561	91,614	275,000	0	0	0	0	
Revenue for Commission Tier 2	0	0	15,881	15,881	128,247	130,871	0	259,119	
Revenue for Commission Tier 3	0	0	0	0	0	11,487	195,779	207,266	
Commission % Tier 1 (up to 50% of Annual Target)	5%	5%	5%	5%	5%	5%	5%	5%	
Commission % Tier 2 (50%-100% of Annual Target)	7%	7%	7%	7%	7%	7%	7%	7%	
Commission % Tier 3 (100%+ of Annual Target)	10%	10%	10%	10%	10%	10%	10%	10%	
Commission Tier 1	4,242	4,928	4,581	4,581	0	0	0	0	
Commission Tier 2	0	0	1,112	1,112	8,977	9,161	0	18,138	
Commission Tier 3	0	0	0	0	0	1,149	19,578	20,727	
Sales Promotion Incentive Fund (SPIF)	0	0	0	0	100	0	0	100	
Commission Earned - Forecast	4,242	4,928	5,692	14,862	9,077	10,310	19,578	38,965	
Cumulative Commission Earned	4,242	9,169	14,862	14,862	23,939	34,249	53,827	53,827	
Annual Commission Target	33,000	33,000	33,000	33,000	33,000	33,000	33,000	33,000	
Percent of Target Commission Achieved	12.85%	27.79%	45.04%	45.04%	72.54%	103.78%	163.11%	163.11%	
BONUS CALCULATION									
Existing Customers	10	10	8	29	3	9	9	27	
Customers Lost to Competitors	0	2	0	2	0	1	0	1	
Percent of Customers Lost	0.00%	20.00%	0.00%	6.67%	0.00%	11.11%	0.00%	3.70%	
New Customers Added	0	0	1	1	0	1	0	1	
Total Customers	10	8	9	27	9	9	9	27	
Average Customer Satisfaction Rating	4.0	4.5	4.0	4.2	4.4	4.0	4.5	4.3	
Bonus Achievement?	Y	N	Y	Y	Y	N	Y	Y	
Monthly Bonus Amount	1,000	1,000	1,000	3,900	1,000	1,000	1,000	3,900	

Current scenario: baseline

		Customer Satisfaction	Bonus Calc	Salary Summary	Sandbox	Sales Plan Matrix	Salary Components Matrix	Commission Components Matrix			
Version 1		SCHIFFER, JESS									
		Jan	Feb	Mar	Q1	Apr	May	Jun	Q2	Jul	Aug
INDIVIDUAL INFORMATION											
Position		Sales Trainee	Sales Trainee	Sales Trainee		Sales Trainee	Sales Trainee	Sales Trainee			
Department		Southwest Sales	Southwest Sales	Southwest Sales		Southwest Sales	Southwest Sales	Southwest Sales			
Sales Plan		Sales Plan 2	Sales Plan 2	Sales Plan 2		Sales Plan 2	Sales Plan 2	Sales Plan 2			
COMMISSION CALCULATION											
Revenue		84,835	98,551	107,496	290,881	128,247	142,350	195,779	466,385		
Adjustment		0	0	0	0	25,000	0	0	0		
Adjusted Revenue		84,835	98,551	107,496	290,881	128,247	142,350	195,779	466,385		
Cumulative Revenue		84,835	183,386	290,881	290,881	419,129	561,487	757,266	757,266		
Annual Revenue Target		550,000	550,000	550,000	550,000	550,000	550,000	550,000	550,000		
Percent of Annual Target Achieved		15.42%	33.34%	52.89%	101.65%	76.21%	102.09%	137.68%	315.98%		
Revenue for Commission Tier 1		84,835	98,551	91,614	275,000	0	0	0	0		
Revenue for Commission Tier 2		0	0	15,881	15,881	128,247	130,871	0	259,119		
Revenue for Commission Tier 3		0	0	0	0	0	11,487	195,779	207,266		
Commission % Tier 1 (Up to 50% of Annual Target)		5%	5%	5%	5%	5%	5%	5%	5%		
Commission % Tier 2 (50%-100% of Annual Target)		7%	7%	7%	7%	7%	7%	7%	7%		
Commission % Tier 3 (100%+ of Annual Target)		10%	10%	10%	10%	10%	10%	10%	10%		
Commission Tier 1		4,242	4,928	4,581	4,581	0	0	0	0		
Commission Tier 2		0	0	1,112	1,112	8,977	9,161	0	18,138		
Commission Tier 3		0	0	0	0	0	1,149	19,578	20,727		
Sales Promotion Incentive Fund (SPIF)		0	0	0	0	100	0	0	100		
Commission Earned - Forecast		4,242	4,928	5,692	14,862	9,077	10,310	19,578	38,965		
Cumulative Commission Earned		4,242	9,169	14,862	14,862	23,939	34,249	53,827	53,827		
Annual Commission Target		33,000	33,000	33,000	33,000	33,000	33,000	33,000	33,000		
Percent of Target Commission Achieved		12.85%	27.79%	45.04%	45.04%	72.54%	103.78%	163.11%	163.11%		
BONUS CALCULATION											
Existing Customers		10	10	8	28	3	9	3	27		
Customers Lost to Competitors		0	2	0	2	0	1	0	1		
Percent of Customers Lost		0.00%	20.00%	0.00%	6.67%	0.00%	11.11%	0.00%	3.70%		
New Customers Added		0	0	1	1	0	1	0	1		
Total Customers		10	8	9	27	3	9	3	27		
Average Customer Satisfaction Rating		4.0	4.5	4.0	4.2	4.4	4.0	4.5	4.3		
Bonus Achievement?		Y	N	Y	Y	Y	N	Y	Y		
Monthly Bonus Amount		1,000	1,000	1,000	3,000	1,000	1,000	1,000	3,000		

Current owner: Jessifer

		Customer Satisfaction	Bonus Calc	Salary Summary	Sandbox	Sales Plan Matrix	Salary Components Matrix	Commission Components Matrix			
Version 1		SCHIFFER, JESS									
		Jan	Feb	Mar	Q1	Apr	May	Jun	Q2	Jul	Aug
INDIVIDUAL INFORMATION											
Position		Sales Trainee	Sales Trainee	Sales Trainee		Sales Trainee	Sales Trainee	Sales Trainee			
Department		Southwest Sales	Southwest Sales	Southwest Sales		Southwest Sales	Southwest Sales	Southwest Sales			
Sales Plan		Sales Plan 2	Sales Plan 2	Sales Plan 2		Sales Plan 2	Sales Plan 2	Sales Plan 2			
COMMISSION CALCULATION											
Revenue		84,835	98,551	107,496	290,881	128,247	142,350	195,779	466,385		
Adjustment		0	0	0	0	25,000	0	0	25,000		
Adjusted Revenue		84,835	98,551	107,496	290,881	153,247	142,350	195,779	491,385		
Cumulative Revenue		84,835	183,386	290,881	290,881	444,129	586,487	782,266	782,266		
Annual Revenue Target		550,000	550,000	550,000	550,000	550,000	550,000	550,000	550,000		
Percent of Annual Target Achieved		15.42%	33.34%	52.89%	101.65%	80.75%	106.63%	142.23%	329.61%		
Revenue for Commission Tier 1		84,835	98,551	91,614	275,000	0	0	0	0		
Revenue for Commission Tier 2		0	0	15,881	15,881	153,247	105,871	0	259,119		
Revenue for Commission Tier 3		0	0	0	0	0	36,487	195,779	232,266		
Commission % Tier 1 (Up to 50% of Annual Target)		5%	5%	5%	5%	5%	5%	5%	5%		
Commission % Tier 2 (50%-100% of Annual Target)		7%	7%	7%	7%	7%	7%	7%	7%		
Commission % Tier 3 (100%+ of Annual Target)		10%	10%	10%	10%	10%	10%	10%	10%		
Commission Tier 1		4,242	4,928	4,581	4,581	0	0	0	0		
Commission Tier 2		0	0	1,112	1,112	10,727	7,411	0	18,138		
Commission Tier 3		0	0	0	0	0	3,649	19,578	23,227		
Sales Promotion Incentive Fund (SPIF)		0	0	0	0	100	0	0	100		
Commission Earned - Forecast		4,242	4,928	5,692	14,862	10,827	11,060	19,578	41,465		
Cumulative Commission Earned		4,242	9,169	14,862	14,862	25,689	36,749	56,327	56,327		
Annual Commission Target		33,000	33,000	33,000	33,000	33,000	33,000	33,000	33,000		
Percent of Target Commission Achieved		12.85%	27.79%	45.04%	45.04%	77.85%	111.36%	170.69%	170.69%		
BONUS CALCULATION											
Existing Customers		10	10	8	28	3	9	3	27		
Customers Lost to Competitors		0	2	0	2	0	1	0	1		
Percent of Customers Lost		0.00%	20.00%	0.00%	6.67%	0.00%	11.11%	0.00%	3.70%		
New Customers Added		0	0	1	1	0	1	0	1		
Total Customers		10	8	9	27	3	9	3	27		
Average Customer Satisfaction Rating		4.0	4.5	4.0	4.2	4.4	4.0	4.5	4.3		
Bonus Achievement?		Y	N	Y	Y	Y	N	Y	Y		
Monthly Bonus Amount		1,000	1,000	1,000	3,000	1,000	1,000	1,000	3,000		

Current owner: Jessifer

Customer Satisfaction		Bonus Calc		Salary Summary		Sandbox		Sales Plan Matrix		Salary Components Matrix		Commission Components Matrix	
Version 1		SCHIFFER, JESS											
Version 1		Jan	Feb	Mar	Q1	Apr	May	Jun	Q2	Jul			
Version 2													
Version 3													
Department		Sales Trainee	Sales Trainee	Sales Trainee		Sales Trainee	Sales Trainee	Sales Trainee					
Sales Plan		Southwest Sales	Southwest Sales	Southwest Sales		Southwest Sales	Southwest Sales	Southwest Sales					
Sales Plan		Sales Plan 2	Sales Plan 2	Sales Plan 2		Sales Plan 2	Sales Plan 2	Sales Plan 2					
COMMISSION CALCULATION													
Revenue		84,835	98,561	107,496	290,881	129,247	142,350	155,779	466,385				
Adjustment		0	0	0	0	25,000	0	0	25,000				
Adjusted Revenue		84,835	98,561	107,496	290,881	153,247	142,350	155,779	491,385				
Cumulative Revenue		84,835	183,386	290,881	290,881	444,129	586,487	742,266	782,266				
Annual Revenue Target		550,000	550,000	550,000	550,000	550,000	550,000	550,000	550,000	550,000			
Percent of Annual Target Achieved		15.42%	33.34%	52.89%	101.65%	80.75%	106.63%	142.23%	329.61%				
Revenue for Commission Tier 1		84,835	98,561	91,614	279,000	0	0	0	0				
Revenue for Commission Tier 2		0	0	15,881	15,881	153,247	105,671	0	259,119				
Revenue for Commission Tier 3		0	0	0	0	0	36,487	195,779	232,266				
Commission % Tier 1 (Up to 50% of Annual Target)		5%	5%	5%	5%	5%	5%	5%	5%				
Commission % Tier 2 (50%-100% of Annual Target)		7%	7%	7%	7%	7%	7%	7%	7%				
Commission % Tier 3 (100%+ of Annual Target)		10%	10%	10%	10%	10%	10%	10%	10%				
Commission Tier 1		4,242	4,928	4,581	4,581	0	0	0	0				
Commission Tier 2		0	0	1,112	1,112	10,727	7,411	0	18,138				
Commission Tier 3		0	0	0	0	0	3,649	19,578	23,227				
Sales Promotion Incentive Fund (SPIF)		0	0	0	0	0	100	0	100				
Commission Earned - Forecast		4,242	4,928	5,692	14,862	10,827	11,060	19,578	41,465				
Cumulative Commission Earned		4,242	9,169	14,862	14,862	25,689	36,749	56,327	56,327				
Annual Commission Target		33,000	33,000	33,000	33,000	33,000	33,000	33,000	33,000				
Percent of Target Commission Achieved		12.85%	27.79%	45.04%	45.04%	77.85%	111.36%	170.69%	170.69%				
BONUS CALCULATION													
Existing Customers		10	10	8	28	3	9	3	27				
Customers Lost to Competitors		0	2	0	2	0	1	0	1				
Percent of Customers Lost		0.00%	20.00%	0.00%	6.67%	0.00%	11.11%	0.00%	3.70%				
New Customers Added		0	0	1	1	0	1	0	1				
Total Customers		10	8	9	27	3	9	3	27				
Average Customer Satisfaction Rating		4.0	4.5	4.0	4.2	4.4	4.0	4.5	4.3				
Bonus Achievement?		Y	N	Y	Y	Y	N	Y	Y				
Monthly Bonus Amount		1,000	1,000	1,000	3,000	1,000	1,000	1,000	3,000				

Current owner: Jessifer

ASSUMPTIONS

The *Sales Plan Matrix* tab provides information about the sales plan each sales representative participates in based upon the position and the department.

Customer Satisfaction	Bonus Calc	Salary Summary	Sandbox	Sales Plan Matrix	Salary Components Matrix	Commission Components Matrix	
Sales Plan							
	Northwest Sales	Southeast Sales	Midwest Sales	Northwest Sales	Southwest Sales	UK Sales	
Sales Trainee	Sales Plan 1	Sales Plan 1	Sales Plan 1	Sales Plan 2	Sales Plan 2	Sales Plan 2	
Sales Representative	Sales Plan 1	Sales Plan 1	Sales Plan 1	Sales Plan 2	Sales Plan 2	Sales Plan 2	
Senior Sales Representative	Sales Plan 3	Sales Plan 3	Sales Plan 3	Sales Plan 4	Sales Plan 4	Sales Plan 4	
National Accounts Manager	Sales Plan 5	Sales Plan 5	Sales Plan 5	Sales Plan 5	Sales Plan 5	Sales Plan 5	

The *Salary Components Matrix* tab provides information such as base salary, bonus amount, and draw amounts based upon the sales plan and the position.

Customer Satisfaction	Bonus Calc	Salary Summary	Sandbox	Sales Plan Matrix	Salary Components Matrix	Commission Components Matrix	
Sales Trainee							
	Sales Plan 1	Sales Plan 2	Sales Plan 3	Sales Plan 4	Sales Plan 5		
SALARY COMPONENTS							
Annual Base Salary	30,000	30,000	36,000	36,000	36,000		
Monthly Base Salary	2,500	2,500	3,000	3,000	3,000		
Monthly Bonus Amount	1,000	1,000	1,000	1,000	1,000		
Monthly Recoverable Draw	1,250	1,250	1,500	1,500	1,500		
Monthly Minimum Guarantee Draw	1,250	1,250	1,500	1,500	1,500		

Customer Satisfaction	Bonus Calc	Salary Summary	Sandbox	Sales Plan Matrix	Salary Components Matrix	Commission Components Matrix	
Sales Trainee							
Sales Trainee	Sales Plan 1	Sales Plan 2	Sales Plan 3	Sales Plan 4	Sales Plan 5		
Sales Representative							
Senior Sales Representative	30,000	30,000	36,000	36,000	36,000		
National Accounts Manager	2,500	2,500	3,000	3,000	3,000		
Monthly Bonus Amount	1,000	1,000	1,000	1,000	1,000		
Monthly Recoverable Draw	1,250	1,250	1,500	1,500	1,500		
Monthly Minimum Guarantee Draw	1,250	1,250	1,500	1,500	1,500		

Customer Satisfaction	Bonus Calc	Salary Summary	Sandbox	Sales Plan Matrix	Salary Components Matrix	Commission Components Matrix	
Sales Representative							
	Sales Plan 1	Sales Plan 2	Sales Plan 3	Sales Plan 4	Sales Plan 5		
SALARY COMPONENTS							
Annual Base Salary	36,000	36,000	42,000	42,000	42,000		
Monthly Base Salary	3,000	3,000	3,500	3,500	3,500		
Monthly Bonus Amount	1,100	1,100	1,100	1,100	1,100		
Monthly Recoverable Draw	0	0	0	0	0		
Monthly Minimum Guarantee Draw	0	0	0	0	0		

The *Commission Components Matrix* tab provides the revenue targets and the commission percentages by sales plan and by position.

Customer Satisfaction | Bonus Calc | Salary Summary | Sandbox | Sales Plan Matrix | Salary Components Matrix | **Commission Components Matrix**

Sales Trainee

	Sales Plan 1	Sales Plan 2	Sales Plan 3	Sales Plan 4	Sales Plan 5
REVENUE TARGETS					
Quarter 1 Revenue Target	100,000	100,000	100,000	100,000	100,000
Quarter 2 Revenue Target	100,000	100,000	100,000	100,000	100,000
Quarter 3 Revenue Target	150,000	150,000	150,000	150,000	150,000
Quarter 4 Revenue Target	200,000	200,000	200,000	200,000	200,000
Annual Revenue Target	550,000	550,000	550,000	550,000	550,000
COMMISSION COMPONENTS					
Revenue Threshold 1	275,000	275,000	275,000	275,000	275,000
Commission % Tier 1 (up to 50% of Annual Target)	5%	5%	5%	6%	7%
Commission % Tier 2 (50%-100% of Annual Target)	7%	7%	7%	8%	9%
Commission % Tier 3 (100%+ of Annual Target)	10%	10%	10%	10%	10%
Annual Commission Target	33,000	33,000	33,000	38,500	44,000

Customer Satisfaction | Bonus Calc | Salary Summary | Sandbox | Sales Plan Matrix | Salary Components Matrix | **Commission Components Matrix**

Sales Trainee

	Sales Plan 1	Sales Plan 2	Sales Plan 3	Sales Plan 4	Sales Plan 5
REVENUE TARGETS					
Quarter 1 Revenue Target	100,000	100,000	100,000	100,000	100,000
Quarter 2 Revenue Target	100,000	100,000	100,000	100,000	100,000
Quarter 3 Revenue Target	150,000	150,000	150,000	150,000	150,000
Quarter 4 Revenue Target	200,000	200,000	200,000	200,000	200,000
Annual Revenue Target	550,000	550,000	550,000	550,000	550,000
COMMISSION COMPONENTS					
Revenue Threshold 1	275,000	275,000	275,000	275,000	275,000
Commission % Tier 1 (up to 50% of Annual Target)	5%	5%	5%	6%	7%
Commission % Tier 2 (50%-100% of Annual Target)	7%	7%	7%	8%	9%
Commission % Tier 3 (100%+ of Annual Target)	10%	10%	10%	10%	10%
Annual Commission Target	33,000	33,000	33,000	38,500	44,000

Customer Satisfaction | Bonus Calc | Salary Summary | Sandbox | Sales Plan Matrix | Salary Components Matrix | **Commission Components Matrix**

Sales Representative

	Sales Plan 1	Sales Plan 2	Sales Plan 3	Sales Plan 4	Sales Plan 5
REVENUE TARGETS					
Quarter 1 Revenue Target	125,000	125,000	125,000	125,000	125,000
Quarter 2 Revenue Target	150,000	150,000	150,000	150,000	150,000
Quarter 3 Revenue Target	200,000	200,000	200,000	200,000	200,000
Quarter 4 Revenue Target	275,000	275,000	275,000	275,000	275,000
Annual Revenue Target	750,000	750,000	750,000	750,000	750,000
COMMISSION COMPONENTS					
Revenue Threshold 1	375,000	375,000	375,000	375,000	375,000
Commission % Tier 1 (up to 50% of Annual Target)	6%	6%	6%	7%	8%
Commission % Tier 2 (50%-100% of Annual Target)	8%	8%	8%	8%	9%
Commission % Tier 3 (100%+ of Annual Target)	11%	11%	11%	11%	11%
Annual Commission Target	52,500	52,500	52,500	56,250	63,750

**ABOUT THE COGNOS INNOVATION CENTER
FOR PERFORMANCE MANAGEMENT**

The Cognos Innovation Center is dedicated to transforming routine performance management practices into “next practices” that help cut costs, minimize risk, streamline processes, boost productivity, enable rapid response to opportunity, and increase management visibility.