

Solution Guide: ICM Volume 3 – Reporting and Collaboration



Anaplan

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Incentive Compensation Management (ICM) – Reporting and Collaboration

Foreword

Every sales strategy aims to answer three questions:

- **Where should we sell?** *Sales planning that defines our universe—territories, quotas, account segments, and sales capacities, the building blocks of the sales strategy.*
- **How should we sell?** *Sales incentive programs inspiring the right behaviors that drive sellers to the results we need.*
- **What should we sell?** *Sales insights that determine the things we need to do to increase sales performance.*

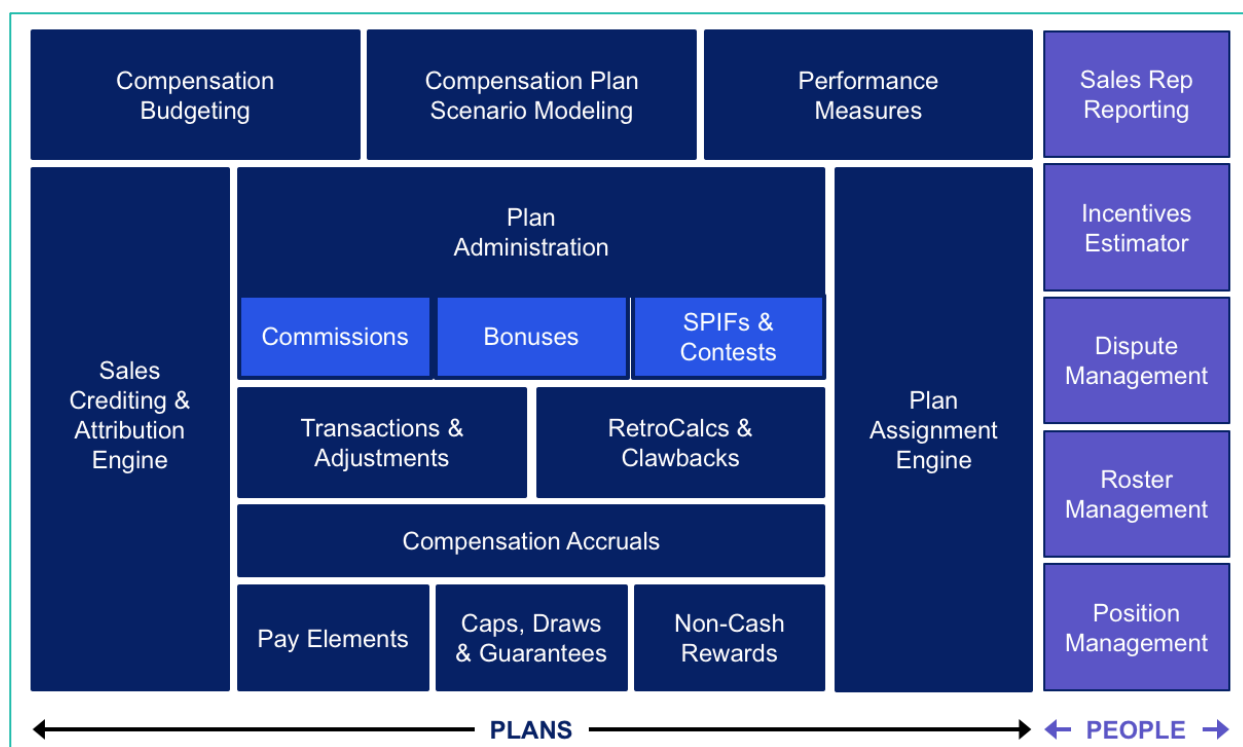
There are many processes within the incentive compensation function. Some processes are task oriented such as researching disputes, and others are typically driven by workflow such as compensation plan approval. Almost all require dashboards, reports, and collaboration. This guide covers the following collaboration processes and dashboards:

- New hire on-boarding
- Compensation plan approval and acceptance
- Dispute management
- Payment approvals
- Sales rep metrics and dashboards
- Sales rep commission estimator
- Sales manager/leader team metrics & dashboards
- Compensation Administrator and Analyst dashboards

This is the third solution guide for the Incentives and Rewards Solution, Anaplan's incentive compensation management solution. See the following solution guides for additional detailed functional and technical information:

[Incentive Compensation Management \(ICM\) Volume I: Sales Crediting](#)

[Incentive Compensation Management \(ICM\) Volume II: Compensation Rules and Design](#)



Scope of Anaplan Incentives and Rewards (ICM)

An automated incentive compensation solution and automated processes ultimately lead to greater attainment and payment accuracy and less disputes, leaving sales reps more time to sell. It also allows organizations to easily model different scenarios and quickly bring new strategies into production.

This guide provides best practices, sample reports and dashboards, and workflow used to manage common processes, along with common incentive compensation metrics used to answer the second question of the sales strategy, “How should we sell?”. The following represents Anaplan’s point of view on variable compensation best practices based on industry-leading research and customer experience.

New hire on-boarding

When initially implementing an automated incentive compensation solution all payees are imported into the application and assigned to compensation plans. However, there are additional tasks that often need to be performed when new salespeople are hired prior to and after go-live. Here are the typical steps that need to happen prior to a salesperson being paid:

- The new hire is imported or created
- A compensation role is assigned to the new hire
- A commission plan is assigned, typically based on the compensation role
 - Territory(s) is assigned
 - Quota pro-ratio rules may or may not be applied
- A Compensation Analyst reviews the new hire's compensation plan and plan detail
 - Compensation Plan rules may need to be overridden at the payee level. For example, quota is imported or manually adjusted; commission rates are individualized, etc.
- The compensation plan is sent to the salesperson's manager for review and approval
- The approved plan is sent to the salesperson for acceptance and signature

The best-case scenario is when all the above steps are automated. However, it may not always be possible to automate the entire flow because at times human intervention is required.

On-boarding steps can be automated and combined into one or more "jobs" by creating a "Process" action within Anaplan. First create a mapping between sales job codes, if importing payee data from HR, and compensation roles. When importing payees from CRM, then you may not have access to payee job codes but will have access their sales role to use for mapping. During the import process, the compensation role can be assigned to the salesperson using job code or sales role. A process step can be created to perform the assignment based on mapping logic. Another step can be included to perform the compensation plan assignment to the new salesperson once the role assignment step is completed.

If there are consistent business rules regarding quota pro-ratio for new hires, these rules can be added to the quota import or applied to compensation plan components.

Once compensation plan assignment takes place, it's typical for compensation analysts to review the assignment, quota, target incentive (if any), etc. relevant for the payee's compensation plan. Plan details may need to be edited prior to sending it out for approval. Actions should be created to manage publishing compensation plans and sending approval notifications. Anaplan customers generally use the DocuSign plug-in integration for compensation plan approval management.

Sales Compensation Jobs / Roles and Plan Eligibility

Sales compensation plans are designed around sales jobs and the role salespeople play in selling as well as how they sell. This is one reason why you often see compensation plans associated to roles in sales incentive applications; plan components and measures are most often calculated in the same way for salespeople assigned to these categories of roles.

Typically, many sales jobs can be mapped to a single plan within your solution. Rate tiers and tier boundaries are often static across multiple jobs. Quota/targets and target incentive are used for the varying piece to calculate payments using more static rate tables. Alternatively, plan structures and quota might be the same across sales jobs, but commission rates may vary for each individual. To minimize compensation plan maintenance, create and use the same underlying structures where possible, and override quota, target incentive, and or commission rates at the participant-plan component level.

Create or leverage rules to assign compensation plans to payees based on current role assignment to those sales reps. Assignment start date should be based on the intersection of the compensation plan start date and the role assignment start date, whichever is later.

Attributes that can often be leveraged for compensation plan assignments are as follows:

- Compensation Role
 - Assign a compensation role to salespeople based on their HR Job, or CRM Role using mapping during participant import
 - Use the compensation role to map to compensation plan assignments
- Country
 - Quite often compensation plan structure and terms may differ based on the sales rep's country or theatre such as AMER, EMEA, APAC
- Department
 - If available and importing from an HR application department might be helpful in identifying the compensation role category
- Variable Compensation Plan
 - Occasionally this attribute is added to the HR Solution and can be leveraged for assignments in the Incentive Compensation solution

Sales Jobs can be sorted into common categories. HR sales jobs are often much more granular than compensation roles. For example, associate account manager, account manager; account executive (levels 1 – 3) are assigned in HR to capture different salary and tenure levels. Mapping HR jobs to compensation role helps to manage the plan assignment process.

Compensation Plan Approval and Acceptance

Many US states now mandate that salespeople receive a document detailing how commission and bonus are calculated and paid and what products and services qualify for compensation. The document must include information for each incentive pay component included in the compensation plan, expected payment timing, and information as to what happens when an employee is terminated. The document must include information specific to each participant such as personalized target Incentive, personalized quota, and personalized rate table rates. It is also expected that terms and conditions are provided and signed off.

Compensation Plan documents, and compensation data, must be retained for a minimum of seven years in the US and 10 years in other countries such as the European Union.

It is important that compensation administrators can easily manage and monitor the approval process so that commission can be paid in a timely manner. Some organizations require that the plan is signed off on and approved before commission is paid out to sales reps. It is also important that salespeople and administrators can access approved and accepted compensation plans for audit and legal purposes.

Compensation Administrators should be able to generate plan documents for individual participants and in masse. Organizations may have less than 100 payees (compensated individuals) or 65K participants or more. We cannot expect compensation administrators to manually generate thousands of plan documents. Alternatively, if a plan (document) is rejected it will need to be updated and re-generated individually and sent for approval again.

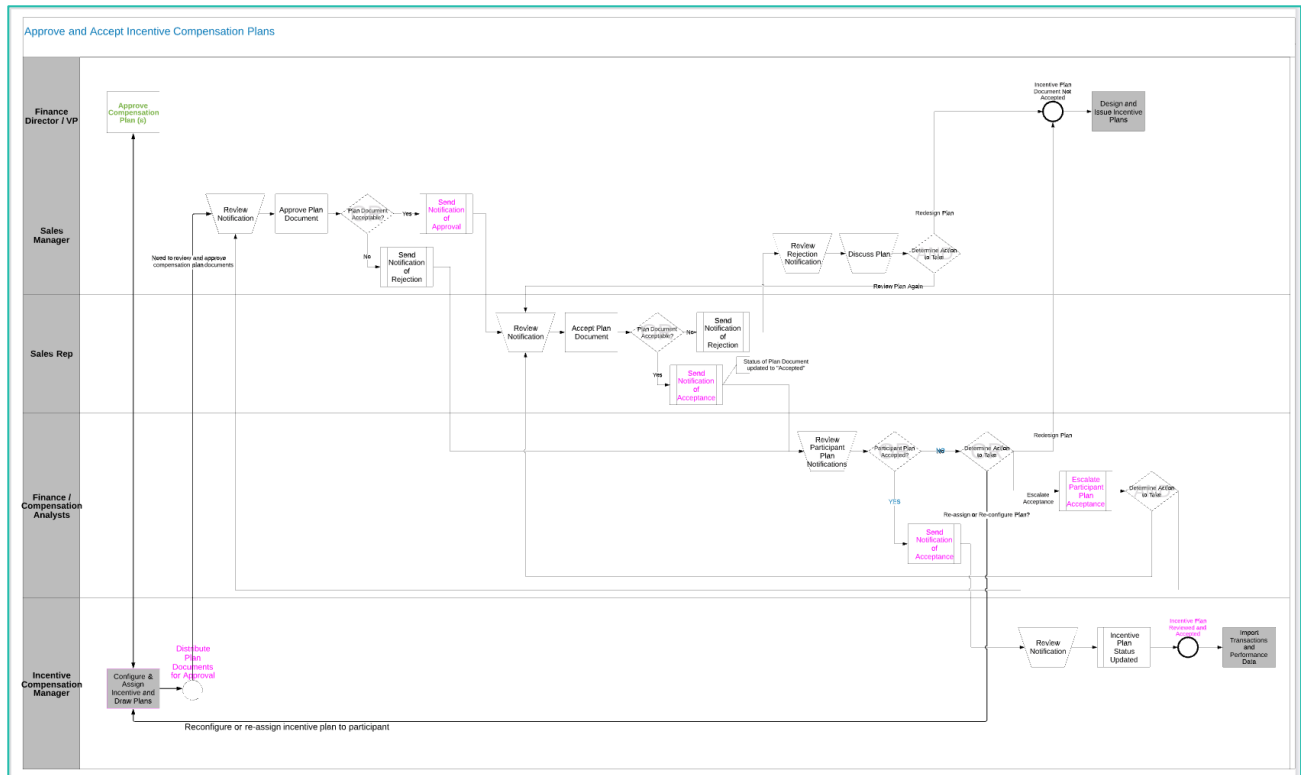
Following is a legal checklist suggested by the **Alexander Group**, a premier global sales and revenue growth management consulting firms:

Legal Planning Checklist	
Action Item	Completed
Written Document	
Program Start and End Dates	
Definition of Earned	
Sales Crediting Rules	
Calculation Method Documented	
Timing of Payments	
Treatment of Draws, Advances, Paybacks	
Exemption Status	
Legal Counsel Review	
Employer Signed Plan Document	
Employee Acceptance Signature	

© 2012 The Alexander Group, Inc.® Preparing for California's New Sales Compensation Law - September 12, 2012 35

A standard approval flow is depicted below. Enterprise organizations often include finance analysts in monitoring the approval process. Finance Directors may also be expected to approve the plan document and sign-off on the approval in addition to sales reps. Some countries in the European Union require that a physical document is signed and retained for legal purposes.

Small companies may have much simpler workflow requirements and only need the signature of salespeople.



L3 Payee Compensation Plan Approval Flow

Current implementation of the compensation plan approval process and sign off is managed through the DocuSign extension. A new alternate document generation method might be considered with the introduction of Management Reporting in Anaplan.

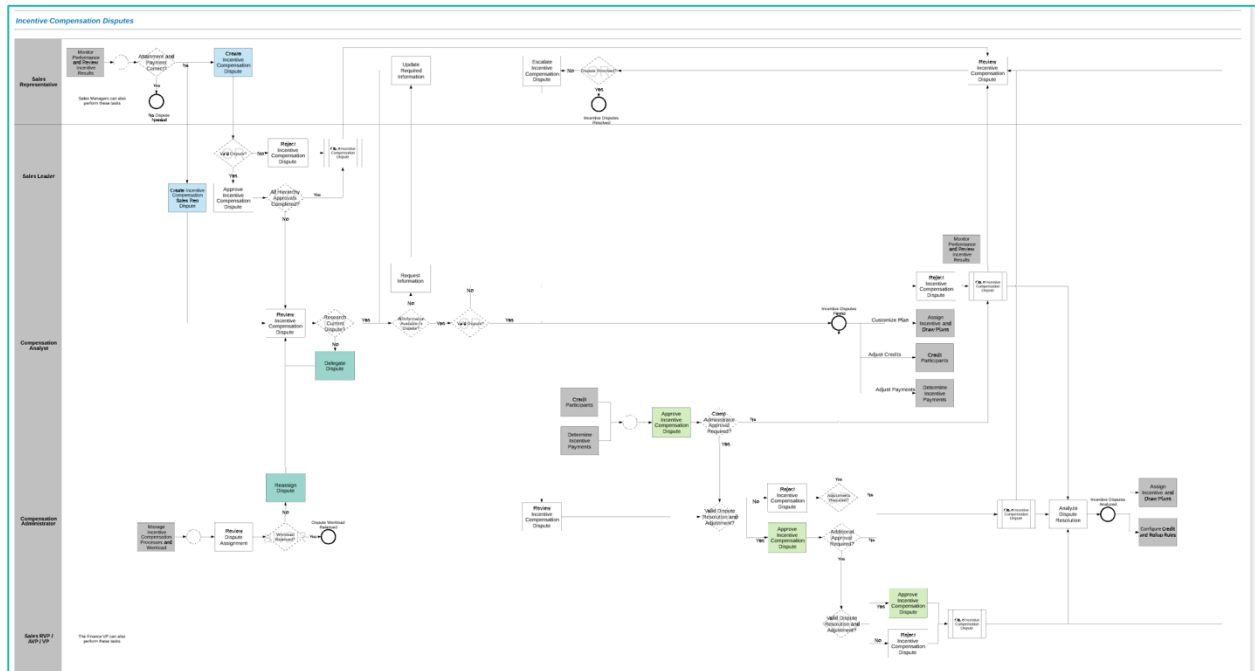
Dispute Management

No matter how automated incentive compensation management is, there are always exceptions that need to be managed. Incorrect or out-of-date territory assignments, incentive compensation plan assignments, credit rule exceptions, etc., may occur and need correction. Rather than tracking and handling errors via email or phone calls these exceptions are typically managed within the Incentive Compensation Management (ICM) solution using a dispute module. Assignments for managing payee disputes can be automated as well.

Larger sales organizations quite often have many compensation analysts, ranging between a few to 100s, who manage compensation processes and salespeople. Analysts may manage salespeople within certain regions, or salespeople on specific compensation plans, or even certain processes within (ICM). Using the same logic for assignment methodology, analysts should be assigned to salespeople within the solution application. This way, **dispute notifications can be automatically routed analysts** who manage the salesperson who created the dispute.

- Assign a compensation analyst / manager to each salesperson or region
 - Mapping logic might be used to automatically map assignment during on-boarding
- Dispute is created by the salesperson
- Dispute assigned and notification is automatically routed to the analyst

- Dispute notification can be routed to sales managers if desired or needed



L3 Dispute Flow

Payment Approval

Most organizations have a commission and bonus payment approval process in place. At a minimum there is a high-level review of earnings prior to sending them off to payroll or accounts payable for payment.

Some companies may require a two-step approval process:

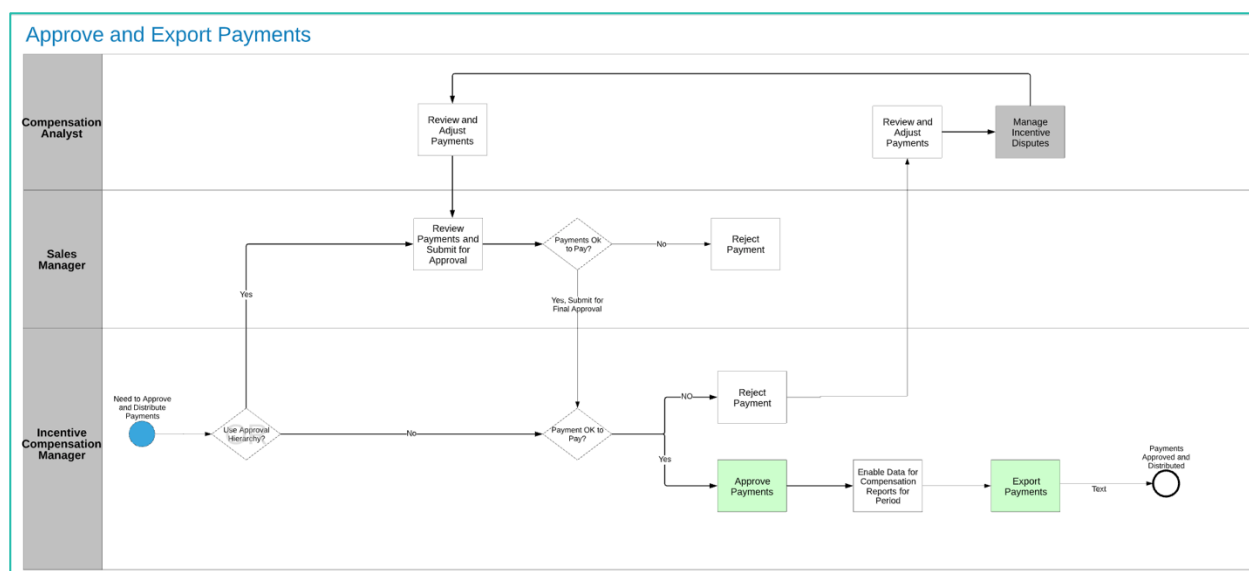
- First the earning information is sent to sales managers for review and approval
- Next compensation analysts/managers review and approve and then send to payroll

Other companies may only require a single step approval by compensation analysts – especially larger enterprises. In many cases the approval process can be bypassed, and **payments automatically approved**. Typically, automatic approvals are performed using rules such as “approve automatically if the total earning amount is less than a threshold amount”.

For example, automatically approve or review:

- Account Executives payments with earnings for the month between 0 and 15,000.
- Payments greater than 15,000 must be reviewed by RVP and or Finance

Rules will likely need to vary by sales role.



L3 Payment Approval Process Flow

Sales Rep (Payee) Metrics and Dashboards & What-ifs

Performance metrics are some of the most important outputs to the ICM process. Providing accurate, up-to-date attainment performance, earning, and payment information allows salespeople to trust the system. When trust in reporting is achieved, salespeople spend less time “shadow accounting” and more time selling.

According to the latest **Forrester Total Economic Impact of Anaplan** case study there is a 1.5% cost savings for “improvement in SG&A cost ratio through improved visibility, spend optimization, and cost reduction.” Cost savings can translate into millions of dollars.

Best in class solutions provide a commission estimator – the ability to perform “what-if” estimation of potential commission earnings. Providing this type of sandbox helps to keep salespeople engaged and focused on the deals that will bring in the highest potential commission and bonus. Levers such as opportunity stage, margin, and discounts should be included to help optimize future commission results based on compensation plan strategy which reflects overall company strategic objectives.

Salespeople reports and dashboards should support answers to this question:

- “What am I currently doing that’s contributing to my success or failure?”

It is often equally important for sales reps to be able to access their performance and payment information via mobile. Especially for field sales and partner sellers who may not have easy access to log into their Anaplan dashboards, and for those reps with “what-if” commission estimators.

Sales Manager and Team Metrics and Dashboards

Sales Managers and Leaders need to understand their own performance and earning outcomes and should also have access to meaningful team metrics and reporting. An automated ICM solution allows for many opportunities to track and report on team metrics. When this kind of

reporting is available it's much easier to be pro-active in determining sales effectiveness for sales teams and across the organization.

Some examples of sales leader reports are:

- Team ranking based on attainment percent achieved (by measure/plan component)
- Team and individual direct report's velocity
- Win and renewal rates
- Attrition and ramp rates
- Product and performance trending

Now more than ever, it's even more important to monitor team performance:

*"The number of companies estimating that over half their sales organization hit quota has declined from 58% of companies in 2019, to only 30% of companies in 2020 but shows more optimism for 2021 at 36%," said **Mark Donnolo**, managing partner of **SalesGlobe**. "However, this is still concerning because quotas across companies are also expected to decline for 2021."*

Management by Objectives (MBOs) are often a large part of salespeople incentives. Oftentimes point solutions* sell separate MBO modules. Anaplan provides this functionality as part of the ICM process. Sales leaders have the ability to create and assign objectives to their teams, and review and score the objectives alongside their direct reports. Sales Managers can input the bonus directly or scores can be calculated via the solution. MBO results and trends are easily reported on as part of team performance.

Dashboard and reports should contribute to answering this question:

- "What could I or my team be doing better, and how will these changes effect performance in the future?"

According to the **Harvard Business Review**, *The New Science of Sales Performance* white paper:

"40% said scattered information and limited visibility into data were impediments to the sales organization that required technology investments."

Providing the right information and insights to sales leaders and sales operations, at the right time, plays a huge role in managing sales effectiveness.

*"Today, the role of sales leaders and sales operations leaders has been revolutionized due to the adoption of dynamic practices and supporting technologies," says Peter Ostrow, vice president and research director for sales effectiveness and strategy at **Aberdeen Group**. "The advantage these executives have is that there are data and tools available to them that offer far more insights into the deals, the people and the markets they are selling into."*

***Point Solution:** Point solutions, or off-the-shelf solutions, are great for solving a single process pain. However, most point solutions are limited to what is pre-packaged and often lead to siloed processes.

Compensation Manager and Metrics and Dashboards

Compensation Managers and Finance benefit greatly by utilizing underlying data and outcomes from ICM. Many types of reports and dashboards are created to support these needs in addition to operational exception reporting such as:

- Market benchmarking and incentive pay analysis and comparison
- Analysis of pay mix and target incentives
- Pay for performance and distribution
- Cost of sales and commission expense accruals
- Compensation plan modeling and planning what-ifs

Compensation Plan Modeling is usually a separate exercise represented within a separate solution/application.



According to Gartner's *Market Guide to Sales Performance Management*, published 3/8/2021:

"By 2026, 25% of organizations using a sales performance management (SPM) solution will optimize the design and maintenance of their sales compensation plans using advanced analytics solutions provided by their SPM vendor.

By 2022, 40% of B2B companies with more than 100 payees will employ sales performance management solutions to reduce their hidden incentive compensation overpayments by 3% to 5%."

Benefits of Automating Incentive Compensation Management

Anaplan's Incentives and Rewards solution extends territory and quota planning as part of the sales planning and execution process. When customers have implemented and use territory planning, hierarchies, territory definitions, sales rep assignments and criteria should be exported to a Data Hub. These definitions should then be imported into the Incentives and Rewards solution and used for sales crediting for both initial setup and on-going maintenance. For those organizations that don't use a planning solution, crediting structures, assignments, and criteria can be created and maintained within incentive compensation management.

Quota should be exported into the Data Hub and imported to the Incentive Compensation solution at the payee, measure level.

Of course, automating the ICM process create many benefits with or without direct connection to territory and quota planning:

- Align sales strategy with territory planning through to incentives and rewards
- Analyze, report on, and intuitively maintain all rules and data
- Use any attribute or dimension, measure any metric, credit any and multiple fields (e.g., amount, quantity, margin) to configure credit and plan rules and expressions
- Create and calculate components using pre-built standard industry formula and concepts
- Enable direct integration and provide a single source of truth
- Ensure greater accuracy resulting in less disputes and lower operational costs
- Provide automation and workflow for common processes such as dispute management, compensation plan assignments and approval, MBOs, and payment approvals
- Lock down payments using dynamic control access and snapshots
- Separate compensation administration and reporting models to eliminate concurrency issues for large enterprises
- Test calculation using "What-if" functionality and view results against attainment to validate crediting and plan rules
- Provide complete auditability with in-built history tracking
- Plan for future compensation plan changes due to sales contests, rollout of new products, shifts of focus to different industries and market segments by using compensation plan what-if scenario modeling and comparisons
- Make better decisions across departments by sharing incentive data with finance, marketing, and HR

Demo Information

Demo Participants & Plans

Strategic Comp Plan

- Individual rates calculated using target incentive, quota, and leverage (rate table multipliers) step calculation across tiers, and MBO components
 - Tom Frazier - NE, Ron Johnson - NE, Lemon Lemontree – NY, Janet Anderson – Mid-Atlantic, and more...

Enterprise Plan

- ACV Revenue with standardized rates based on ACV \$ using interpolation calculation in Q1 and highest rate tier calculation in Q2, and MBO components
- Has a **date effective plan component** with changes to quota and rate tier amounts
 - Will Thompson – NE, Reggie Waterbury (mid-year start) – NE, Colin Prust, and more

Mid-Market Plan

- Product Attainment by Term using a multi-dimension lookup table (MDLT) – 50% weight, Products by Units – 50% weight, and Margin % Spiff plan components
 - Regan Brooks – NE, Thomas Tripp – NE, Carolyn Berry, and many more not just NE

General Overlay

- Region Attainment Bonus, pays flat amount based on highest tier
 - Gabby Bosco, Joshua King, Janie Zalack

Hardware Specialist

- Re-uses Revenue Commission measure but calculates using different commission rates based on hardware products, and quantity attainment
 - Monroe, Major & Schere, Keighley

Services Specialist

- Re-uses Revenue Commission measure but only calculates for Services quantity attainment based on credit rules.
 - Les Gazer NE...

Cloud Specialist

- Re-uses Revenue Commission measure but only calculates for Cloud quantity attainment based on credit rules.
 - Elsbeth Wiesinger – New York

Demo Model Reset

Navigate to the “10.2 ICM & Sales Crediting Demo Assumptions” dashboard to reset the comp plan demo piece. The sales crediting demo has a separate reset action.

The Compensation Plan reset action “**RESET ICM Demo**” does the following:

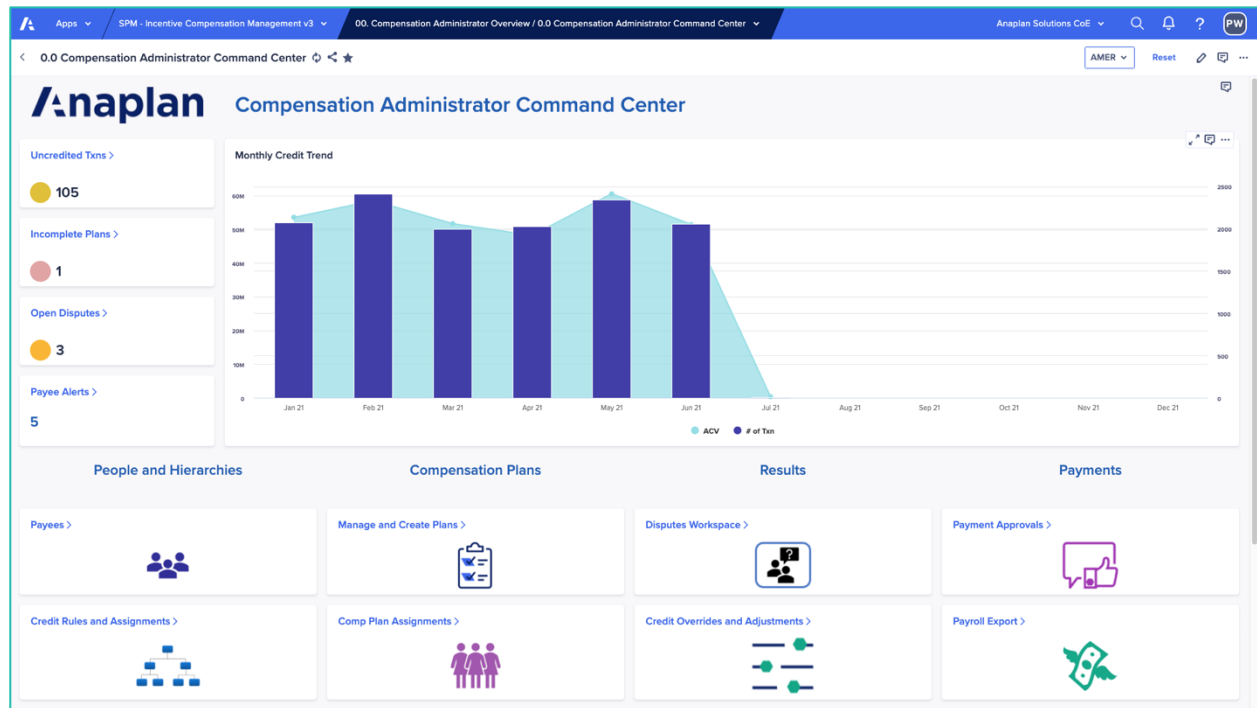
- Removes Reggie Waterbury’s (new hire) plan assignment
- Removes Will Thompson’s (role change) plan assignment
- Deletes any newly created compensation plans from the model

Run the “Run New Hire/Role Updates” action in the **Plan Assignment Engine** to show Reggie and Will’s new plan assignments to the Enterprise Plan if the comp plan demo is reset. Alli Simonson, also a new hire is assigned to the TBH1 credit rule during the demo (see below Manage Payees screen shot and demo steps.)

Compensation Administrator and Analyst Dashboards – Reporting and Collaboration

Command Center

Use this dashboard, as the Compensation Administrator, to understand key KPI and to monitor alerts to complete tasks based on missing assignments, changes to plans, sales rep disputes, and new data.



Compensation Administrator & Analyst Command Center

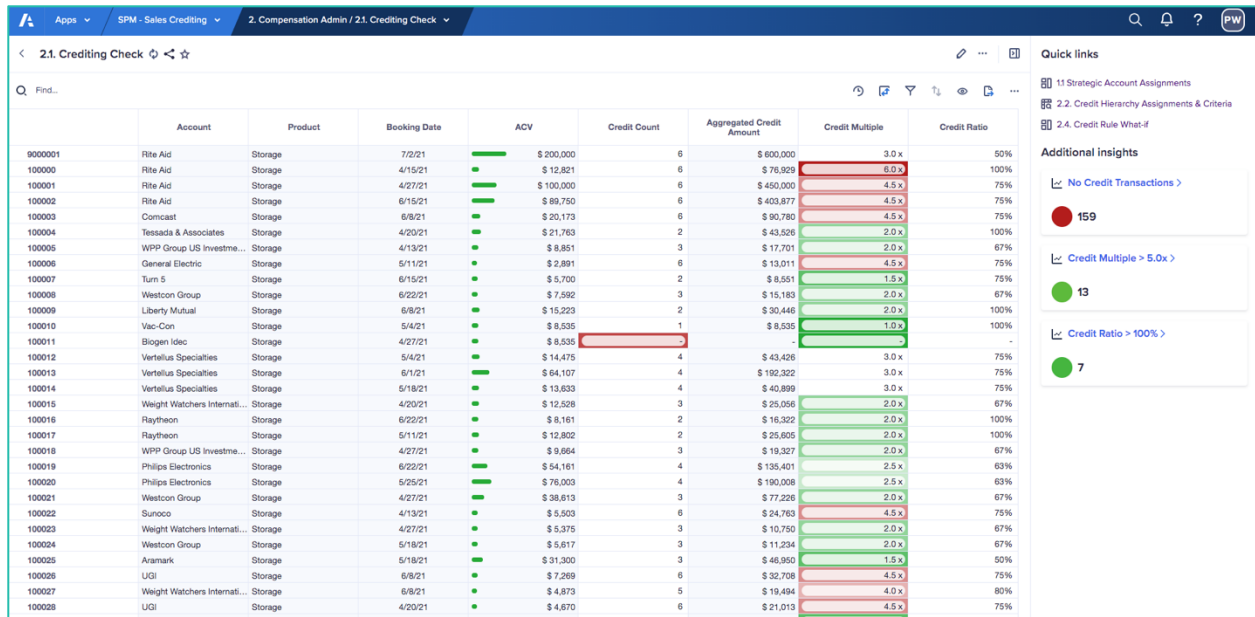
Start on this dashboard when demoing for the compensation administrator or analyst persona. The compensation administrator can instantly see if any task needs to be completed or data reviewed by viewing the KPI and alerts at the top of the dashboard.

He/she sees that there are many uncredited transactions. This may be because a recent change was made, or credit rules need adjusting.

Click the link to Uncredited to navigate to the Crediting Check page.

Crediting Check

Use this page to understand key KPI around crediting.

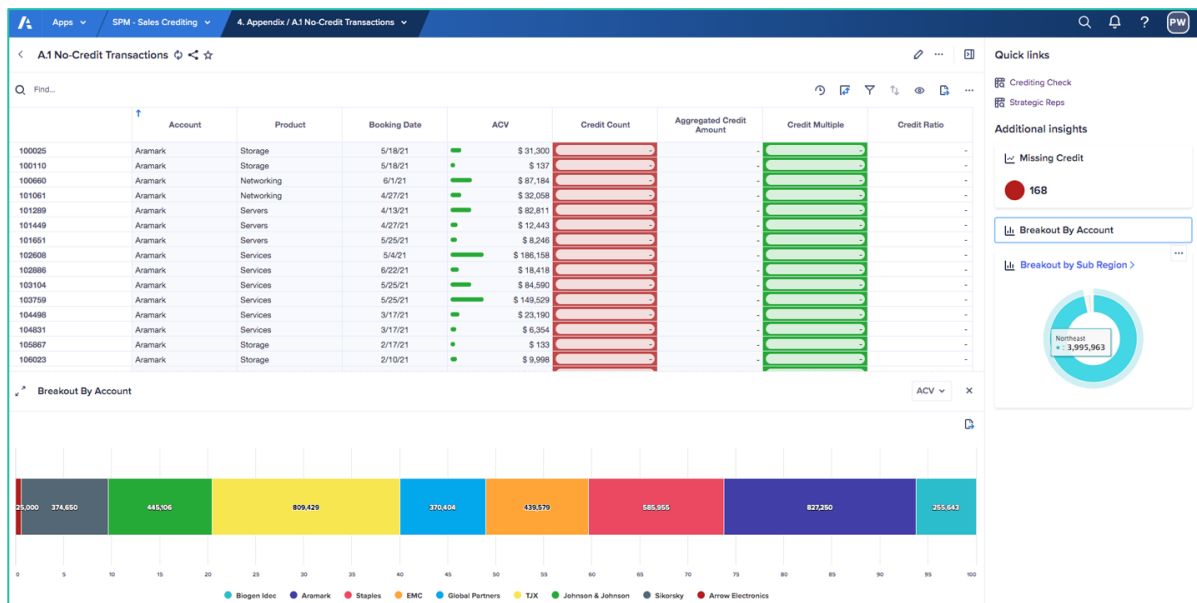


Crediting Check Dashboard

Are there transactions that did not receive credit?

Are there accounts or territories that receive too much or too little attainment for which you should adjust territory and credit rules?

Click the KPI Link for **Uncredited Transactions** We can see that none of these transactions triggered any credit assignments.



Uncredited Transactions Dashboard

Aramark and Biogen Idec are the first transactions listed in the account chart with no credits. Hover over the **Sub-Region Breakout donut chart**. We can also see that most of the missing

account assignments are for the Northeast. Let's check the account assignments for the Northeast. (NOTE: In some cases, you'll want to go into the T&Q Planning demo and show the missing account assignment for the Northeast for Key Account Assignments.)

At this point we understand that Territory and Credit Rules are likely out of sync for the Northeast sub-region. Navigate to the Credit Rule Hierarchy to investigate.

Click the Credit Rule Hierarchy and Criteria quick link. Select the Northeast Region to review.

Click the **Import Territory Changes** action. After this completes, you'll see a **TBH** (new hire placeholder) in the Northeast sub-region.

Select the **TBH** row and note that the uncredited transaction accounts are now included in the credit rules assigned to the TBH. We can view those accounts with credits assigned to the TBH in the Credit Overrides and Adjustments dashboard once the **Activate Credit Rules** action is run.

Click the Quick Link **Credit Adjustments and Overrides** to navigate to this page in the Additional Insights side panel.

Add a filter by selecting **Biogen Idec account** in the side panel. Select a transaction in the top grid to view the credits assigned to TBH below.

Now that we have the credit rules for the new hire in the system, we need to assign this territory to one of our new hires.

Click the Manage Payees quick link in the insights panel.

Payee/Participant On-Boarding – Manage Payees

View alerts for payees recently imported into the solution and address data issues to complete the on-boarding assignment process

Apps SPM - Incentive Compensation Management v2 06. Comp Analyst Day-to-Day Tasks / 06.1 Manage Payees Anaplan Demo Master

06.1 Manage Payees

Find...

	Picture	Alerts	Hire Date	Term Date	Role Start Date	Current Role	Previous Role	Location	Currency
Frazier, Tom			1/1/20		1/1/20	Strategic AE	Strategic AE	Northeast	USD
Johnson, Ben			1/1/20		1/1/20	Strategic AE	Strategic AE	Northeast	USD
Brooks, Reagan			1/1/20		1/1/20	Mid-Market AE	Mid-Market AE	Northeast	USD
Thomas, Tripp			1/1/20		1/1/20	Mid-Market AE	Mid-Market AE	Northeast	USD
Bosco, Gabby			1/1/20			General Overlay	General Overlay	Northeast	USD
King, Joshua			1/1/20			General Overlay	General Overlay	Northeast	USD
Zalack, Janie			1/1/20			General Overlay	General Overlay	Northeast	USD
Gezer, Les			1/1/20			Service Specialist	Service Specialist	Northeast	USD
Schere, Kaleighley			1/1/20			Storage Specialist	Storage Specialist	Northeast	USD
Monroe, Major			1/1/20			Network Specialist	Network Specialist	Northeast	USD

Count 9

Additional Insights

Alert Count

	AMER	EMEA
New Employee	-	-
Missing Role	75 Alerts	160 Alerts
New Role	3 Alerts	-
Missing Location	-	-

Alert Filter

Filter?

New Employee ☐

Missing Role ☐

New Role ☐

Missing Location ☐

Employee Profile

Location: Northeast

Hire Date: 1/1/20

Role Start Date: 1/1/20

Current Role: Strategic AE

Current Plan: Strategic Plan

Currency: USD

Add New Rep.

Payee On-Boarding Exceptions

Normally, new hires should be automatically imported into the application. Occasionally, there are issues keeping all systems up-to date so there is a provision to manually create payees. To create a new payee manually, **click the Add Employee action button**.

Add New Employee

First Name*

Last Name*

Role

Location

Currency

Start Date

Cancel

Submit

Fill in the required information in the form if adding a new payee.

All participants can be viewed in the Manage Payees worksheet. Use the **Alert Filters** to filter payees that need attention such as missing roles or new roles. Search at the top of the worksheet for a particular name or employee number.

Select a row for an employee and view details in the side panel.

Click the **Update HR Data** action to import new payees and role changes.

- Use the **New Employee** filter to show new hire payees
- **Select the Assign Territory line item to add a territory** for **Ali** and make sure the **role** is correct (is mapped to the strategic comp plan)
- This action will replace the TBH with Ali in the Credit Rule Hierarchy and Criteria dashboard

Navigate to the **Plan Assignment Engine** dashboard to kick off the plan assignment process. Alternatively, the new hire import process can be combined with the plan assignment and quota distribution processes and setup to run periodically to automate.

Plan Assignment

Plans are assigned in mass to payees based on the compensation role mapped to each payee. As new hires and role changes are imported into the solution, incremental assignments are also made here. To automate, setup this process to run periodically along with new hire and role change import, e.g., every night.

The screenshot shows the '6. Plan Assignment Engine' interface. It features a table with columns: 'All Roles', 'New Hire/Role', 'Role Update', 'Role Update Start Date', 'Role Update End Date', 'AMER', 'Plan', 'Start Date', 'End Date', and 'Full Year TI'. The table lists various roles and their corresponding plan assignments, such as 'Strategic AE' assigned to 'Strategic Plan' and 'Enterprise AE' assigned to 'Enterprise Plan'. Below the table, there are four buttons: 'Run New Hire/Role Updates', 'Run Mass Plan Updates', 'Add Plan to Person', and 'Finalize Payee Plan Quota'.

All Roles	New Hire/Role	Role Update	Role Update Start Date	Role Update End Date	AMER	Plan	Start Date	End Date	Full Year TI
Strategic AE	Strategic Plan	Strategic Plan	1/1/21	12/31/21	AMER				
Enterprise AE	Enterprise Plan	Enterprise Plan	1/1/21	12/31/21	US East				
Mid-Market AE	Mid Market Plan	Mid Market Plan	1/1/21	12/31/21	Northeast				
General Overlay	General Overlay	General Overlay	1/1/21	12/31/21	Bosco, Gabby				
Storage Specialist	Hardware Specialist	Hardware Specialist	1/1/21	12/31/21	General Overlay	General Overlay	1/1/21	12/31/21	0
Network Specialist	Hardware Specialist	Hardware Specialist	1/1/21	12/31/21	King, Joshua				
Cloud Specialist	Cloud Specialist	Cloud Specialist	1/1/21	12/31/21	General Overlay	General Overlay	1/1/21	12/31/21	0
Server Specialist	Hardware Specialist	Hardware Specialist	1/1/21	12/31/21	Zalack, Jamie				
Service Specialist	Services Specialist	Services Specialist	1/1/21	12/31/21	General Overlay	General Overlay	1/1/21	12/31/21	0
Overlay Manager	New Test Plan	New Test Plan	1/1/21	12/31/21	Rowley, Jodi				
Sales Manager	New Test Plan	New Test Plan	1/1/21	12/31/21	General Overlay	General Overlay	1/1/21	12/31/21	0
Regional Manager	New Test Plan	New Test Plan	1/1/21	12/31/21	Gazec, Les				
					Services Specialist	Services Specialist	1/1/21	12/31/21	0
					Schem, Keighley				
					Hardware Specialist	Hardware Specialist	1/1/21	12/31/21	0
					Monroe, Major				
					Hardware Specialist	Hardware Specialist	1/1/21	12/31/21	0
					Propp, Tim				
					Strategic Plan	Strategic Plan	1/1/21	12/31/21	60,000
					Johnson, Ron				
					Strategic Plan	Strategic Plan	1/1/21	12/31/21	60,000
					Brooks, Reagan				
					Mid Market Plan	Mid Market Plan	1/1/21	12/31/21	40,000
					Thomas, Tripp				
					Mid Market Plan	Mid Market Plan	1/1/21	12/31/21	40,000
					Waterbury, Reggie				
					Enterprise Plan	Enterprise Plan	7/1/21	12/31/21	50,000
					Thompson, Will				
					Enterprise Plan	Enterprise Plan	1/1/21	12/31/21	50,000
					Berry, Carolyn				
					Mid Market Plan	Mid Market Plan	1/1/21	12/31/21	40,000

- Click the **Run Mass Plan Updates** button to complete the mass assignment process. Run this process when needed if new plan components are added or ended for compensation plans and when new compensation plans are assigned.
- Click the **Run New Hire/Role Updates** button to assign newly imported payees to compensation plans based on their role assignment and to re-assign payees to new plans if their role has changed
- Click the **Add Plan to Person** button to create a single assignment manually
- Run the **Finalize Payee Plan Quota** after any of the above processes are run to distribute plan component quota across quarters and months defined for the calendar for each payee

To end date plan assignment for individuals, search for the salesperson's plan assignment in the right-hand grid and edit the end date. Assignment exceptions for individuals are also made in this grid using the **Add Plan to Person** action.

Navigate to **Payee Quota Distribution and Overrides** if quota for individual payees needs to be edited.

Plan Approval and Acceptance

After compensation plans are assigned and reviewed, they must be approved and accepted by payees. This dashboard displays a sample Compensation Plan with payment detail along with document Terms and Conditions information at the payee level.

Anaplan Payee Compensation Plan Document

Strategic Plan - Frazier, Tom

The Plan

The Plan: This document, The Sales Compensation Plan is the governing document for your compensation plan. The plan is not an employment contract between the company and you. The company reserves the right to terminate any participant's employment or participation in the plan at any time, for any reason with or without cause. The company reserves the right to amend or modify the plan by furnishing each affected participant written notice of changes. All changes are effective as stated in the specific change notice. The company reserves the right to prospectively and unilaterally modify any aspect of the plan.

Pay Component Information

Sales Activity Quarterly Bonus		Quarterly Revenue Commission	
Component Type	MBO	Commission - OTE	
Measure Metric	Quantity	ACV	
Yearly Quota	-	7,000,000	
Target Incentive	60,000	62,000	
Attainment Interval	Quarterly	Quarterly	
Payout Interval	Quarterly	Monthly	

Performance Weights and Measures

There are three components to your 2021 Sales Compensation Plan: 1) Base Salary 2) Variable Compensation and 3) Management by Objectives 1) Base Salary: The amount of your annual base salary is specified in your job offer letter. 2) Variable Compensation: The amount of your annual variable compensation ("Opportunity") is specified in your job offer letter.

Payouts occur each month, one month in arrears. Payouts are based on year-to-date (YTD) performance to quota (PTQ) which is defined as YTD invoiced sales divided by YTD quota. The monthly amounts are reconciled with past payouts. Calculation: YTD Payout % x YTD Opportunity, minus what has already been paid. Your monthly compensation statement will walk through each piece of the calculation, and a calculator is also available.

Rate Tiers and Rates

Tier Rates (Choose Component Above)

Quarterly Revenue Commission					
	Range	Tier Commission %	Plan Component Weight	Bonus \$	Target Incentive Rate
Tier 1	0% - 60%	0.4286%	100%	-	-
Tier 2	60% - 80%	1.029%	100%	-	-
Tier 3	80% - 100%	1.286%	100%	-	-
Tier 4	100%+	1.714%	100%	-	-
All Tiers	100%+		100%		

Quota

Individual sales target assigned to you as a required minimum for a specified timeframe. Quota targets are a summation of revenues

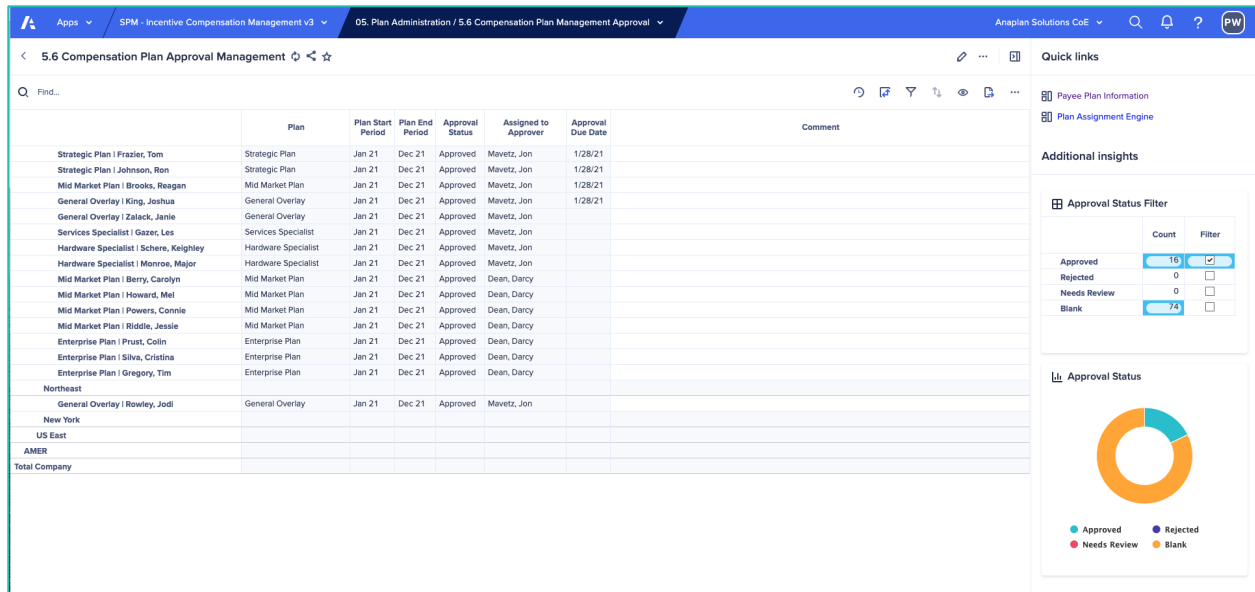
Compensation Plan Document

The rate table is not sync'd with plan components. We've hard coded the plan document to display the Quarterly Revenue Commission plan component's rate table. The MBO component doesn't have a rate table. Click the ellipsis at the top right corner to **Export to PDF**.

Typical workflow for the plan acceptance process involves these steps:

- Compensation Administrator/Analyst review plan assignment and information, edits if needed and submits for approval
- Sales Manager for direct reports receives notification, reviews and approves or rejects the plan assignment
 - If approved, the salesperson receives notification and accepts the compensation plan
 - If accepted, a notification is sent to the commission team and sales manager
 - If rejected, a notification is sent to the commission team and sales manager along with reason so action can be taken to correct

Compensation Administrators need the ability to monitor approvals and rejections across the organization. Typically, a dashboard is provided so that administrators/analysts can escalate any approvals not made in a timely fashion. They may also need to re-issue rejected compensation plan documents after corrections are made.

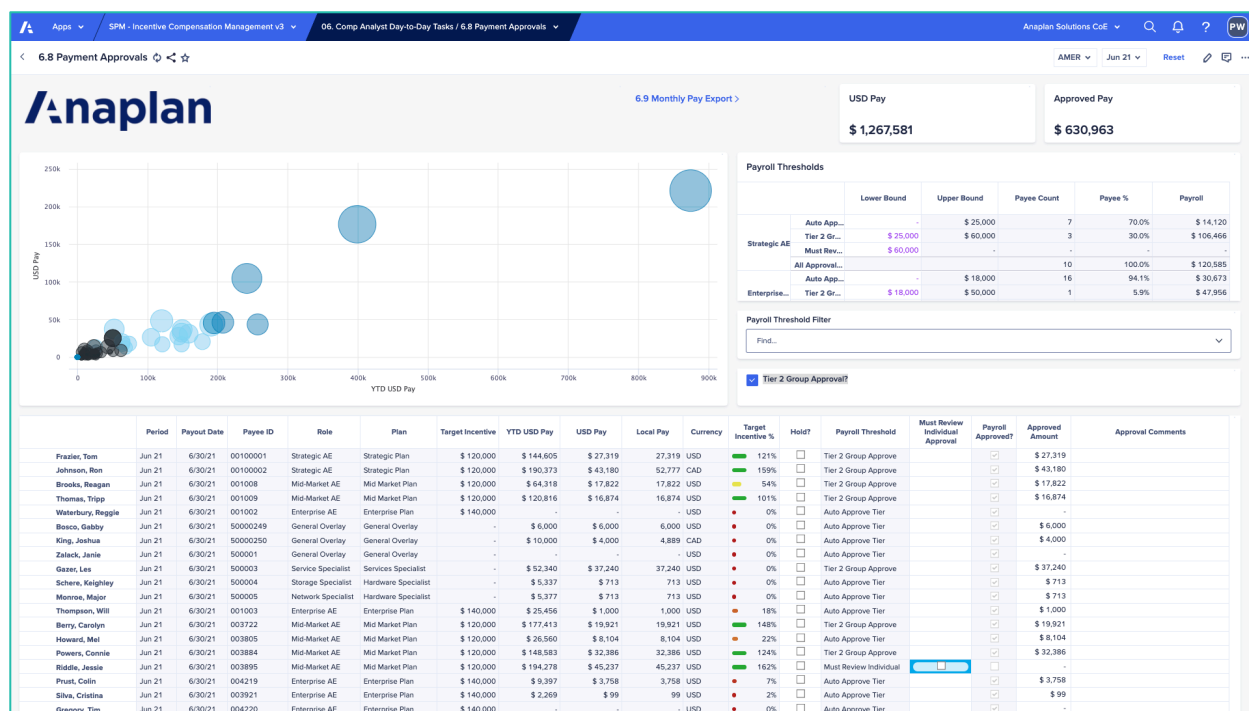


Compensation Plan Approval Monitoring

Filters are provided for each status to help monitor the approval process. Many organizations do not release commission payments until an approved and signed document is in place.

Payment Approvals & Export

This dashboard is where the compensation administrator or one or several compensation analysts review earnings for the current period.

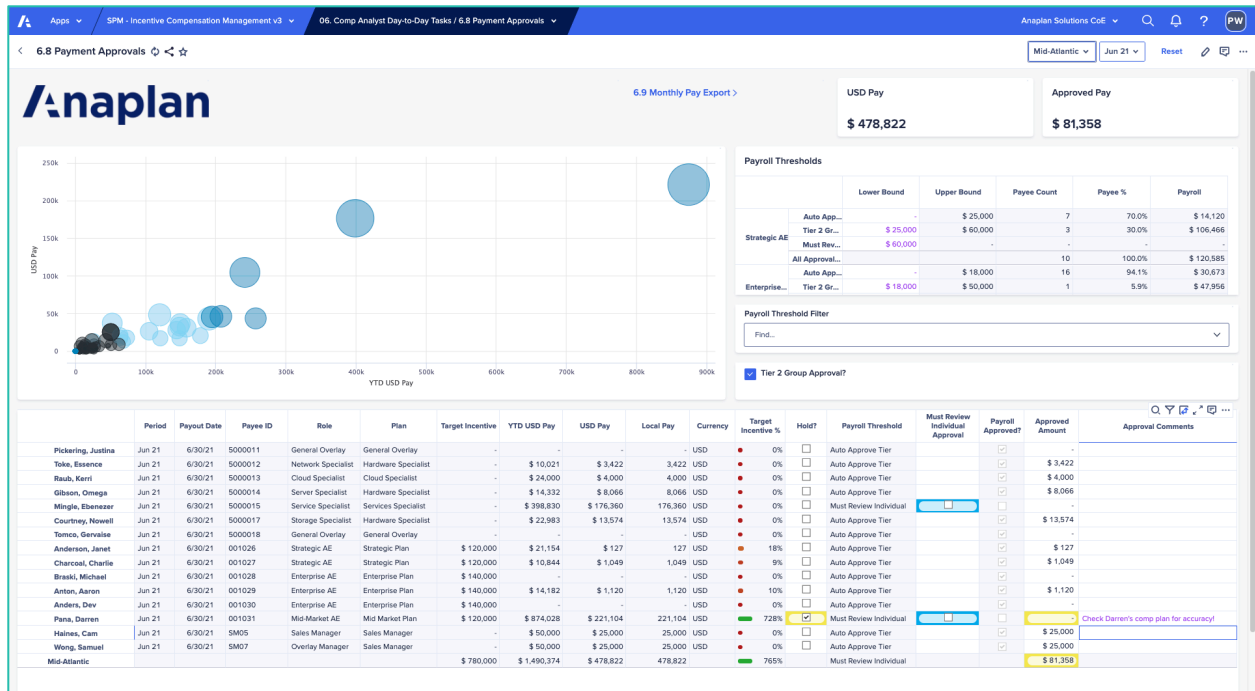


Compensation Payment Approvals

The graph represents earnings for the period and analysts can quickly see where outlier payments fall.

Rules are in place to automatically approve payments when they fall with the designated boundaries based on **compensation roles**. When earnings fall outside of the rules, they must be reviewed and approved by either compensation administrators or by finance.

Non approved earnings can be held back from the payment export if reviews and approvals are not timely.

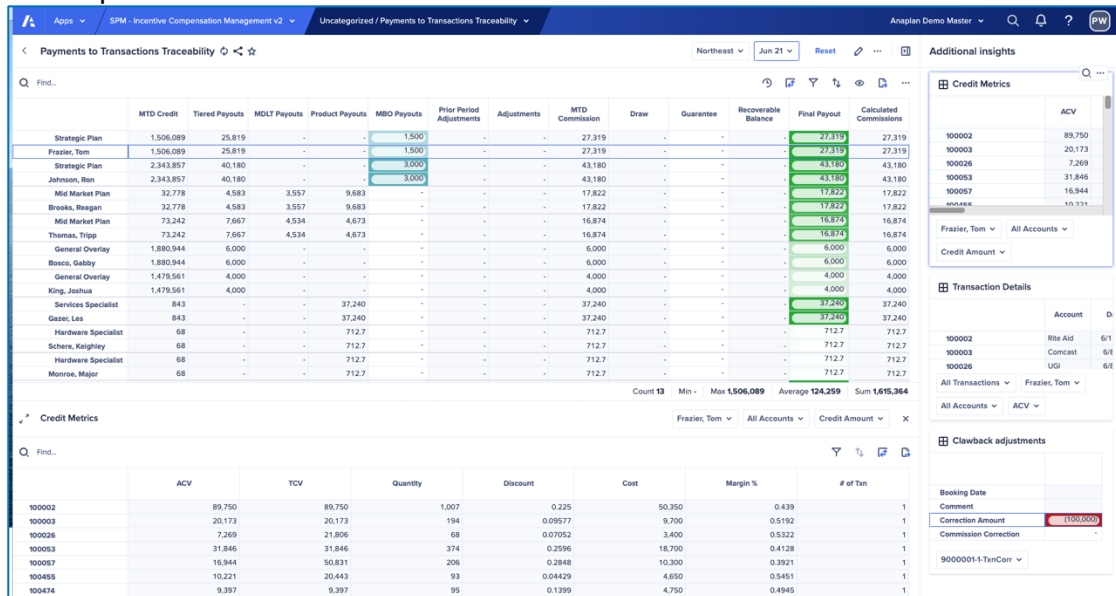


Payment Approvals with Tier 2 Filter

Filters can be applied to view different approval tiers along with the page selectors if needed. Held payments might need to go to finance and sales leaders for approval prior to release.

Share the Page (via Slack if enabled) with **finance** and the **sales manager**. The finance manager is brought to this page for review and if further investigation is needed can click the link to the payment traceback dashboard.

A link is provided to drill down to view earning details (attainment and transactions) during the review process.



Payment Trace Back

Differentiator

Most point solutions don't have much flexibility, or the ability to automate compensation payment approval at such a granular level.

Once earnings are reviewed and approved for the relevant period, they are exported to the payment system.

	Payroll Approved?	Period	Payout Date	Payee ID	USD Pay	Local Pay	Currency
Frasier, Tom	<input checked="" type="checkbox"/>	Jun 21	6/30/21	00100001	\$ 43,180	52,777	CAD
Johnson, Ron	<input checked="" type="checkbox"/>	Jun 21	6/30/21	00100002	\$ 43,180	52,777	CAD
Brooks, Reagan	<input checked="" type="checkbox"/>	Jun 21	6/30/21	0010008			
Thomas, Tripp	<input checked="" type="checkbox"/>	Jun 21	6/30/21	001009	\$ 16,874	16,874	USD
Waterbury, Reggie	<input checked="" type="checkbox"/>	Jun 21	6/30/21	001002	-	-	USD
Bosco, Gabby	<input checked="" type="checkbox"/>	Jun 21	6/30/21	50000249	\$ 6,000	6,000	USD
King, Joshua	<input checked="" type="checkbox"/>	Jun 21	6/30/21	50000250	\$ 4,000	4,889	CAD
Zalack, Jamie	<input checked="" type="checkbox"/>	Jun 21	6/30/21	500001	-	-	USD
Garcia, Lee	<input checked="" type="checkbox"/>	Jun 21	6/30/21	500003	\$ 37,240	37,240	USD
Schena, Kaleigh	<input checked="" type="checkbox"/>	Jun 21	6/30/21	500004	\$ 713	713	USD
Monroe, Major	<input checked="" type="checkbox"/>	Jun 21	6/30/21	500005	\$ 713	713	USD
Thompson, Will	<input checked="" type="checkbox"/>	Jun 21	6/30/21	001003	\$ 1,000	1,000	USD
Berry, Carolyn	<input checked="" type="checkbox"/>	Jun 21	6/30/21	003722	\$ 19,921	19,921	USD
Howard, Mel	<input checked="" type="checkbox"/>	Jun 21	6/30/21	003805	\$ 8,104	8,104	USD
Powers, Connie	<input checked="" type="checkbox"/>	Jun 21	6/30/21	003884	\$ 32,386	32,386	USD
Riddle, Jessie	<input checked="" type="checkbox"/>	Jun 21	6/30/21	003895	\$ 45,237	45,237	USD
Prust, Colin	<input checked="" type="checkbox"/>	Jun 21	6/30/21	004219	\$ 3,758	3,758	USD
Shu, Cristina	<input checked="" type="checkbox"/>	Jun 21	6/30/21	003921	\$ 99	99	USD
Gregory, Tim	<input checked="" type="checkbox"/>	Jun 21	6/30/21	004220	-	-	USD
Mavett, Jon	<input checked="" type="checkbox"/>	Jun 21	6/30/21	SM01	\$ 25,000	25,000	USD
Dean, Darcy	<input checked="" type="checkbox"/>	Jun 21	6/30/21	SM02	\$ 10,000	10,000	USD
Simonsen, Alli	<input checked="" type="checkbox"/>	Jun 21	6/30/21	S01 - TBH - KEY - 1	\$ 6,391	-	-
Rowley, Jodi	<input checked="" type="checkbox"/>	Jun 21	6/30/21	500002	-	-	USD
Wiesinger, Elizabeth	<input checked="" type="checkbox"/>	Jun 21	6/30/21	50000271	\$ 7,840	7,840	USD
Horak, Michael	<input checked="" type="checkbox"/>	Jun 21	6/30/21	50000272	\$ 16,835	16,835	USD
Little, Eleanor	<input checked="" type="checkbox"/>	Jun 21	6/30/21	500006	\$ 13,936	13,936	USD

Payment Export Submission

Earnings are aggregated by payee and include the employee identifier needed by the payment system. Earnings are converted to the payee's **payout currency** using a monthly (spot rate) conversion rate.

For demo purposes, **Ron Johnson's payout is converted to CAD currency.**

Conversion rate frequency can be configured to whatever frequency is needed.

Click the Submit Payment Export action button to export payments and send a notification to the payroll.

Select the Approved Payment check box and then click the **Notify Payroll** action button.

Send notification

Recipient

pamela.walker@clearly@anaplan.com

Message

Commission for June has been reviewed and approved and is ready to be processed

Cancel

Send

Disputes and Dynamic Notifications

Payees can monitor their disputes, add, and see comments, and create disputes in his/her workspace. Compensation Analysts have their own workspace where they approve and manage disputes.

Transaction Correction	Dispute Category	Dispute Reason	Account	Transaction	Document Link	Submission Date	Resolution Date	Days to Resolve	Dispute Escalated?	Resolution Decision
Account Assignment	Account Assignment	Existing Account / Channel ...	Rite Aid	9000001	https://anaplan.box.com/s/3i...	6/10/21	6/17/21	7 days	<input checked="" type="checkbox"/>	Approved
Frazier, Tom					https://anaplan.box.com/s/3i...	5/25/21		7 days	<input type="checkbox"/>	

Analyst Dispute Workarea

Email notifications are automatically sent to the compensation analyst based on analyst assignment to sub-region. Email is dynamically sent to different individual analysts based on rules established within the solution. Model rules can be easily modified based on customer criteria and business needs.

Start off in the Payee Dispute dashboard. Select a draft dispute and then **click the submit dispute check box** in the grid. Next click the **Notify Comp Analyst** action button to show the analyst who will automatically be assigned the dispute along with the message.

In the compensation analyst dashboard, KPI and filters are available to view disputes needing attention.

Click the **Filter Only Escalated Dispute?** filter to view the escalated dispute. Comments relevant to the selected dispute are displayed.

Compensation Analysts can **Share the Page** or **@Comment** the Sales Manager or Sales Ops with any questions around dispute information. Additional approvers can be added to this flow if needed. For example, in some organizations Sales Managers or RVP may be required to approve disputes prior to closing.

Document (links) can be added as attachments by sales reps and reviewed by approvers as part of the dispute validation.

Click the Plan Document link in the escalated dispute for Thomas Tripp to review his new plan information related to the dispute.

Crediting Overrides & Transaction Adjustments

When disputes are assigned to analysts, they can use the Crediting Override and Transaction Adjustment dashboards in addition to the Payment Trace Back dashboard to research and make adjustments if needed.

The dashboard interface shows a main table of transactions with various attributes. A summary row at the bottom of the main table provides aggregate statistics: Count 14, Min 0.3561, Max 100000, Average 16784.3422, and Sum 100706.0531. Below this is a 'Rep Crediting Summary' table that details credit rules and overrides for different roles. The right sidebar offers filters for Account, Transaction ID, Sub Region, Product, Industry, Zip Code, Start Date, and End Date.

Search for a transaction and view all related credits. Override credit splits and add additional credits as exceptions to your rules in this page.

Pre-defined filters are included in the side panel to make searching easier.

Sales Rep Credits and Sales Manager Rollup Credits can be viewed in relation to the selected transaction row in the worksheet by including **side panel insights** in the main canvas.

- We can also modify credits created by rules
 - Click the **No Credit** check box to remove credit attainment
 - Click the **Add Manual Credit Adjustment** action button and add a new credit transaction adjustment for sales reps not covered by credit rules
 - Click the **Override Rollup to Manager** check box to remove sales manager(s) roll up attainment

To create transaction adjustments for current or prior periods click the **Prior Period Adjustments – Transaction Corrections** quick link.

Apps > SPM - Incentive Compensation Management v2 (Jon Mavetz) > 5. Appendix / Prior Period Adjustments - Txn Corrections >

Prior Period Adjustments - Txn Corrections

Anaplan Prior Period Adjustments

Transaction Correction Details

Txn Correction	Invoice Date Correction	ACV Correction	Correction Amount	Process Date	Comment	Process?	Process Status
Process Transaction Correction							

Processed Transaction Corrections

	Booking Date	Orig Amount	Invoice Date Correction	ACV Correction	Correction Amount	Process Date	Comment	Process?	Process Status
9000001-TenCen	1/3/21	\$ 200,000	2/8/21	\$ 100,000	\$ -100,000	2/12/21	50% reduction in ten	<input checked="" type="checkbox"/>	Processed

Transactions

	Account	S4 Payee	Product	SKU	Term	Industry	Segment	Booking Date	Txn ACV	TCV	Quantity	ASP/Unit	Discount	Cost	Margin %
9000001	Rite Aid	Frazier, Tom	Storage	SKU 2	3 yr	Consumer	Key	1/3/21	200,000	300,000	100	\$ 2,000	-	\$ 30,000	70%
100000	Rite Aid	Frazier, Tom	Storage	SKU 2	2 yr	Consumer	Key	4/15/21	12,821	25,643	128	\$ 100	12.9%	\$ 6,400	50%
100001	Rite Aid	Frazier, Tom	Storage	SKU 10	3 yr	Consumer	Key	4/27/21	100,000	300,000	606	\$ 165	35.6%	\$ 30,300	70%
100002	Rite Aid	Frazier, Tom	Storage	SKU 3	1 yr	Consumer	Key	6/15/21	89,750	89,750	1,007	\$ 89	22.5%	\$ 50,350	44%
100003	Comcast	Frazier, Tom	Storage	SKU 2	1 yr	Manufacturing	Key	6/8/21	20,173	20,173	184	\$ 104	9.6%	\$ 9,700	52%
900004	Wells & A.	Pena, Dawn	Storage	SKU 2	3 yr	Services	Mid Market	4/20/21	21,763	65,290	257	\$ 85	26.4%	\$ 13,690	41%
100005	WPP Group	Pughes, P.	Storage	SKU 1	2 yr	Telecom	Enterprise	4/13/21	8,851	17,701	95	\$ 93	19.0%	\$ 4,750	46%

Corrections/Clawbacks Summary

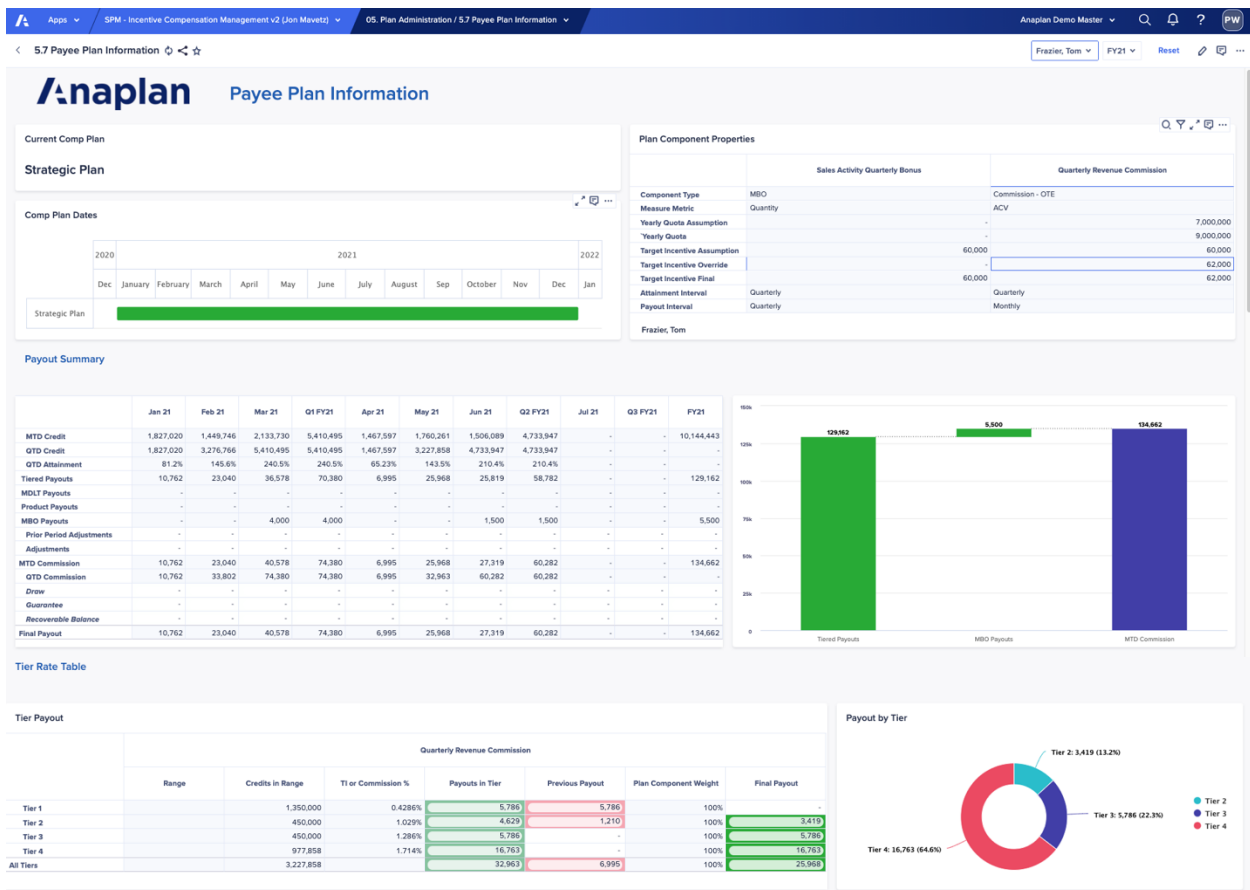
	Commission Correction

Click the **Transaction Correction** action button to add an offset adjustment.

Earning calculation offsets for all applicable credit receivers will be created and applied to current period payments.

Payee Plan & Payment Dashboard

A comprehensive plan and payment dashboard is available to compensation administrators and analysts.

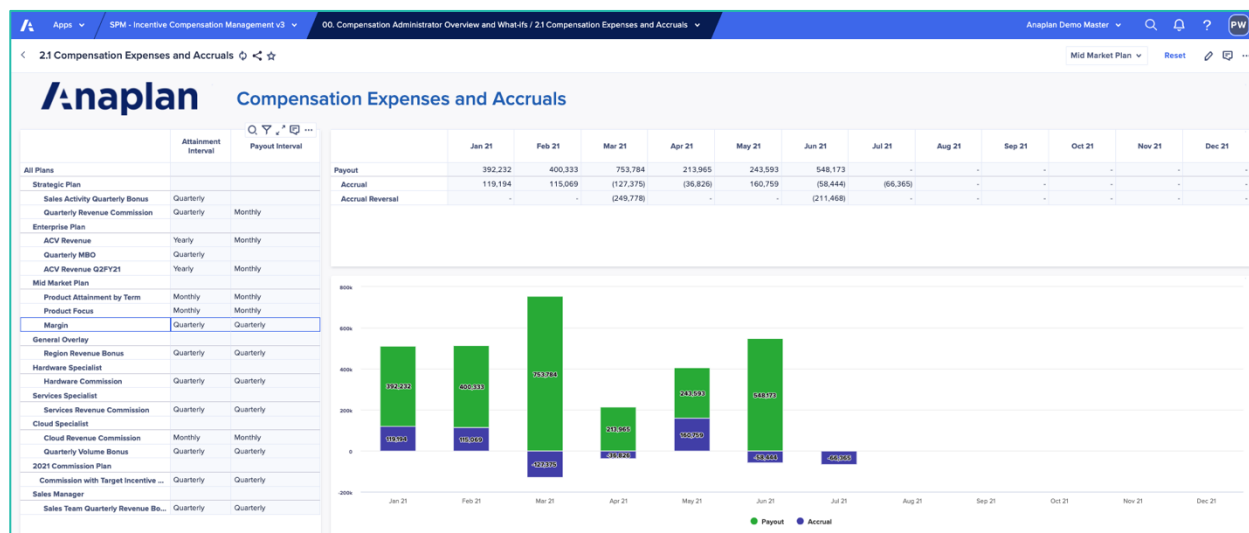


This dashboard can be used to review compensation plan assignments and plan override details for individual sales reps and sales managers. It can also be referenced, if needed, **when resolving disputes**.

Detail payment information, including payments by different rates and true-up calculation, is provided so that analysts view the same information as payees do.

Commission Accruals

This dashboard provides commission accrual information to finance.



Commission Expenses and Accruals

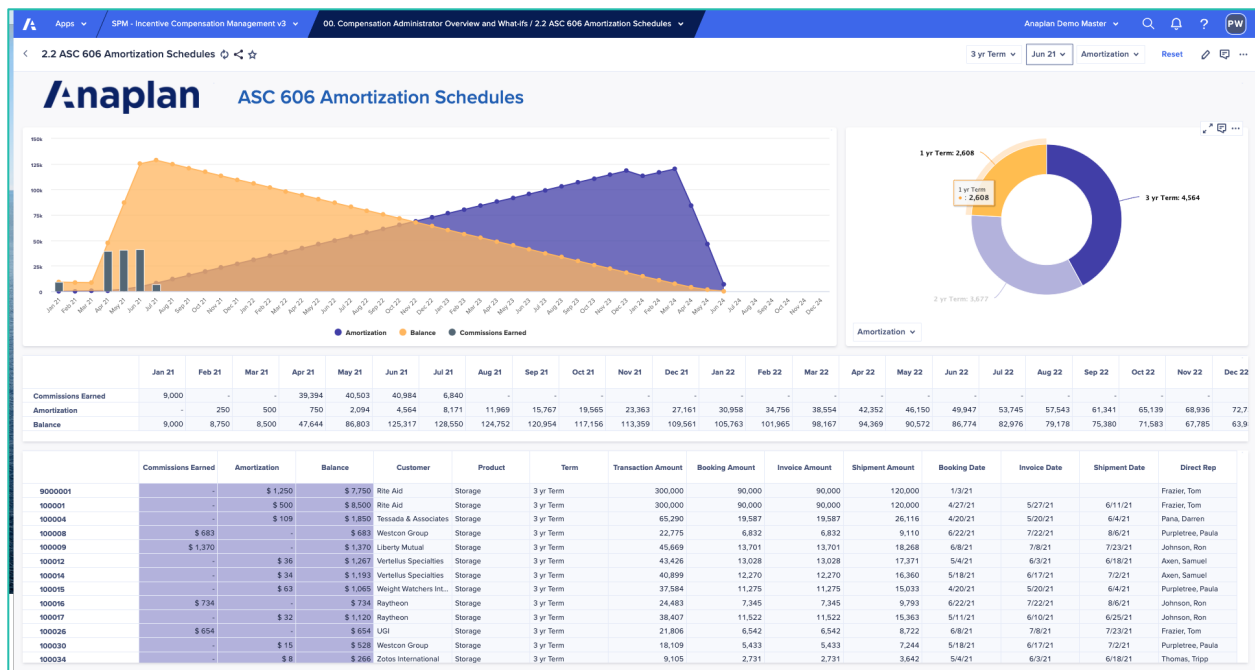
Compensation Administrators are frequently asked to provide commission and bonus accrual information to finance. This dashboard breaks accruals down by plan or across plans and by interval.

It provides debit and credit amounts (accruals and accrual reversals) and data can easily be exported.

Select All Plans or individual plans to view commission accruals and reversing entries across the year.

ASC 606 Amortization

The compensation Administrator can review commission expenses that can be recognized, via the ASC606 law, by month and across all plans in this dashboard.



ASC606 Amortization

Review amortization by contract term and by month or year by using the page selectors or **click the term in the graph**. As commission earnings are recognized each month the balance is updated. Transactions are synchronized below the charts based on term.

Even though commission payments are made when the invoice is billed to or paid by the customer, accounting rules state that payments and related expenses can only be recognized when the service is used. In many cases, services are consumed monthly, for example, software subscription services.

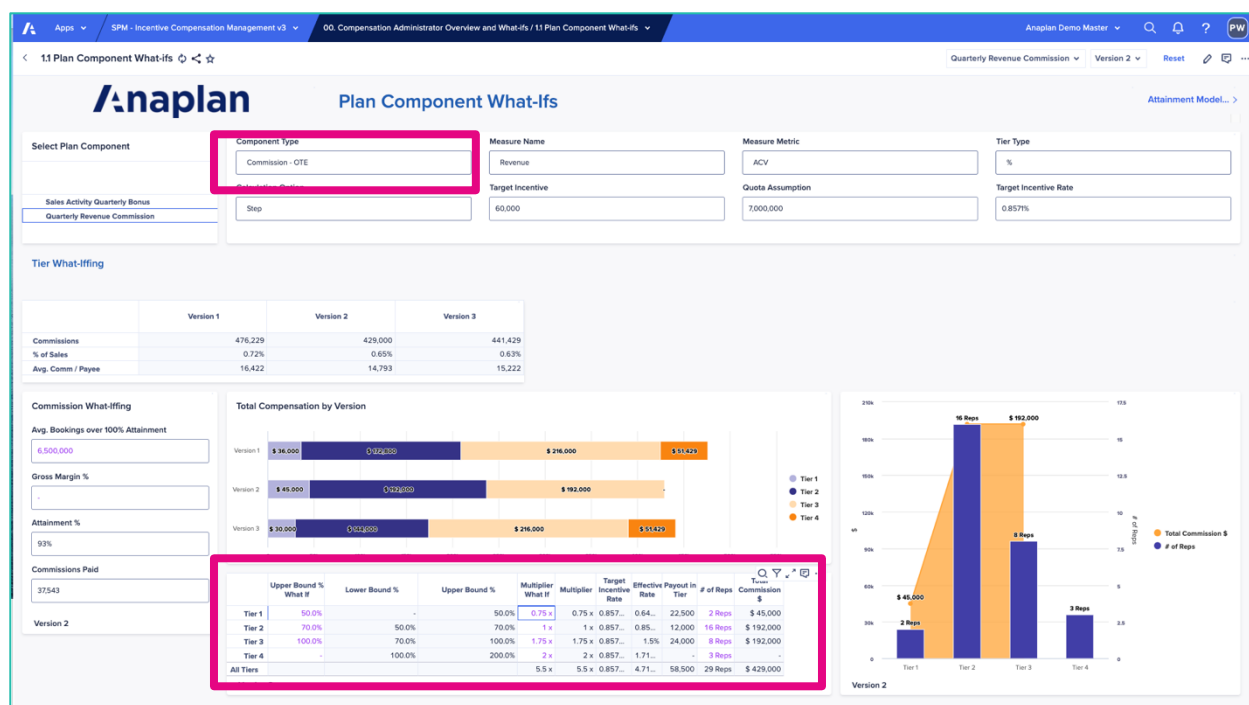
Differentiator

Not found in point solutions.

Plan Component What-if Modeling

This dashboard might be used to model commission expenses during new plan rollouts at the beginning of the year and to track commission expenses during the year. It is especially handy to use when investigating and monitoring seemingly out of control expenses during the year.

Existing and new compensation plan components are used to perform what-if scenario modeling. Updates during what-if comparison does not affect actual plans.



Plan Component What-ifs – Commission OTE component type

Use plan components to perform what-if scenarios. Various assumptions can be adjusted in each version and total commission expense compared across versions.

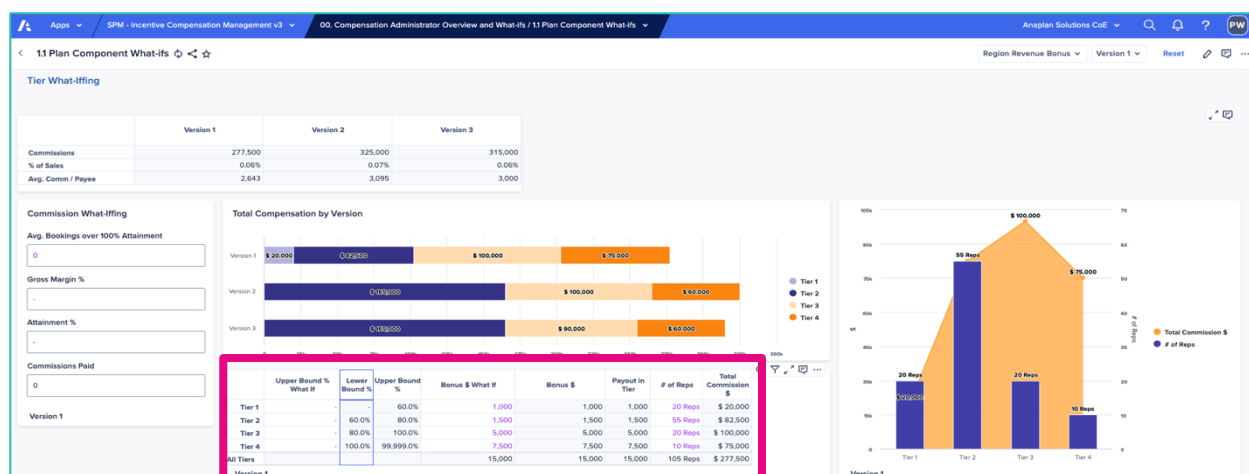
Select a plan component, for example, Quarterly Revenue Attainment. And then from left to right on the screen:

- Change the average **attainment** amount or percent for those reps that achieve over 100% in one or all versions. This value is used for Step and Interpolation rate calculation for the number of reps defined at the tiers at 100% and greater
- Override upper/lower **boundaries** in the rate table if desired
- Modify **multiplier, rate, or bonus amount** depending on the plan components rate table inputs and component type
- Input the **number of reps** on that plan likely to achieve the attainment within each band for a more accurate estimate

Total Commission is calculated based on the rate table boundaries, rates, and number of sales reps for each band. Total potential commission expense is summarized in the grid above the graphs.

Attainment for reps achieving > 100%, rate table boundaries, rates, and number of reps typically achieving each attainment band all have inputs for each version. Versions are used to compare the different inputs and overrides, like scenario comparison.

For product-based plan components, select the plan component, e.g., Product Focus, and override number of units sold, rates per product unit, and number of reps selling each product to compare expenses across versions.



Plan Component What-ifs – Bonus component type

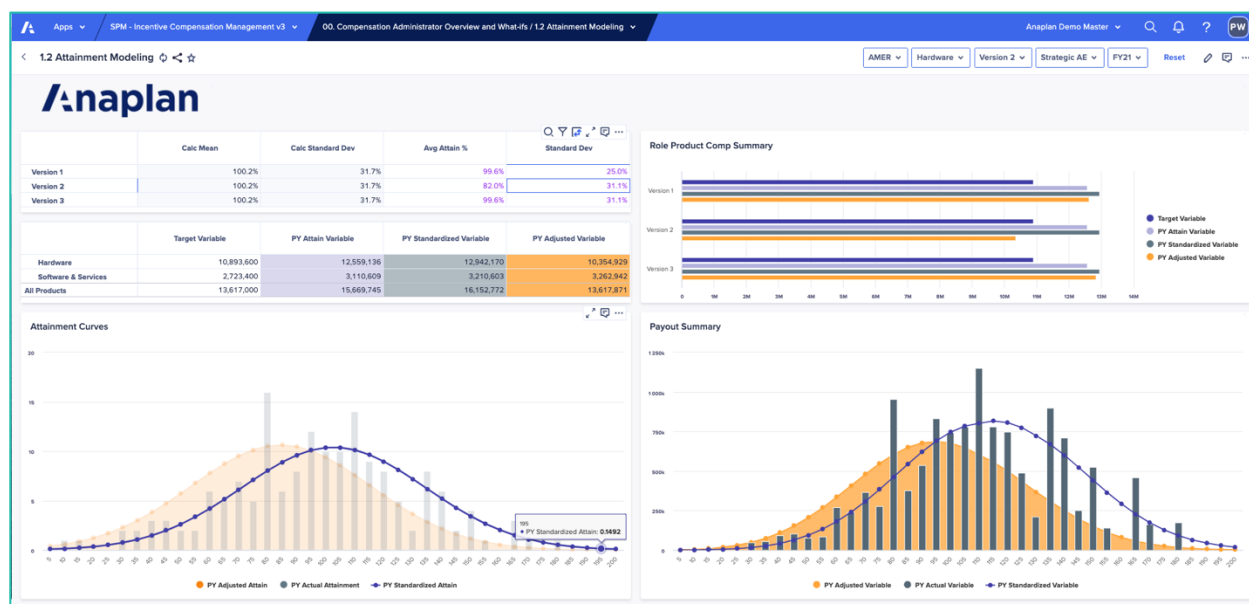
Click the link to **Attainment Modeling**

Differentiator

Not part of any point ICM solution.

Plan Attainment Modeling

Compensation Administrators can model attainment for individual compensation plans and across plans in this dashboard.



Attainment Modeling

Enter and modify assumptions using different dimensions for each version. Compensation roles are used to map and assign compensation plans.

Variable input assumptions are for:

- Average attainment percent
- Standard deviation percent

Dimensions used:

- Area (geographic)
- Compensation role
- Product family
- Time (year)

Automatically review aggregation across dimensions and view potential attainment compared to targets. Compare targets to prior year and adjusted variable attainment to determine the most likely outcome for next year's plans. Set your assumptions by role, area, and product to better **predict volatility** (range of probable payouts at a specific average attainment) and **variance** of possible commission expenses.

Select a Product and a Role to input or edit assumptions for each version. Click or select version to see the chart update for each version's setup.

Differentiator

Not part of any point ICM solution.

Sales Crediting UI and Dashboards

See the separate [Sales Crediting Solution Guide](#) to view all user interface, interaction detail and dashboards.

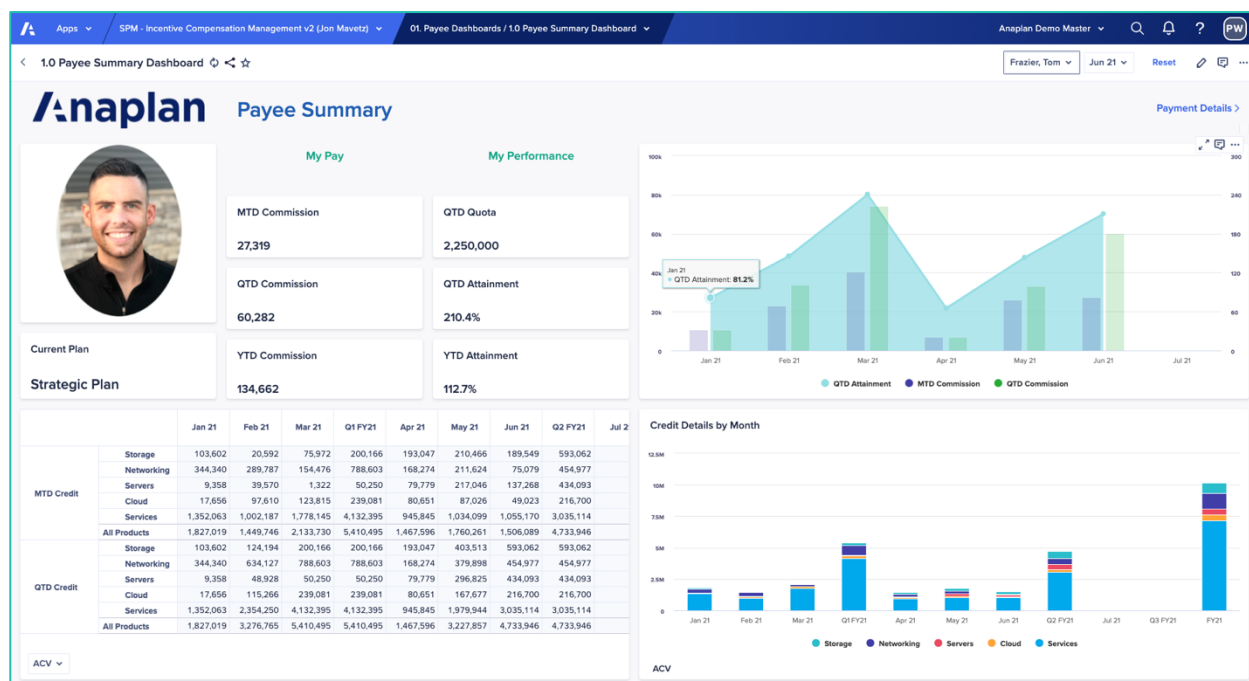
Compensation Plan UI and Dashboards

See the separate [Compensation Plan Solution Guide](#) to view all user interface, the plan wizard, plan test calculation and interaction detail and dashboards.

Sales Rep Dashboards – Reporting and Collaboration

Payee Summary

There are several dashboards created for salespeople. This first dashboard summarizes current interval (month), quarter-to-date, and year-to-date payments and performance metrics.

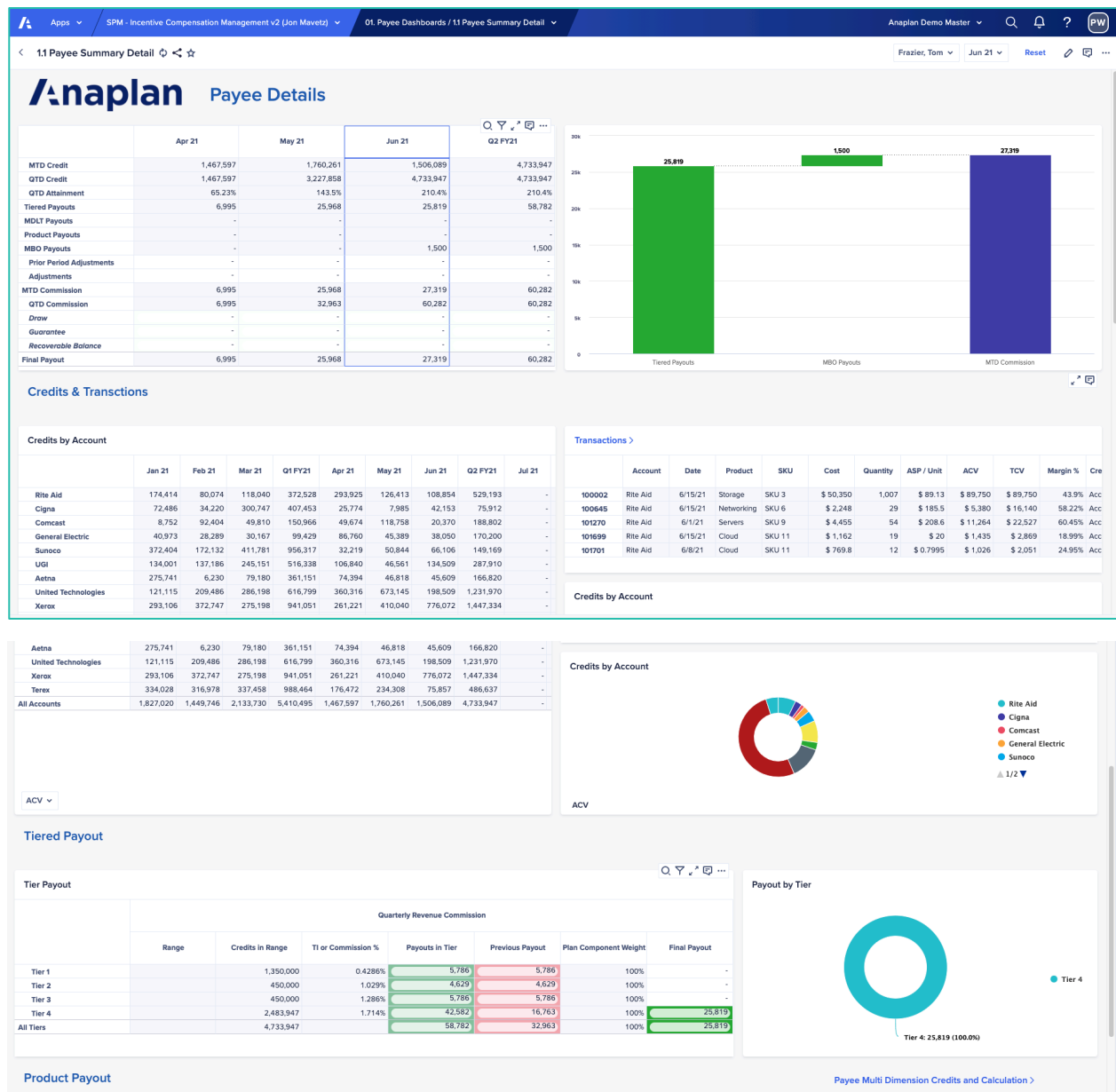


Payee Summary Dashboard

This dashboard displays the most common metrics salespeople need to track at a summary level. Change the **Period** page selector to view payment and attainment performance for different months.

To view payment and credit transaction details **click the Payment Details link**.

Payee Details

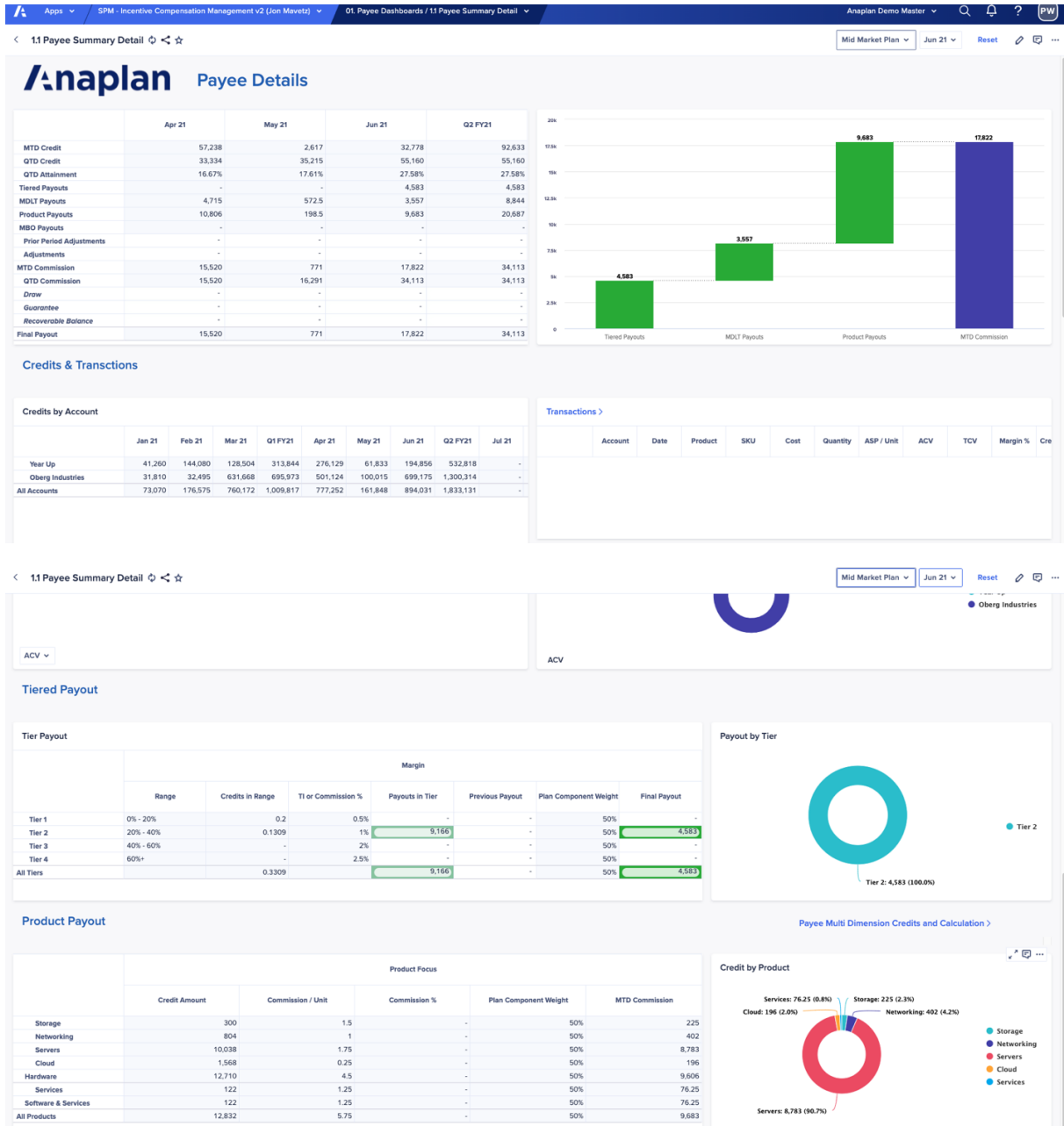


Payee Detail Dashboard – Strategic Sales Plan

The payee detail dashboard displays **critical** information, by period, to the sales rep. It includes different plan and pay component payments such as commission, bonus, MBO, draw, draw recovery, and adjustments. It also includes actual calculations across tiers, if applicable, and rates used for each calculation type. Credit and transaction details can be reviewed and drilled into if needed. Providing payment information at this level helps minimize disputes and reduce shadow accounting.

Select **Tom Frazier** on the strategic comp plan to show the breakdown by tiers for on target earning calculation. Select **June** in the payment grid to populate the tier payout breakdown. The same dashboard is re-used to display detail payment and credit information for other compensation plans. Select the **Mid-Market compensation plan for Regan Brooks** to display different rate tables and rate tier calculations for product and margin.

Commission by product volume for the **Margin** plan component, and a multi-dimensional commission based on term and product volume (units) for the **Product Focus** component, as well as the plan component weight used to calculate commission.



Payee Detail Dashboard – Mid-Market Plan

Drill into the Credit Details link to view credit transaction details if there is any question about how the attainment for the period is determined.

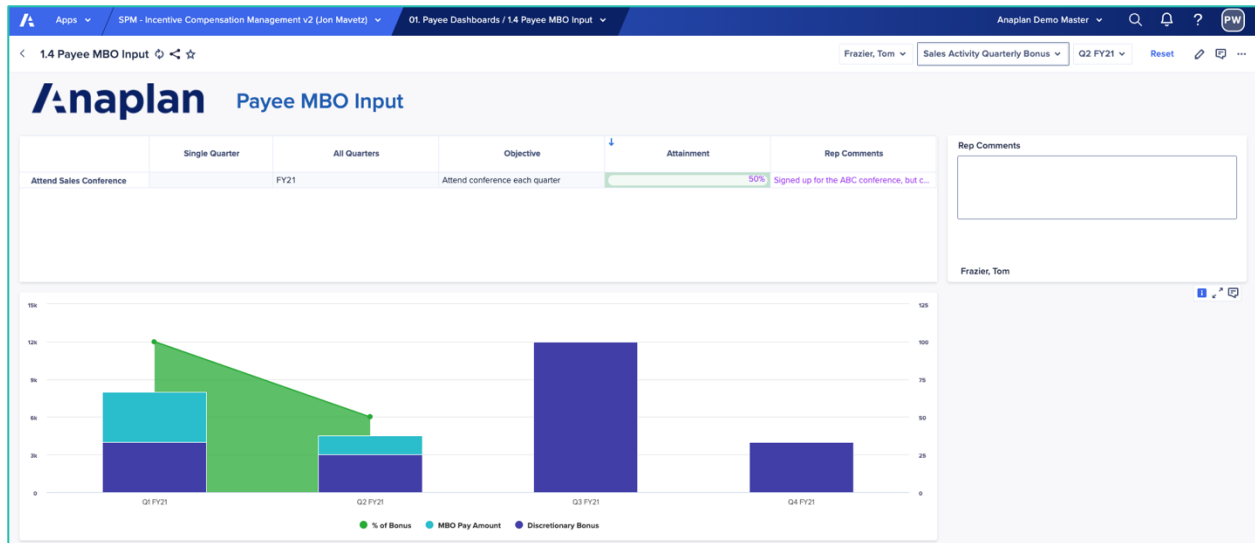
Payee Credit Transaction Details

1.3 Credit Transaction Detail														
Account	Credit Type	Credit Rule	Booking Date	Product	Quantity	Term	ACV	Cost	Credit Split %	Credit Amount \$	Override Split %	Override Credit Amount \$	No Credit?	Final Credit Amount \$
100002	Account	Rite Aid	6/15/21	Storage	1,007	1	89,750	50,350	100%	\$ 89,750	-	-	<input type="checkbox"/>	\$ 89,750
100003	Account	Comcast	6/8/21	Storage	194	1	20,173	9,700	100%	\$ 20,173	-	-	<input type="checkbox"/>	\$ 20,173
100026	Account	UGI	6/8/21	Storage	68	3	7,269	3,400	100%	\$ 7,269	-	-	<input type="checkbox"/>	\$ 7,269
100053	Account	Xerox	6/1/21	Storage	374	1	31,846	18,700	100%	\$ 31,846	-	-	<input type="checkbox"/>	\$ 31,846
100057	Account	Terex	6/8/21	Storage	206	3	16,944	10,300	100%	\$ 16,944	-	-	<input type="checkbox"/>	\$ 16,944
100455	Account	Cigna	6/1/21	Storage	93	2	10,221	4,650	100%	\$ 10,221	-	-	<input type="checkbox"/>	\$ 10,221
100474	Account	UGI	6/1/21	Storage	95	1	9,397	4,750	100%	\$ 9,397	-	-	<input type="checkbox"/>	\$ 9,397
100622	Account	Aetna	6/1/21	Storage	36	3	3,949	1,800	100%	\$ 3,949	-	-	<input type="checkbox"/>	\$ 3,949
100645	Account	Rite Aid	6/15/21	Networking	29	3	5,380	2,248	100%	\$ 5,380	-	-	<input type="checkbox"/>	\$ 5,380
100667	Account	Aetna	6/8/21	Networking	26	3	5,407	2,015	100%	\$ 5,407	-	-	<input type="checkbox"/>	\$ 5,407
100883	Account	Sunoco	6/22/21	Networking	105	3	20,346	8,138	100%	\$ 20,346	-	-	<input type="checkbox"/>	\$ 20,346
101036	Account	Xerox	6/22/21	Networking	63	3	11,157	4,883	100%	\$ 11,157	-	-	<input type="checkbox"/>	\$ 11,157
101085	Account	UGI	6/1/21	Networking	64	3	12,082	4,960	100%	\$ 12,082	-	-	<input type="checkbox"/>	\$ 12,082
101055	Account	Xerox	6/1/21	Networking	99	2	16,742	7,673	100%	\$ 16,742	-	-	<input type="checkbox"/>	\$ 16,742
101268	Account	UGI	6/8/21	Networking	20	2	3,964	1,550	100%	\$ 3,964	-	-	<input type="checkbox"/>	\$ 3,964
101270	Account	Rite Aid	6/1/21	Servers	54	2	11,264	4,455	100%	\$ 11,264	-	-	<input type="checkbox"/>	\$ 11,264
101277	Account	General Electric	6/8/21	Servers	41	2	8,354	3,383	100%	\$ 8,354	-	-	<input type="checkbox"/>	\$ 8,354
101291	Account	Aetna	6/15/21	Servers	25	3	4,680	2,063	100%	\$ 4,680	-	-	<input type="checkbox"/>	\$ 4,680
101303	Account	Xerox	6/1/21	Servers	385	3	59,848	31,763	100%	\$ 59,848	-	-	<input type="checkbox"/>	\$ 59,848
101377	Account	Terex	6/1/21	Servers	32	3	6,421	2,640	100%	\$ 6,421	-	-	<input type="checkbox"/>	\$ 6,421
101610	Account	Terex	6/1/21	Servers	37	3	7,529	3,053	100%	\$ 7,529	-	-	<input type="checkbox"/>	\$ 7,529
101611	Account	UGI	6/1/21	Servers	46	3	9,638	3,795	100%	\$ 9,638	-	-	<input type="checkbox"/>	\$ 9,638
101647	Account	Xerox	6/22/21	Servers	50	2	9,926	4,125	100%	\$ 9,926	-	-	<input type="checkbox"/>	\$ 9,926
101692	Account	UGI	6/8/21	Servers	111	2	19,608	9,158	100%	\$ 19,608	-	-	<input type="checkbox"/>	\$ 19,608
101699	Account	Rite Aid	6/15/21	Cloud	19	2	1,435	1,162	100%	\$ 1,435	-	-	<input type="checkbox"/>	\$ 1,435
101701	Account	Rite Aid	6/8/21	Cloud	12	2	1,026	769.8	100%	\$ 1,026	-	-	<input type="checkbox"/>	\$ 1,026
101721	Account	Sunoco	6/8/21	Cloud	348	1	287.2	208.8	100%	\$ 287	-	-	<input type="checkbox"/>	\$ 287

Payee Credit Details – with filter

Click the Dispute link to navigate to create a new dispute or monitor existing disputes.
Click the **Payee MBO** link to review or input information for current Management by Objectives (MBO)s.

Payee MBO Input



Payee MBO Input

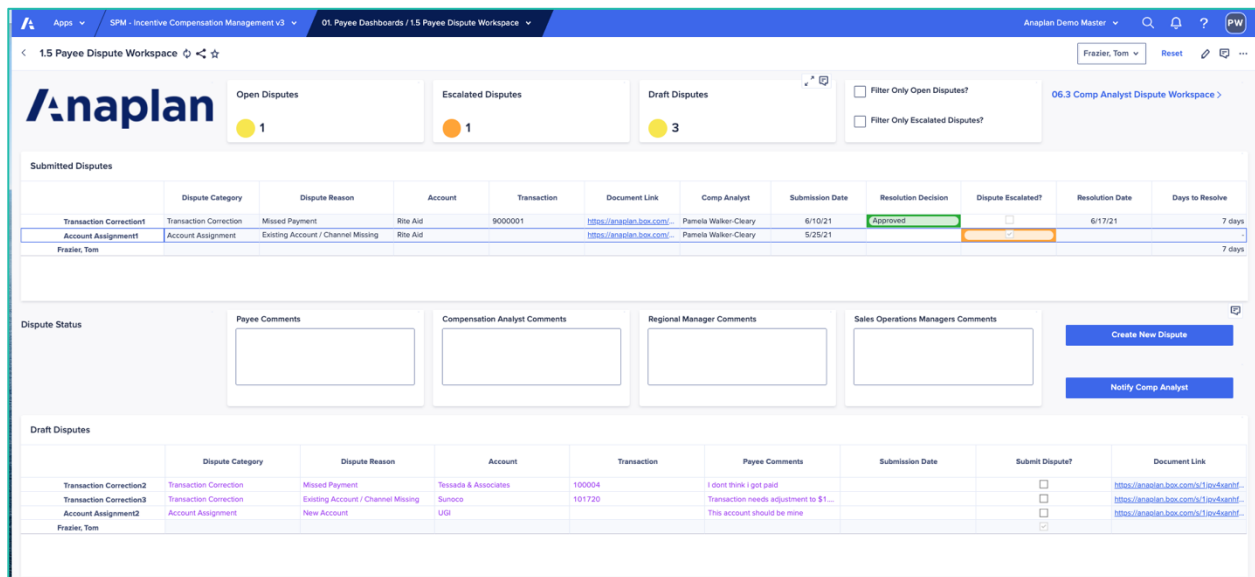
Salespeople have the ability to rate their objectives and comment on any rating. He/she will review the information with his sales manager prior to final submission for payment.

Differentiators

The same dashboard can be configured for different plan component types with different rate tables and only relevant information is displayed.

Payee Disputes and Dynamic Notification

Payees can monitor open disputes, add and see comments, and create disputes in this dashboard.



Selecting a submitted dispute row allows the salesperson to see all relevant comments below.

Click **Create Dispute** to create a new dispute:

Create Dispute

Dispute Category

Find...

Reason

Find...

Account

Find...

Date

mm/dd/yyyy

Transaction

Find...

Comments*

☐ Submit

Cancel

Submit

To submit a dispute, select the draft dispute newly created. Next click the **Submit** check box and the **Notify Comp Analyst** action to submit the dispute notification to the compensation analyst and sales manager during the create process.

Send notification

Verify the context, to identify the recipient.

Recipient context

Transaction Correction2

Recipient

pamela.walkercleary@anaplan.com

Message

A new dispute has been submitted in your assigned territory. Please use above link to navigate to the page and review the dispute

Cancel

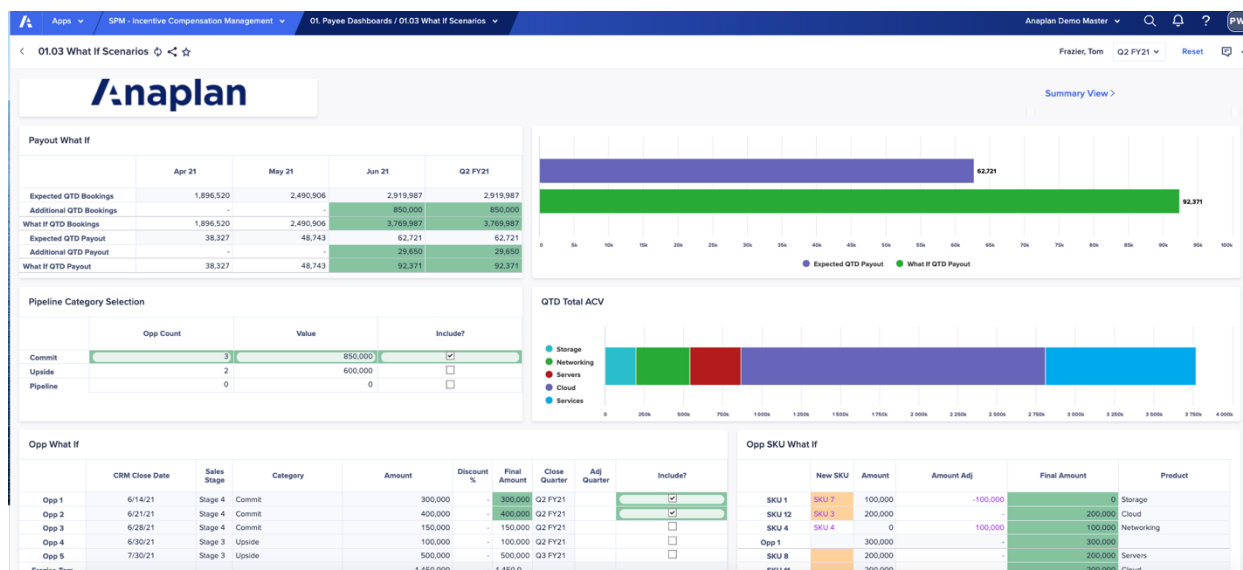
Send

Email notifications are sent to the compensation analyst based on analyst assignment to sub-region that the payee is associated to. All disputes assigned to the analyst and sales manager can be viewed in their own designated workarea.

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Sales Rep Commission Estimator

This dashboard is where the sales rep can perform what-if commission/bonus estimation against his or her sales forecast.



This is one of the most important dashboards available for sales reps. Providing this type of sandbox helps to keep salespeople engaged and focused on the deals that will bring in the highest potential commission and bonus. Potential commission and bonus are calculated using current earnings and attainment, and compensation plan component rates, accelerators, and factors such as target incentive and component weighting.

For Tom Frazier, **select the Commit check box** and note that the top left graph updates to reflect commission for the committed opportunities.

Select the Upside check box to update the graph again.

The top two flags can be un-checked and individual opportunities selected in the table below. Discount amounts can be adjusted in the opportunity grid. Additionally, selecting a single opportunity in the graph displays the corresponding line items where SKU values can be adjusted. Adjustments are displayed at the commission level and in the graph.

Select the first opportunity and **change the discount amount from 20% to 10%** to see the commission graph for the estimate update.

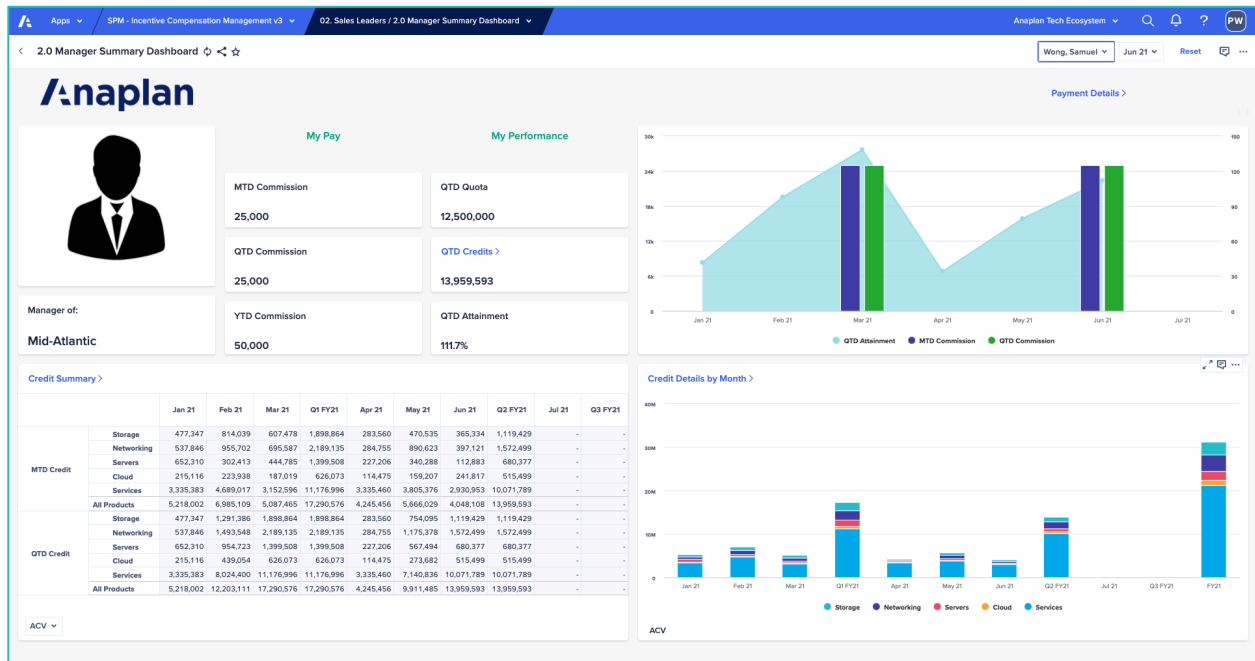
Differentiator

What-if commission estimation includes different factors that influence potential commission Levers such as opportunity stage, margin, and discounts should be included to help optimize future commission results based on compensation plan strategy which reflects overall company strategic objectives.

Sales Manager/Leader Dashboards – Reporting and Collaboration

Sales Manager Summary

There are several dashboards created for Sales Managers/Leaders. This first dashboard summarizes current interval (month), quarter-to-date, and year-to-date payments and performance metrics for sales managers, similar to the Payee Summary Dashboard.

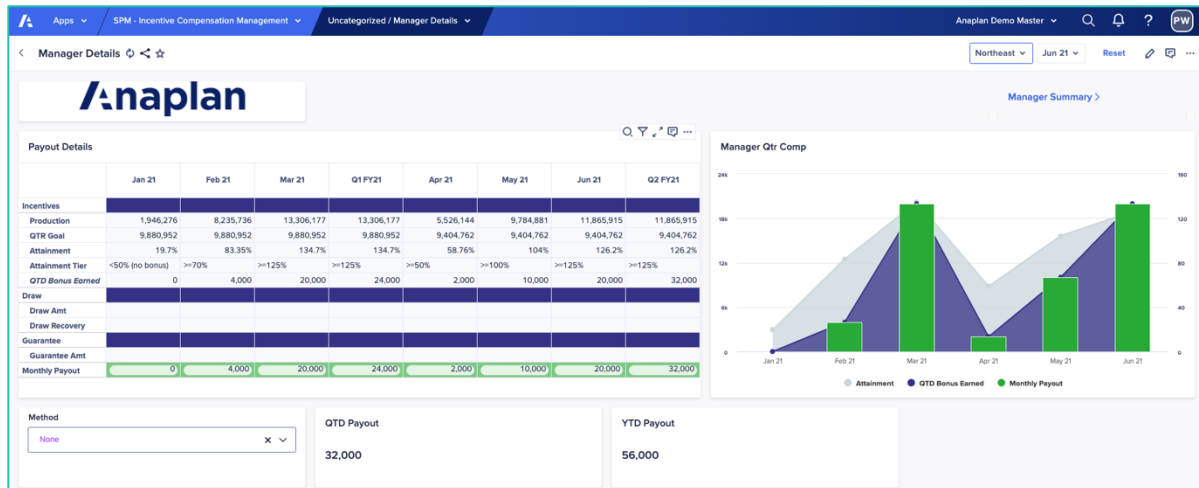


Sales Manager / Leader Summary Dashboard

This dashboard displays the most common metrics salespeople, including sales managers, need to track at a summary level. Change the **Period** page selector to view payment and attainment performance for different months.

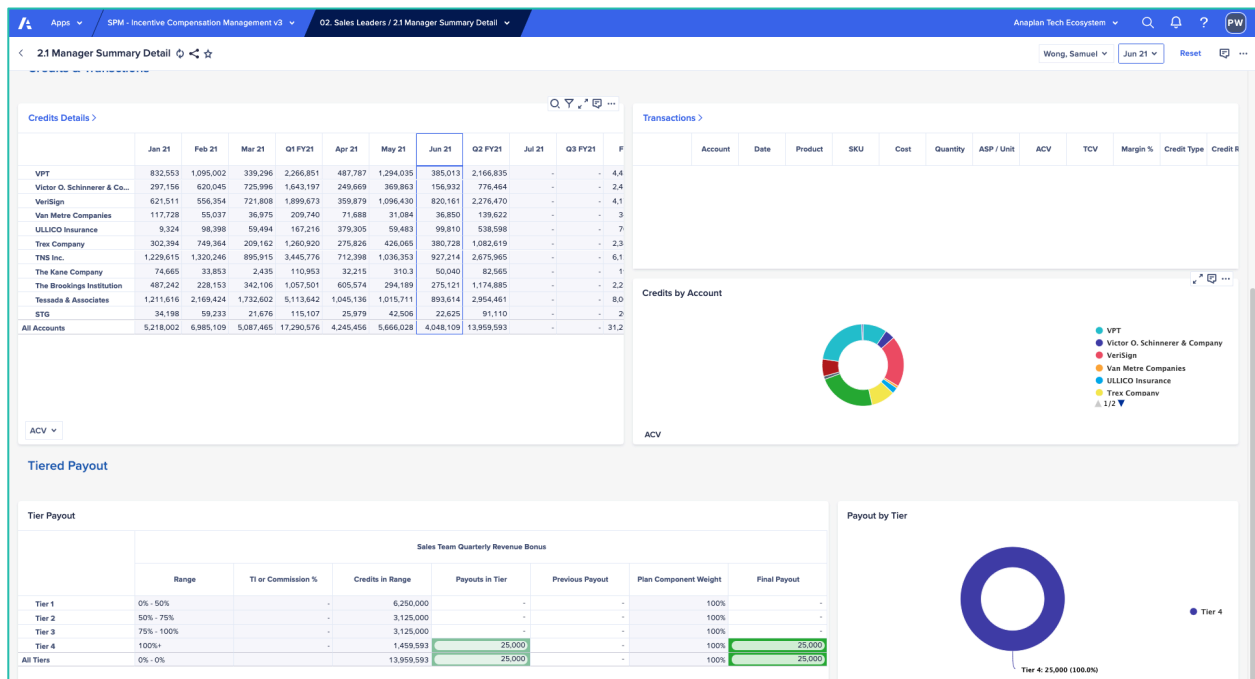
It also includes **alerts** related to open team tasks such as open disputes, and MBOs that need to be reviewed and approved. To view payment and calculation details **click the Payment Details link**.

Sales Manager Details



Sales Manager Detail dashboard

The detail dashboard displays **critical** information, by period, to the sales manager. It includes different plan and pay component payments such as commission, bonus, MBO, draw, draw recovery, and adjustments. It also includes actual calculations across tiers, if applicable, and rates used for each calculation type. Credit and transaction details can be reviewed and drilled into if needed. Providing payment information at this level helps minimize disputes and reduce shadow accounting.

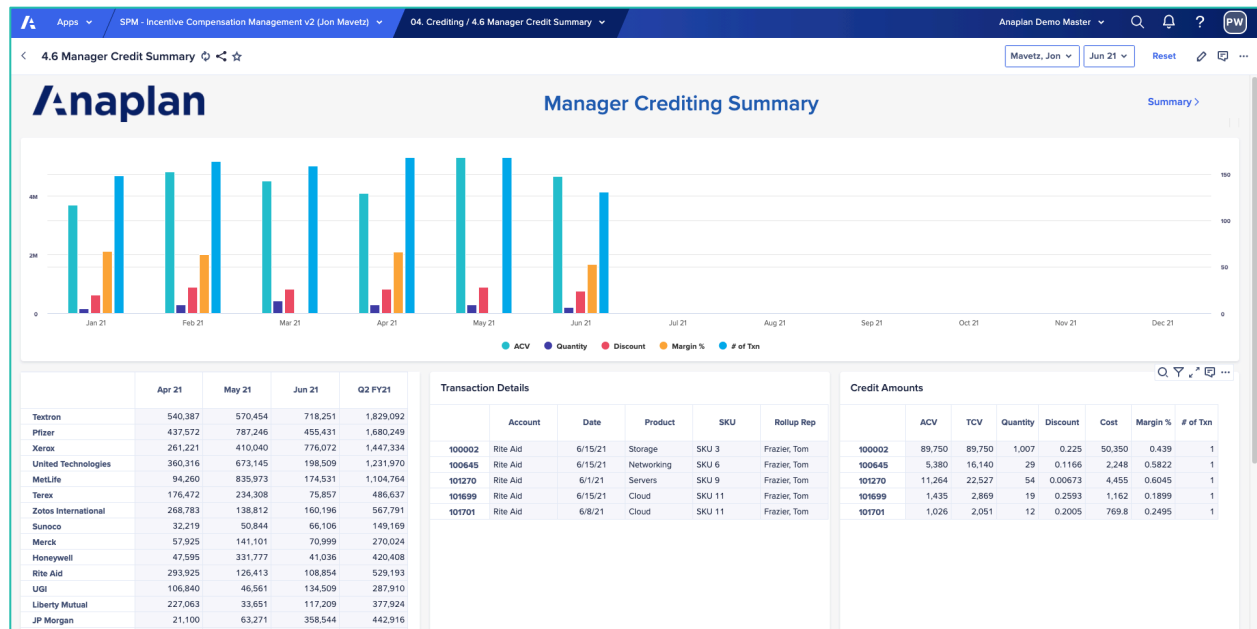


Click the **Crediting Summary** link to view payment transaction details.

Sales Manager Credit Details

This dashboard displays transaction with rollup credit information for each manager.

The detail dashboard includes a link to review credit and transaction details by period. For sales managers, in many cases, credits are rolled up from direct reports.

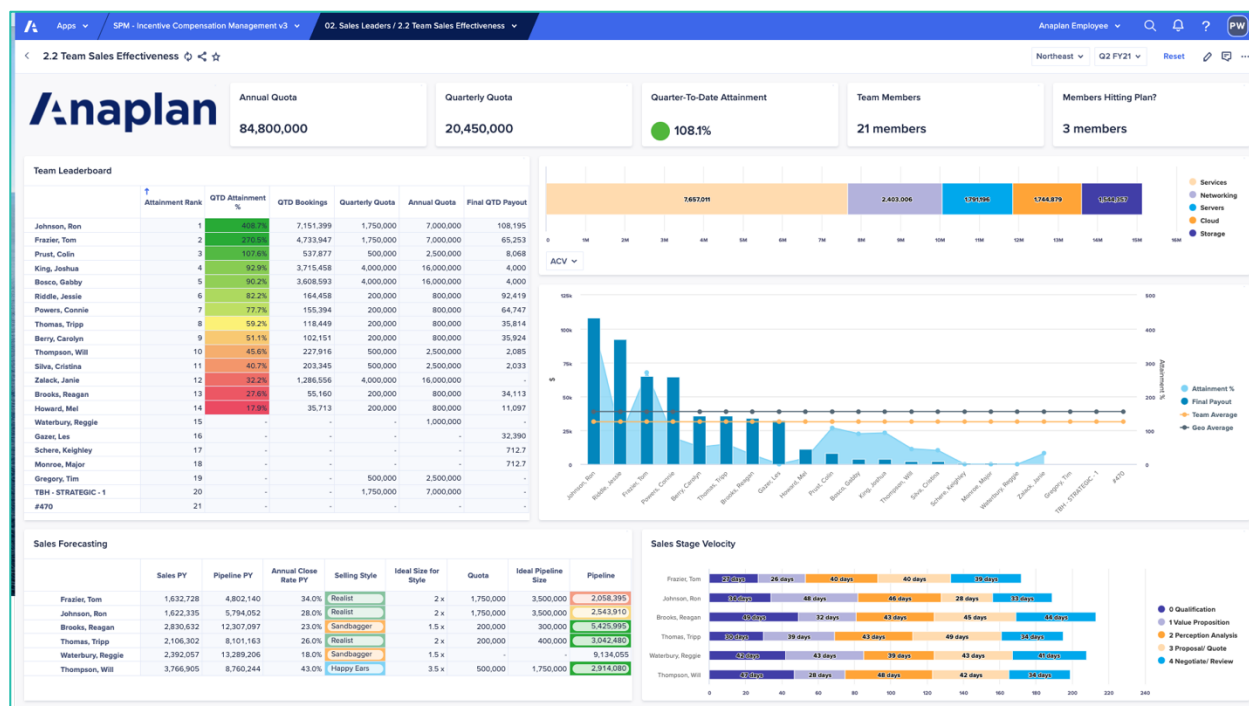


Sales Manager Crediting Summary dashboard

Each sales leader can review team information for his or her direct reports. This includes attainment ranking, current attainment, and trends, along with product trending, close/win rates, etc. This information is crucial to keep individuals on-track, to reducing potential disputes, and potential attrition. **Click the Team Summary** link from the sales manager summary dashboard.

Team Sales Effectiveness Dashboard

Sales managers and leaders use this dashboard to review team and team member metrics.



Team Summary dashboard

Along with individual rep ranking and attainment metrics, important information is provided to sales leaders about close rates and selling style. Sales leaders can utilize these statistics to help coach individuals who may need additional training in specific situations.

Ranking is based on attainment percent. All rep types are included in the ranking, e.g., AEs, SEs, SDR. Only AE metrics are displayed in the bottom grid and velocity chart.

Product trends indicate which plan components may be influencing sales.

Note the Geo Region average as compared to the current team (sub-region). Select a different sub region, e.g., New York, to show KPI and team member changes.

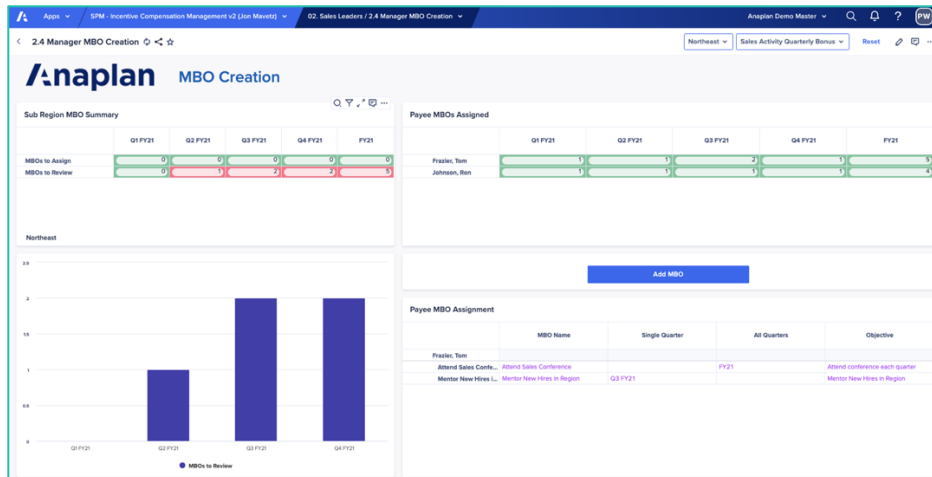
Navigate to the QBR Management Report to dive deeper into current sales and trends.

Differentiator

Team selling metrics (selling style, pipeline velocity) is not usually found in point ICM solution.

Sales Manager MBO Creation

This dashboard displays transaction with rollup credit information for each manager.



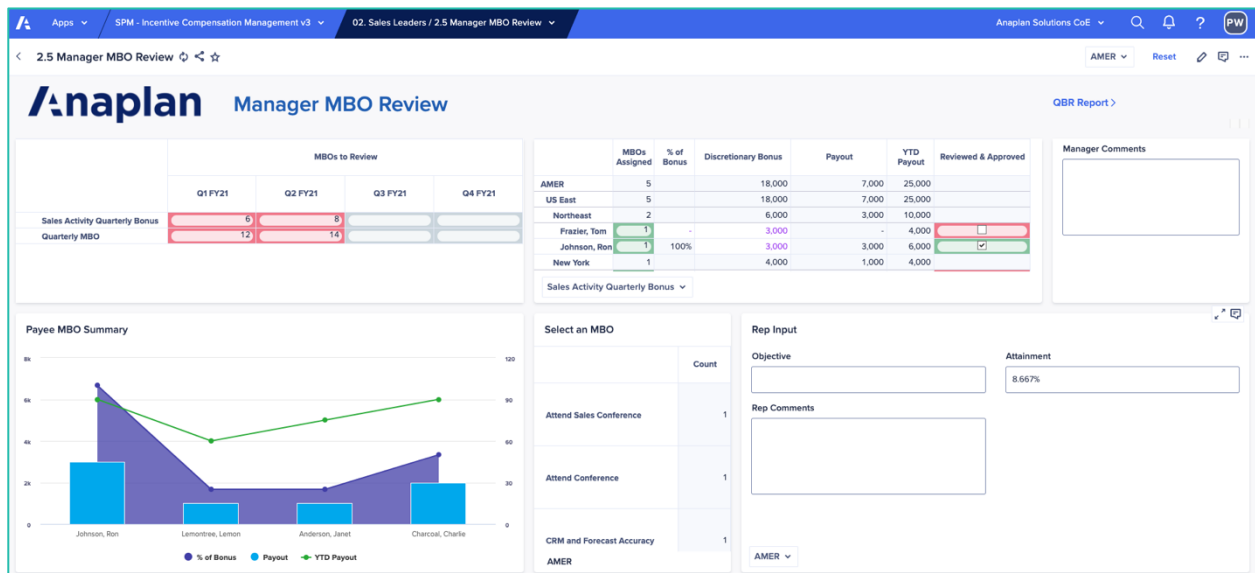
Sales Manager MBO Creation

Sales Manager can create MBOs in this dashboard for his or her team. Additional data may be brought into the solution and be used to calculate the final payout. Or, as in some cases, attainment can be directly inputted by the manager to use for final payout calculations.

MBOs are created for individual reps either per quarter or across all quarters. MBO component types are added to relevant compensation plans.

Sales Manager MBO Review

An additional dashboard is provided for review with the team. Sales Managers can access this dashboard in one-on-ones with individual team members to review and override individual assessments.



MBO Review dashboard

Comments can be captured by sales managers and individuals using the collaboration feature at the MBO level during the review process.

Team Collaboration

Sales Rep Comment

Marketing Comment

CS Comment

Sales Manager Dispute Workspace

Sales Managers can review all disputes for their direct reports in this workarea. Individual payees can be selected, and disputes are filtered by this selection. Dispute status can also be selected.

Open disputes are displayed by default.

Management Reporting

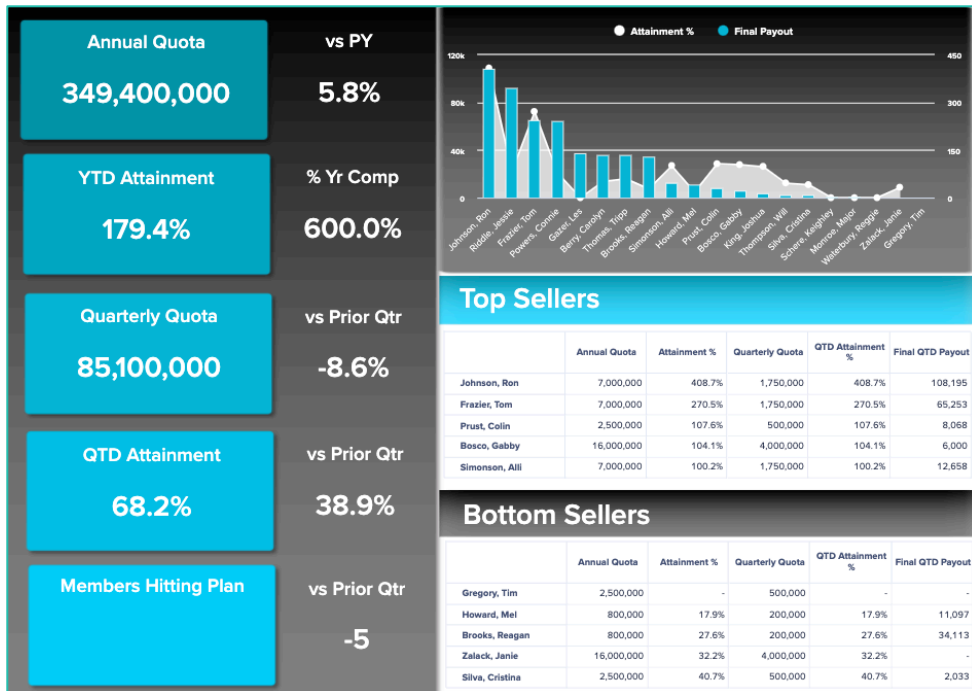
Sales Manager QBR Report

Following is an example of Anaplan's new Management Reporting for Sales Leader Quarterly Business Review.



QBR – cover slide

Multiple pixel perfect “slides” can be included in the management report example.

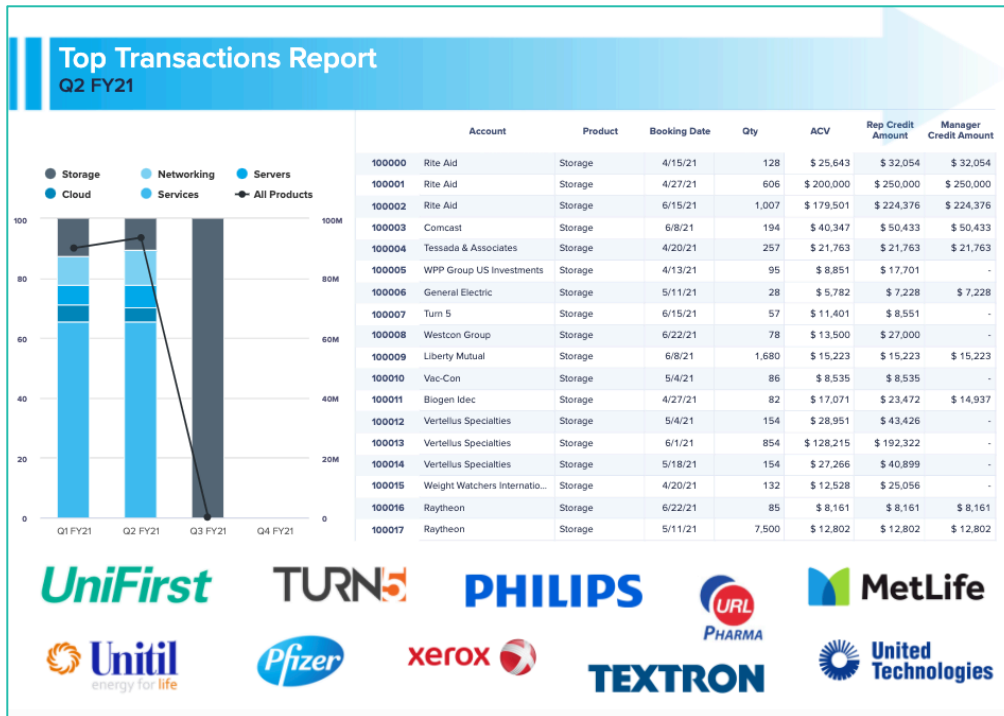


QBR – Team Performance tab

The 2nd tab displays annual, TRD quota and attainment for the select team. It compares this quarter's payments as a percentage of attainment to the last quarter. The right-hand grids list top and bottom sellers. Data is automatically updated based on the quarter.

Select the US East region at the top of the page to view the performance. Content is interactive based on selections,

Click the Present -> icon on the top right of the page to enter presentation mode – like a PowerPoint presentation.



QBR Top Transactions tab

This tab displays a breakdown of the top transactions by account and product. Logos are displayed based on the quarter selected.

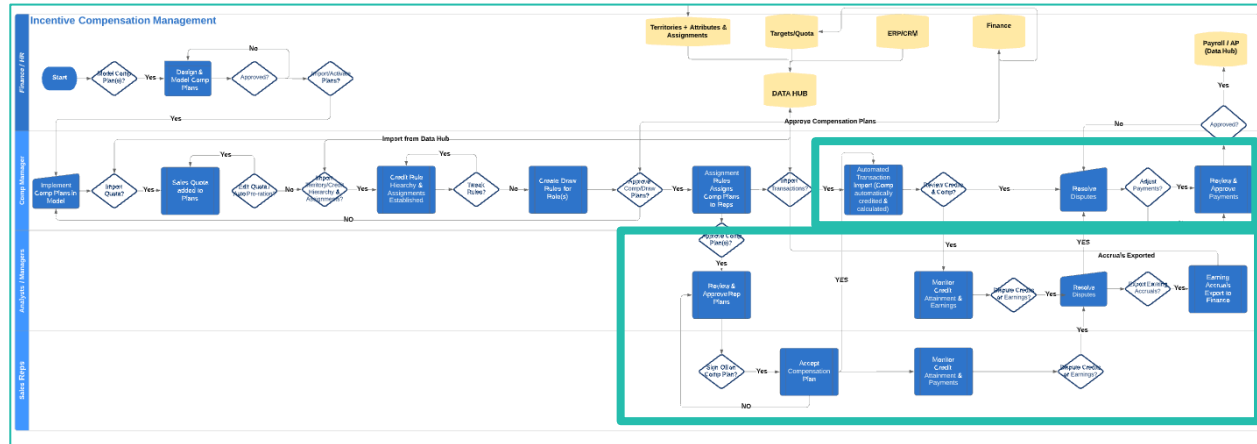
Select the **1st Quarter bar** on the left and next select the **2nd Quarter bar** to show the interaction.

Suggestion

Another good candidate for management reporting is the Payee Compensation Plan Document. Building this report out on the fly using copy and paste between the existing Payee Compensation Plan report and a new management report will also demonstrate how easy these reports are to create and all of the great formatting options included.

Incentives and Rewards Plan Process Flow

Following is the process flow depicted in the Incentive Compensation Management (ICM) model. Reporting and collaboration to manage sales performance/effectiveness, resolve disputes, and approve payments is a large part of the overall ICM process.



L2 ICM Process Flow

The process flow encompasses typical process steps necessary for applying best practices for managing sales performance and effectiveness and collaboration between various ICM Roles.

Typical ICM Roles

Compensation Administrator

The Compensation Administrator (aka: Compensation Manager) is part of the compensation organization, usually found under the umbrella of the Finance or HR department. The Incentive Compensation Manager is responsible for managing the compensation system processes, assignments, exceptions, disputes, and balancing the workload between the department's Incentive Compensation Analysts who report to him or her to produce compensation payments. At the same time this user may be involved in more detail processes to push the compensation payments out to the receiving systems.

Often the Compensation Administrator is involved in modeling and designing compensation plans for the upcoming year. He/she also monitors plan effectiveness and commission expenses throughout the year, and often provides accrual information to finance.

Primary Goals	To manage the processes in the system to import, credit, calculate, adjust, and finally send compensation payments to other systems like payroll, payables or third parties for employees, partners, and others, including customers.
Success Factors	Timely processing of this mission critical data (payments) every period for the department; minimum turn-over for the compensation organization; minimum of disputes from internal and external sales force. Ability to react to management changes in performance strategy with little interaction from IT. Ability to produce Ad-hoc reports used for determining strategy and other organizational scenarios.

Compensation Analyst

The Incentive Compensation Analyst is part of the compensation organization, usually found under the umbrella of the Financial or HR department. The Incentive Compensation Analyst usually reports to an Incentive Compensation Manager who manages the analysts.

The Incentive Compensation Analyst is responsible for maintaining a set of assigned resources, the resources transactions, credits, payments, and adjustments. Some organizations have as many as 300 Comp Analysts who help manage day-to-day tasks necessary to support their sales organization.

Primary Goals	To process incentive compensation for individuals or groups within the product/organization. To research disputes and data related to disputes and resolve in a timely manner. To manage individual compensation plan quota and rates and the overall approval process.
Success Factors	Incentive Payments sent to payment system in a timely manner. Minimum of unresolved or escalated issues within the department.

Payee

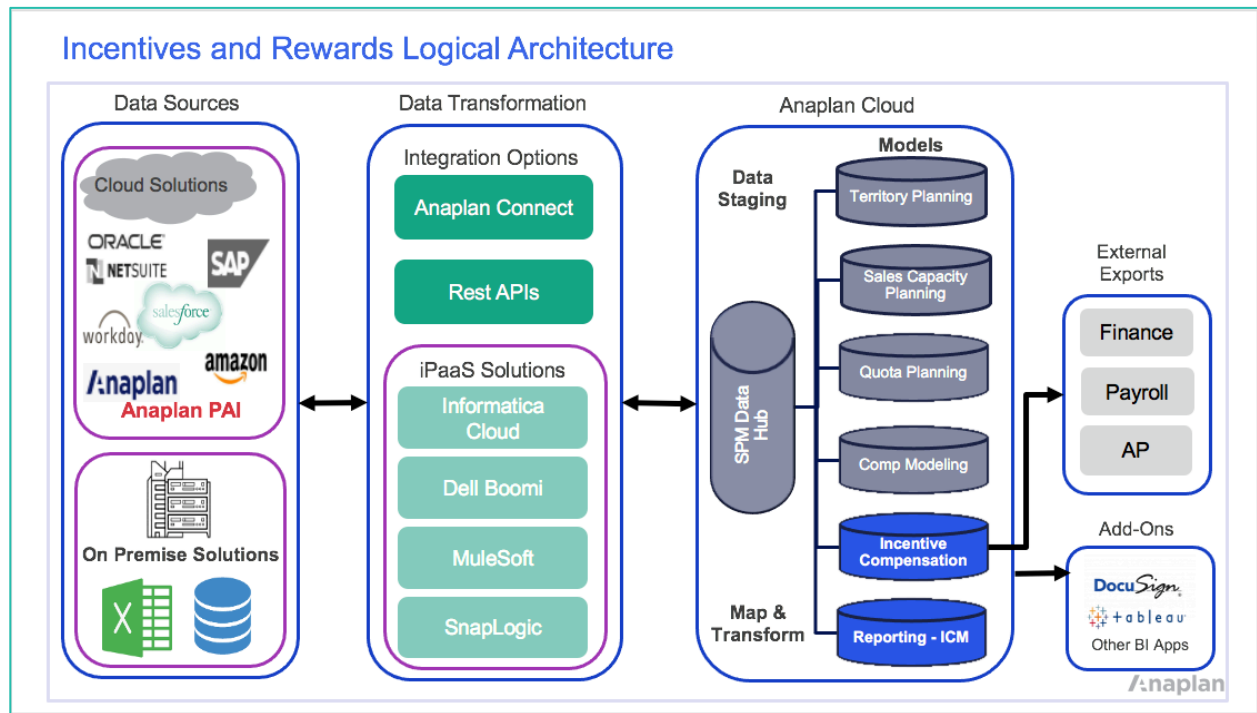
The Payee are those people whose payments are calculated via the system. Payees use reports and dashboards to understand how much they are compensated for commission and bonus payments and to reconcile the commission and attainment received. This user also uses the system to review and accept his or her Compensation Plan, and to create disputes for discrepancies found for payments produced by the system.

Payees are internal and external (e.g., partners, brokers, agents) salespeople, and can also include customers, and vendors.

Primary Goals	To maximize their earning potential or achievement towards compensation and corporate goals. Review and accept Compensation Plan. To review and or validate compensation earnings produced by the system.
Success Factors	Trust in the compensation system – no “shadow accounting” required. Little or no interaction with the compensation department, including the creation of disputes. Ability to use the system to increase his or her sales potential based upon corporate goals and measures.

Anaplan Model

Logical Architecture Flow and Integration



SPM Logical Architecture Diagram

Data comes from many different sources for this solution. It's a best practice and in the long run easier, and less costly, to create a **Data Hub** to move data to and from source and target systems. Data brought into the model also determines the different functionality that can be built to support dashboards and analysis. Importing large amounts of data into a model can lock the model up while processing so it's also an advantage to import with transformations and mapping into a data hub and from there manage much faster imports into the production model.

Additionally, many larger customers split the compensation administrator model from a separate reporting model. This separation helps with concurrency where you may have 100s or 1,000s of salespeople logging onto the system to review their attainment and earning data, their compensation plan information, and other KPI.

It's probable that you will re-arrange assignments differently and use flattened hierarchies within the Incentive Compensation Model so territory to sales crediting may not be a one-to-one module mapping.

Transaction data from ERP, manual transactions, and other transactions such as forecast opportunities, or CRM Activities should be imported into the data hub and Import mapping created within the ICM model to be used for integration automation and ad-hoc imports. Earning results should be exported to the Data Hub. They can be exported from the Data Hub to any 3rd party payment or payroll application.

Typical data imports for creating and assigning compensation plans

- Salespeople imported from CRM or HR
- Salesperson Role, role start/end date (if any) from CRM or HR
- If positions are used, positions and position assignments are imported from HR
- Lists used for comp plan assignments: Compensation Roles, Salespeople, Employee information
- Sales actuals (orders, invoices, payments) are needed to calculate credit attainment which is then used to calculate commission and bonus
- Quota/Targets are needed at a plan component level. These may differ from higher level targets used for quota planning; compensation administrators may need to break quota/targets down by product (family), and by plan component/attainment measure to match to the correct component level defined in compensation plans.
 - Quota and Target Incentive may be individualized by payee
- Other Lists/Dimensions
 - Product Hierarchy (needed for crediting and often compensation plans)
 - Approval and completion status
- Sales and or position hierarchies (used for sales crediting)
 - See the separate [Sales Crediting Solution Guide](#) on Hi Spot for details

To help reduce the size of lists and the overall model do not populate lists with all members if it's not necessary. For example, if you use zip code for credit rules but only need a sub-set for your rules do not import the unneeded zip codes into your list. Or if you need to populate the entire list for use elsewhere in the model, designate a sub-set to be used for rules.

Model Suggestions and Best Practices

Following are some best practice suggestions when building out compensation plans for your incentive compensation solution. There are also user stories available for use as a requirement starting place in the appendix. Stories are a starting place and may need to be modified slightly and reprioritized to fit each customer's specific needs.

Lookup (Mapping) and System Modules

It's a best practice to create system modules that hold **mapping** between transaction attributes and various lists (dimensions) and lookup the values from transactions that are used to define your credit and compensation plan rules. Boolean line items can track the various attributes found for each transaction and credit and referenced in your formula. The use of system modules and boolean line items helps make the model more performant. It also helps keep various formula expressions shorter and easier to maintain.

Types of system and mapping modules used for lookups should include relevant details and will likely consist of the following lists:

- Currency Conversion Rates
 - Could be daily rates if converting per transaction/credit
 - Could require annual or monthly rates for payment conversion to the sales rep's payment currency.
 - Typically plan / quota rates are annual if used
- Employee (code, ID, name, role, role start date, role end date, department, position, manager)

- Multiple records for an individual employee may occur over time as he/she changes roles or moves to different locations
 - Employee ID will likely be needed for mapping for exports to payroll
- Compensation Role (code, role name)
 - Role and employee attributes will be used for mapping plan assignments
- Plan Component Type
- Time Module
- Filters
- Dynamic Access Control (DCA)

See the [Planual](#) located on Anplan Community

♦♦ SYSTEM Modules ♦♦			Not Applicable	Not Applicable
SYS S4 Rep Segment to Role Mapping		Segment	Not Applicable	Not Applicable
SYS Credit Multiplier			Not Applicable	Not Applicable
SYS Transaction ID Filter			Not Applicable	Not Applicable
SYS Images			Not Applicable	Not Applicable
SYS Account Capacity by Role		Role	Not Applicable	Not Applicable
SYS Time Settings			Not Applicable	Not Applicable
FILTER Time			Month	Model Calendar
MAPPING S3 Sub Region → Manager		S3 Sub Region, Role	Not Applicable	Not Applicable
IMPORT Transaction Data		L1 Transaction ID	Not Applicable	Not Applicable
SYS Payee Credit Details Filters			Month	Model Calendar
SYS Manager Credit Details Filters			Month	Model Calendar

Example of system modules

It's typical to capture list attributes in a corresponding list module. For example, a separate module is created to hold transaction attributes based on the transaction code (unique identifier). Transaction data is first imported into a list with the code and corresponding attributes imported into the module. Of course, you'd usually have many more fields on the transaction needed for crediting and reporting purposes. Formula can be used to manage lookups and basic checks while importing data; ideally these checks are performed as data is imported into a data hub.

IMPORT Transaction Data							
Line Item Formula							
check account = Account.Biogen Idec OR account = Account.Revere IT OR account = Account.Aramark OR account = Account.Staples OR account = Account.EMC OR account = Account.Global Partners OR account = Account.TJX OR account = A							
	Formula	Parent	Is Summary	Format	Applies To	Time Scale	Time Range
IMPORT Transaction Data					L1 Transaction ID		
Needs Customer?	IF ISBLANK(LIST L1 Transaction ID'Account) THEN TRUE ELSE FALSE			Boolean	-	Not Applicable	Not Applicable
Customer Code - Data				Text	-	Not Applicable	Not Applicable
Product - Data				P2 Product	-	Not Applicable	Not Applicable
SKU - Data				P3 SKU	-	Not Applicable	Not Applicable
Booking Date - Data				Date	-	Not Applicable	Not Applicable
Invoice Date - Data				Date	-	Not Applicable	Not Applicable
Shipment Date - Data				Date	-	Not Applicable	Not Applicable
Extended Net Price - Data				Number	-	Not Applicable	Not Applicable
Quantity - Data				Number	-	Not Applicable	Not Applicable
ASPI/Unit - Data				Number	-	Not Applicable	Not Applicable
Discount - Data				Number	-	Not Applicable	Not Applicable
Cost - Data				Number	-	Not Applicable	Not Applicable
Term (Y) - Data				Number	-	Not Applicable	Not Applicable
Service Obligation - Data				Number	-	Not Applicable	Not Applicable
Zip Code - Data				Zip Code	-	Not Applicable	Not Applicable
Industry				L1 Industry	-	Not Applicable	Not Applicable
Segment				Segment	-	Not Applicable	Not Applicable
account	FINDITEM(Account, 'Customer Code - Data')			Account	-	Not Applicable	Not Applicable
check	account = Account.Biogen Idec OR account = Account.Revere IT OR account = A			Boolean	-	Not Applicable	Not Applicable
Sub Region O3				S3 Sub Region	-	Not Applicable	Not Applicable
ORIGINAL Sub Region O3				S3 Sub Region	-	Not Applicable	Not Applicable

Transaction Import Module with data checks example

Pre-defined filters are also commonly defined in system modules. The following are pre-defined transaction search filters used in the transaction and credit dashboards

SYS Transaction ID Filter						
Line Item Formula						
Account						
	Formula	Parent	Is Summary	Format	Applies To	Time Scale
SYS Transaction ID Filter						Not Applicable
Account				Account	-	Not Applicable
Transaction ID				L1 Transaction	-	Not Applicable
Month				Month	-	Not Applicable
Sub Region				S3 Sub Region	-	Not Applicable
Product				P2 Product	-	Not Applicable
Industry				L1 Industry	-	Not Applicable
Zip Code				Zip Code	-	Not Applicable
Start Date				Date	-	Not Applicable
End Date				Date	-	Not Applicable

Transaction search filter module example

Time Settings System Module

Sales crediting and compensation plan calculations are typically processed and paid by interval. For example, commission might be processed and paid weekly, monthly, or quarterly or a combination of all three intervals. Bonus type components might be processed monthly and paid quarterly, and semi-annually. Most point solutions include the concept of a “period” which is defined by the customer and typically thought of as open or closed. **Open periods** are where processing occurs, and payments exported out for the current period. Closed periods (user sets the status) are not re-processed although prior period adjustments might be made against “closed” period transactions, credits, and payments, and carried forward to the current period to be paid.

To track what is open and current, a Time Settings module can and should be created to define variables such as current period as it is defined and set in the model calendar and to track active employees within each week or month. Track employee by the smallest payment interval among all compensation plans. You’ll want to surface current period in the UI so the compensation administrator has easy access to update the calendar period to the current period and to close the previous period if utilizing this concept.

SYS Time Settings						
Line Item Formula						
Prior Month Current Date						
	Formula	Parent	Is Summary	Format	Applies To	Time Scale
SYS Time Settings						Not Applicable
Prior Month Current Date				Date	-	Not Applicable
Prior Month	Current Month - 1			Month	-	Not Applicable
Current Date				Date	-	Not Applicable
Current Month				Month	-	Not Applicable
Current Year	PARENT(Current Month)			Year	-	Not Applicable
Last Day Current Year	END(Current Year)			Date	-	Not Applicable
Last Day of Year				Month	-	Not Applicable
Last Month of Year	PERIOD(END(Current Year))			Month	-	Not Applicable
Mass Plan Change Date				Date	-	Not Applicable

Time Setting module example

Reporting Metrics

Ultimately, it is the association of performance measure to plan component that should determine whether a credit is eligible for calculation within the plan. Payee credit results are connected to plan components, via their measures and measure metrics when compensation plans are assigned to payees.

Tagging credits with measures can be accomplished by adding performance measure line items to credit rule criteria and including the measure value when generating credit transactions. Performance measures can then be associated to plan components and used to determine eligible credit attainment used for calculating commission or bonus.

Depending upon component calculation rules you might need to apply rates to a summary attainment amount for the interval, or rates might be applied to individual credit attainment transaction lines. Generally, but not always, if using attainment percent (credited attainment / quota) you'll be applying rates against the aggregated credit amount. If you capture the performance measure against individual credit attainment it is easier to summarize attainment as needed for each measure that is associated to plan components. However, to help with model size and performance, try to summarize attainment by measure whenever possible to use to calculate payments. You may have credits that apply to multiple measures and one measure applied to multiple plan components.

Line-Item Subset Example & Payee Payment Conversion Setup

A great way to consolidate credit results for rep attainment calculation is to create a **Line-Item Subset (LIS)**. These *lists* allow you to gather line items for one or more modules into a new list that can easily be referred to by regular module line items. Use the **Collect formula** to reference the line-item subset data.

Line-Item Subsets can also be used to convert attainment and earnings (payments) to different currencies for payees. Some implementations may only require final summary payments be converted and others may need to convert all metrics to different currencies. Typically, conversion is done at the payee level. Quite often a “reporting” currency will be established which means all metrics need to be converted to this currency type, for example, USD, and attainment and earnings also converted to the payee’s payment currency.

In this model payee’s local payment current is setup in the LIST S4 Payee module.

LIST S4 Payee									
Local Currency									
Alerts	S4 Payee	S4 Payee Code	Payee Roster	Rep Roster	Local Currency	S3 Sub Region	S2 Region	S1 Geo	
	Frazier, Tom	00100001	Frazier, Tom	Frazier, Tom	USD	Northeast	US East	AMER	
	Johnson, Ron	00100002	Johnson, Ron	Johnson, Ron	CAD	Northeast	US East	AMER	
	Brooks, Reagan	001008	Brooks, Reagan	Brooks, Reagan	USD	Northeast	US East	AMER	
	Thomas, Tripp	001009	Thomas, Tripp	Thomas, Tripp	AUD	Northeast	US East	AMER	
New Employee	Waterbury, Reggie	001002	Waterbury, Reg	Waterbury, Reg	USD	Northeast	US East	AMER	
	Bosco, Gabby	50000249	Bosco, Gabby		USD	Northeast	US East	AMER	
	King, Joshua	50000250	King, Joshua		CAD	Northeast	US East	AMER	
	Zalack, Janie	500001	Zalack, Janie		USD	Northeast	US East	AMER	
	Gazer, Les	500003	Geyer, Les		USD	Northeast	US East	AMER	
	Schere, Keiblev	500004	Schere, Keiblev		USD	Northeast	US East	AMER	

LIST S4 Payee

Currency conversion rates are maintained in the Currency FX module.

Currency Translation												
to USD												
Currency Translation	to USD											
	Jan 21	Feb 21	Mar 21	Q1 FY21	Apr 21	May 21	Jun 21	Q2 FY21	Jul 21	Aug 21	Sep 21	Q3 FY21
USD	1	1	1	3	1	1	1	3	1	1	1	3
CAD	0.7858	0.7874	0.7953	2.369	0.7992	0.8241	0.8182	2.442	0.7993	0.7993	0.7993	2.398
AED	0	0	0	0	0	0	0	0	0	0	0	0
ALL	0	0	0	0	0	0	0	0	0	0	0	0
AOA	0	0	0	0	0	0	0	0	0	0	0	0
ARS	0	0	0	0	0	0	0	0	0	0	0	0
AUD	0.7718	0.7752	0.7708	2.318	0.7691	0.7759	0.7644	2.309	0.7436	0.7436	0.7436	2.231
AZN	0	0	0	0	0	0	0	0	0	0	0	0
BAM	0	0	0	0	0	0	0	0	0	0	0	0
BBT	0	0	0	0	0	0	0	0	0	0	0	0
BDT	0	0	0	0	0	0	0	0	0	0	0	0
BGN	0	0	0	0	0	0	0	0	0	0	0	0
BHD	0	0	0	0	0	0	0	0	0	0	0	0

Currency Translation module

It's a good idea to include future conversion rates based on the last current month's rate and then replace each month's rate with an actual via automation. This way if calculating future earnings, you will always have a converted number. This is also useful for providing annual what-if numbers as well as accruals.

Monthly Payout Setup												
Local Pay												
USD Pay / Currency Translation to USD[LOOKUP: Currency]												
Monthly Payout Setup	Actual	Jun 21										
	Period	Payout Date	S4 Payee	Payee ID	Currency	Role	Plan	Target Incentive	YTD USD Pay	USD Pay	Local Pay	T. Ince
Frazier, Tom	Jun 21	6/30/2021	Frazier, Tom	00100001	USD	Strategic AE	Strategic Plan	\$ 120,000	\$ 144,605	\$ 27,319	27,319	
Johnson, Ron	Jun 21	6/30/2021	Johnson, Ron	00100002	CAD	Strategic AE	Strategic Plan	\$ 120,000	\$ 190,373	\$ 43,180	52,777	
Brooks, Reagan	Jun 21	6/30/2021	Brooks, Reagan	001008	USD	Mid-Market AE	Mid Market Plan	\$ 120,000	\$ 64,318	\$ 17,822	17,822	
Thomas, Tripp	Jun 21	6/30/2021	Thomas, Tripp	001009	AUD	Mid-Market AE	Mid Market Plan	\$ 120,000	\$ 120,816	\$ 16,874	22,074	
Waterbury, Reggie	Jun 21	6/30/2021	Waterbury, Reg	001002	USD	Enterprise AE	Enterprise Plan	\$ 140,000	-	-	-	
Bosco, Gabby	Jun 21	6/30/2021	Bosco, Gabby	50000249	USD	General Overlay	General Overlay	-	\$ 6,000	\$ 6,000	6,000	
King, Joshua	Jun 21	6/30/2021	King, Joshua	50000250	CAD	General Overlay	General Overlay	-	\$ 10,000	\$ 4,000	4,889	
Zalack, Janie	Jun 21	6/30/2021	Zalack, Janie	500001	USD	General Overlay	General Overlay	-	-	-	-	
Gazer, Les	Jun 21	6/30/2021	Gazer, Les	500003	USD	Service Special	Services Specis	-	\$ 52,340	\$ 37,240	37,240	
Schere, Keighley	Jun 21	6/30/2021	Schere, Keighley	500004	USD	Storage Special	Hardware Spec	-	\$ 5,337	\$ 713	713	
Monroe, Major	Jun 21	6/30/2021	Monroe, Major	500005	USD	Network Special	Hardware Spec	-	\$ 5,377	\$ 713	713	
Thompson, Will	Jun 21	6/30/2021	Thompson, Will	001003	USD	Enterprise AE	Enterprise Plan	\$ 140,000	\$ 25,456	\$ 1,000	1,000	
Berry, Carolyn	Jun 21	6/30/2021	Berry, Carolyn	003722	USD	Mid-Market AE	Mid Market Plan	\$ 120,000	\$ 177,413	\$ 19,921	19,921	
Howard, Mel	Jun 21	6/30/2021	Howard, Mel	003805	USD	Mid-Market AE	Mid Market Plan	\$ 120,000	\$ 26,560	\$ 8,104	8,104	
Powers, Connie	Jun 21	6/30/2021	Powers, Connie	003884	USD	Mid-Market AE	Mid Market Plan	\$ 120,000	\$ 148,583	\$ 32,386	32,386	
Riddle, Jessie	Jun 21	6/30/2021	Riddle, Jessie	003895	USD	Mid-Market AE	Mid Market Plan	\$ 120,000	\$ 104,278	\$ 45,237	45,237	

Finally, the local payment is calculated using the currency translation module's rate applied to the USD Reporting currency value using the currency code, payee, and month.

Disputes – Dynamic Notification Setup

Compensation analyst notifications are dynamically generated and sent to the designated people based on list and sales region to analyst association, and the Notify Action created in the page. In this model we have designated several comp analysts. Each of those analysts are associated to a sub-region in the Analyst List Module. When a dispute is created (numbered list) then a LOOKUP is done to map the payee's sub-region to the comp analyst's assigned sub-region to find the Compensation Analyst.

S3 Comp Analyst

Tree View **Grid View** Properties Subsets Configure

View Import... Export... Insert... Delete... Move... Refresh

	Parent	Code	Role	Display Name
Pamela Walker-Cleary	Greg Miller	Pamela Walker-Cleary	Comp Analyst	Pamela Walker-Cleary
Erik Bangsund	Greg Miller	Erik Bangsund	Comp Analyst	Erik Bangsund
Josh Clegg	Greg Miller	Josh Clegg	Comp Analyst	Josh Clegg
Greg Miller	Drew Olmsted	US East Comp		
#2	Drew Olmsted	US West Comp		
#3	Drew Olmsted	US South Comp		
#4	Drew Olmsted	US Central Comp		
Drew Olmsted	All	AMER Comp		
All				

LIST S3 Comp Analyst module

The S3 Comp Analyst list is the child of the S2 Comp Administrator List. Three analyst rollup (report to) Greg Miller who is a Comp Admin.

The S3 Sub Region list Module is where the Analysts are mapped to each sub region. Individual analysts can be mapped to more than one sub region.

LIST S3 Sub Region x LIST S3 Comp Analyst x

View Edit Format Data

S3 Sub Region ITEM('S3 Sub Region')

LIST S3 Sub Region

	S3 Sub Region	S3 Comp Analyst
Northeast	Northeast	Pamela Walker-Cleary
New York	New York	Erik Bangsund
Mid-Atlantic	Mid-Atlantic	Josh Clegg
US East		
Atlantic Coast	Atlantic Coast	
Southeast	Southeast	
Texas	Texas	
US South		
Rust Belt	Rust Belt	
Midwest	Midwest	
Plains	Plains	
US Central		
Southwest	Southwest	
California	California	
Northwest	Northwest	
US West		
AMER		

LIST S3 Sub Region module

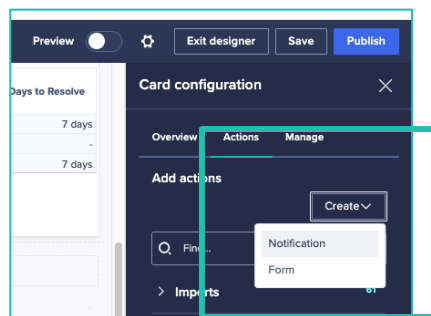
The sales rep dispute module maps the analyst to the payee based on the analyst's sub-region assignment using a lookup.

Comp Analyst	Comp Analyst Email	S3 Sub Region	Submitted?	In Process	Approved	Rejected	Approved Filter	Rejected Filter	Inprocess Filter	==IND==	Submit Comments Opposite?	S3 Sub Region
Transaction Correction1	Pamela Walker- pamela.walkerc	Northeast	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			Northeast
Account Assignment1	Pamela Walker- pamela.walkerc	Northeast	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			Northeast
Transaction Correction2	Pamela Walker- pamela.walkerc	Northeast	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			Northeast
Transaction Correction3	Pamela Walker- pamela.walkerc	Northeast	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			Northeast
Account Assignment2	Pamela Walker- pamela.walkerc	Northeast	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			Northeast
Frazier, Tom												
Transaction Correction1	Pamela Walker- pamela.walkerc	Northeast	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			Northeast
Transaction Correction2	Pamela Walker- pamela.walkerc	Northeast	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			Northeast
Johnson, Ron												
Brooks, Reagan												
Plan Correction1	Pamela Walker- pamela.walkerc	Northeast	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			Northeast
Thomas, Tripp												
Waterbury, Reggie												
Bosco, Gabby												
King, Joshua												

Rep Dispute Tracking module

An email is sent, with a pre-configured message to the dispute's analyst when the **Notify Comp Analyst** action is clicked/run.

To create a notification action, drag an "Action" **card** onto the page, and click configure. In the Action tab select Create and Notification.



Configure the notification. Add a title, description, select the page you want the email receiver to go to, and add the email content.

Notification designer

Name
Notify Analyst of Dispute

Links to
6.2 Comp Analyst Dispute Worksp...

Title
Notify Analyst of Dispute

Message
A new dispute has been created and assigned to you. Click the page link to review the dispute.\$\$\$\$

EMAIL

You received a new notification

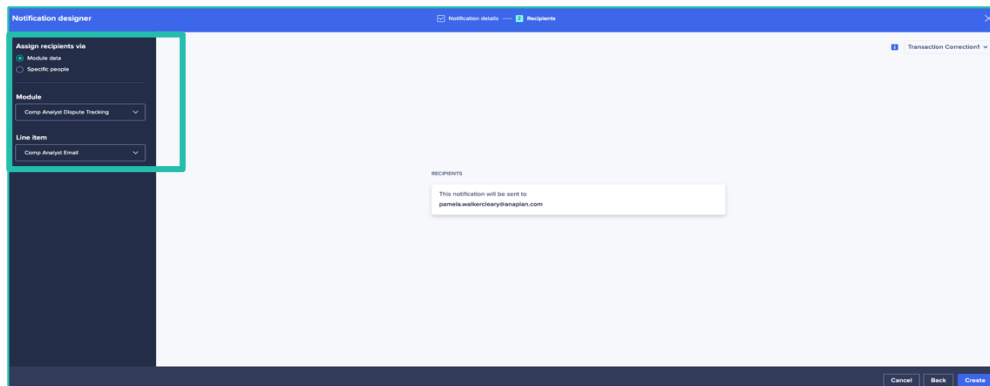
6.2 Comp Analyst Dispute Workspace SPM - Incentive Compensation Management v3

Notify Analyst of Dispute

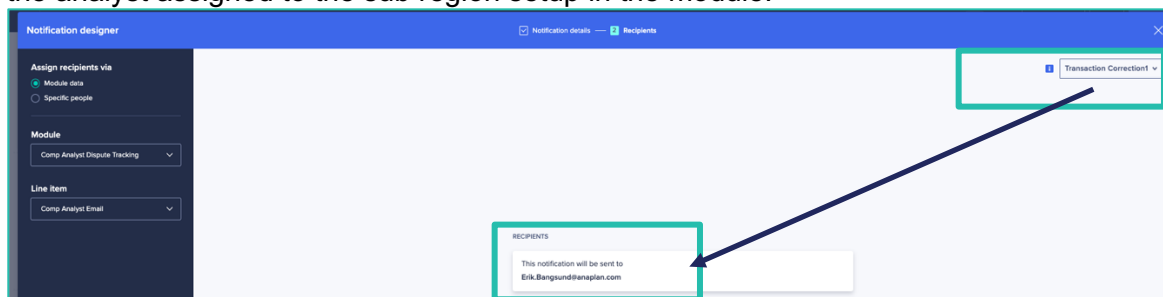
A new dispute has been created and assigned to you. Click the page link to review the dispute.\$\$\$\$

Cancel Next

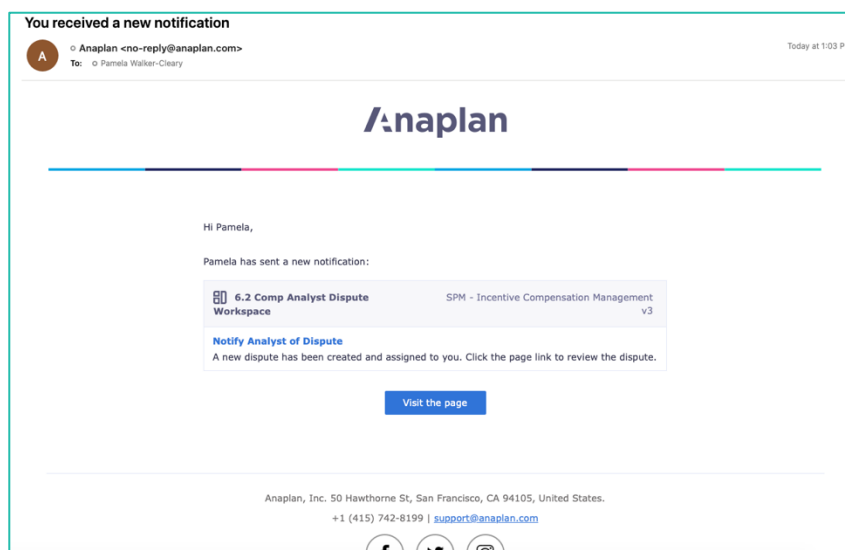
After the notification is configured, click Next. From the upper left page drop-down, choose the module to use to dynamically assign the analyst notification.



Test the email receiver (module email line item is automatically selected), based on current page's context. In this case when a dispute is selected on the page, the notification is sent to the analyst assigned to the sub region setup in the module.



Email notification is sent to the analyst assigned to the sub region based on the rep's sub region and content and page link configured in the notification action.



Automatic Payment Approvals

Automate processes whenever possible. Many organizations do not require an extensive payment approval review and approval process.

In this example, automatic approvals are based on payment boundaries for each role.

		Lower Bound	Upper Bound	Payee Count	Payee %	Payroll
Strategic AE	Auto Approve Tier	-	\$ 25,000	7	70.0%	\$ 14,120
	Tier 2 Group Approve	\$ 25,000	\$ 60,000	3	30.0%	\$ 106,466
	Must Review Individual	\$ 60,000	-	-	-	-
	All Approval Levels	-	-	10	100.0%	\$ 120,585
Enterprise AE	Auto Approve Tier	-	\$ 18,000	16	94.1%	\$ 30,673
	Tier 2 Group Approve	\$ 18,000	\$ 50,000	1	5.9%	\$ 47,956
	Must Review Individual	\$ 50,000	-	-	-	-
	All Approval Levels	-	-	17	100.0%	\$ 78,629
Mid-Market AE	Auto Approve Tier	-	\$ 10,000	6	33.3%	\$ 18,532
	Tier 2 Group Approve	\$ 10,000	\$ 38,000	8	44.4%	\$ 173,937
	Must Review Individual	\$ 38,000	-	4	22.2%	\$ 355,703
	All Approval Levels	-	-	18	100.0%	\$ 548,173
General Overlay	Auto Approve Tier	-	\$ 12,500	14	100.0%	\$ 16,000
	Tier 2 Group Approve	\$ 12,500	\$ 25,000	-	-	-
	Must Review Individual	\$ 25,000	-	-	-	-
	All Approval Levels	-	-	14	100.0%	\$ 16,000
Storage Specialist	Auto Approve Tier	-	\$ 14,000	5	83.3%	\$ 14,287
	Tier 2 Group Approve	\$ 14,000	\$ 35,000	1	16.7%	\$ 19,941
	Must Review Individual	\$ 35,000	-	-	-	-
	All Approval Levels	-	-	6	100.0%	\$ 34,228
Network Specialist	Auto Approve Tier	-	\$ 15,000	5	83.3%	\$ 4,135
	Tier 2 Group Approve	\$ 15,000	\$ 37,500	1	16.7%	\$ 16,835
	Must Review Individual	\$ 37,500	-	-	-	-
	All Approval Levels	-	-	6	100.0%	\$ 20,969
Cloud Specialist	Auto Approve Tier	-	\$ 15,000	5	100.0%	\$ 23,840
	Tier 2 Group Approve	\$ 15,000	\$ 42,500	-	-	-
	Must Review Individual	\$ 42,500	-	-	-	-
	All Approval Levels	-	-	5	100.0%	\$ 23,840
Server Specialist	Auto Approve Tier	-	\$ 10,000	4	80.0%	\$ 8,066
	Tier 2 Group Approve	\$ 10,000	\$ 50,000	1	20.0%	\$ 13,936
	Must Review Individual	\$ 50,000	-	-	-	-
	All Approval Levels	-	-	-	-	-

There are three tiers of approvals to which formula are applied:

- Automatic Approval
- Tier 2 Approvals
- Must Review

Line Item Formula		Format	Formula	Summary	Applies To	Time Scale	Time Range	Versions	Style	Cell Count
Monthly Payroll Thresholds										
Lower Bound	Number		None	-	Role, Payroll Thresholds	Month	Model Calendar All			864
Upper Bound	Number		None	-		Month	Model Calendar All			864
Payee Count	Number		Monthly Payout Setup.Count(SUM: Monthly Payout Setup.rang final, SUM: Month Sum, Time: Closing Balance)	-		Month	Model Calendar All			1,248
Payee %	Number		Payee Count / Payee Count(SELECT: Payroll Thresholds All Approval Levels)	-		Month	Model Calendar All			1,768
Payroll	Number		Monthly Payout Setup.USD Pay(SUM: Monthly Payout Setup.rang final, SUM: MoSum)	-		Month	Model Calendar All			1,768

Monthly Payroll Thresholds module

Each tier is mapped to the payee's payout and approval flags are checked automatically if the payee's payment does not exceed the lower boundary.

SPM - Incentive Compensation Management v3

Line Item Formula

Monthly Pay Summary Final ApprovalMonthly Payroll ThresholdsMonthly Payout Setup

ViewEditFormatData

Payroll ThresholdIF Local Pay >= Monthly Payroll Thresholds.Lower Bound(LOOKUP: Role) THEN ITEM(Payroll Thresholds) ELSE BLANK

Monthly Payout SetupActualJun 21

	S4 Payee	Payee ID	Currency	Role	Plan	Target Incentive	YTD USD Pay	USD Pay	Local Pay	Target Incentive %	Hold	Must Review Individual Approval	Payroll Approved?	Approval Comments	Payroll Threshold	rang final	Approved Amount	Held?	cf Must Review Individual	Final?
Frazier, Tom	Frazier, Tom	00100001	USD	Strategic AE	Strategic Plan	\$ 120,000	\$ 144,605	\$ 27,319	27,319	121%					Tier 2 Group Ap	Tier 2 Group Ap	\$ 27,319	0	1	1
Johnson, Ron	Johnson, Ron	00100002	CAD	Strategic AE	Strategic Plan	\$ 120,000	\$ 190,373	\$ 43,180	52,777	159%					Tier 2 Group Ap	Tier 2 Group Ap	\$ 43,180	0	1	1
Brooks, Reagan	Brooks, Reagan	001008	USD	Mid-Market AE	Mid Market Plan	\$ 120,000	\$ 64,318	\$ 17,822	17,822	54%					Tier 2 Group Ap	Tier 2 Group Ap	\$ 17,822	0	1	1
Thomas, Tripp	Thomas, Tripp	001009	AUD	Mid-Market AE	Mid Market Plan	\$ 120,000	\$ 120,816	\$ 16,874	22,074	101%					Tier 2 Group Ap	Tier 2 Group Ap	\$ 16,874	0	1	1
Waterbury, Reggie	Waterbury, Reg	001002	USD	Enterprise AE	Enterprise Plan	\$ 140,000	-	-	-	0%					Auto Approve Ti	Auto Approve Ti	-	0	1	1
Bosco, Gabby	Bosco, Gabby	5000249	USD	General Overlay	General Overlay	-	\$ 6,000	\$ 6,000	6,000	0%					Auto Approve Ti	Auto Approve Ti	\$ 6,000	0	1	1
King, Joshua	King, Joshua	5000250	CAD	General Overlay	General Overlay	-	\$ 10,000	\$ 4,000	4,888	0%					Auto Approve Ti	Auto Approve Ti	\$ 4,000	0	1	1
Zalack, Janie	Zalack, Janie	500001	USD	General Overlay	General Overlay	-	-	-	-	0%					Auto Approve Ti	Auto Approve Ti	-	0	1	1
Gazer, Les	Gazer, Les	500003	USD	Service Special	Services Special	-	\$ 52,340	\$ 37,240	37,240	0%					Tier 2 Group Ap	Tier 2 Group Ap	\$ 37,240	0	1	1
Schere, Kaighley	Schere, Kaighley	500004	USD	Storage Special	Hardware Special	-	\$ 5,337	\$ 713	713	0%					Auto Approve Ti	Auto Approve Ti	\$ 713	0	1	1
Monroe, Major	Monroe, Major	500005	USD	Network Special	Hardware Special	-	\$ 5,377	\$ 713	713	0%					Auto Approve Ti	Auto Approve Ti	\$ 713	0	1	1
Thompson, Will	Thompson, Will	001003	USD	Enterprise AE	Enterprise Plan	\$ 140,000	\$ 25,456	\$ 1,000	1,000	16%					Auto Approve Ti	Auto Approve Ti	\$ 1,000	0	1	1
Berry, Carolyn	Berry, Carolyn	003722	USD	Mid-Market AE	Mid Market Plan	\$ 120,000	\$ 177,413	\$ 19,921	19,921	148%					Tier 2 Group Ap	Tier 2 Group Ap	\$ 19,921	0	1	1
Howard, Mel	Howard, Mel	003805	USD	Mid-Market AE	Mid Market Plan	\$ 120,000	\$ 26,560	\$ 8,104	8,104	22%					Auto Approve Ti	Auto Approve Ti	\$ 8,104	0	1	1
Powers, Connie	Powers, Connie	003884	USD	Mid-Market AE	Mid Market Plan	\$ 120,000	\$ 148,583	\$ 32,386	32,386	124%					Tier 2 Group Ap	Tier 2 Group Ap	\$ 32,386	0	1	1
Riddle, Jessie	Riddle, Jessie	003895	USD	Mid-Market AE	Mid Market Plan	\$ 120,000	\$ 194,278	\$ 45,237	45,237	162%					Must Review Ini	Must Review Ini	\$ 45,237	0	1	1
Prust, Colin	Prust, Colin	004219	USD	Enterprise AE	Enterprise Plan	\$ 140,000	\$ 9,397	\$ 3,758	3,758	7%					Auto Approve Ti	Auto Approve Ti	\$ 3,758	0	1	1
Silva, Cristina	Silva, Cristina	003921	USD	Enterprise AE	Enterprise Plan	\$ 140,000	\$ 2,269	\$ 99	99	2%					Auto Approve Ti	Auto Approve Ti	\$ 99	0	1	1
Gregory, Tim	Gregory, Tim	004220	USD	Enterprise AE	Enterprise Plan	\$ 140,000	-	-	-	0%					Auto Approve Ti	Auto Approve Ti	-	0	1	1
Maveitz, Jon	Maveitz, Jon	5001	USD	Sales Manager	Sales Manager	-	\$ 50,000	\$ 25,000	25,000	0%					Auto Approve Ti	Auto Approve Ti	\$ 25,000	0	1	1
Dean, Darcy	Dean, Darcy	5002	USD	Overlay Manager	Sales Manager	-	\$ 10,000	\$ 10,000	10,000	0%					Auto Approve Ti	Auto Approve Ti	\$ 10,000	0	1	1
Simonson, Ali	Simonson, Ali	501 - TBH - KE	Strategic AE	Strategic Plan		\$ 120,000	\$ 46,646	\$ 6,391	-	39%					Auto Approve Ti	Auto Approve Ti	\$ 6,391	0	1	1
Northeast						\$ 1,780,000	\$ 1,289,768	\$ 305,756	315,051	955%					Must Review Ini		\$ 305,756	0	22	22
Rowley, Jodi	Rowley, Jodi	500002	USD	General Overlay	General Overlay	-	-	-	-	0%					Auto Approve Ti	Auto Approve Ti	-	0	1	1
Wesinger, Elisabeth	Wesinger, Elisabeth	50000271	USD	Cloud Specialist	Cloud Specialist	-	\$ 50,437	\$ 7,849	7,849	0%					Auto Approve Ti	Auto Approve Ti	\$ 7,849	0	1	1

Monthly Payout Setup module

The Payment Approval Dashboard includes an approval flag for those payments falling within the 2nd tier. And the final “Must Review” payments must be reviewed prior to approval.

Payment Snapshots

Once payments (calculated earnings) are sent to payroll or to accounts payable those calculated results **must not** change. Compensation specialists must have the ability to trace actual payments back to these results if being audited and for regulatory compliance and governance reasons.

To preserve these results, consider creating snapshots of this data for the payment interval(s). Due to the large amount of data normally needed in a commission model, you'll likely only snapshot the calculated results module(s) for the payment interval although you might consider snapshotting credit results.

Track the date earning results are sent to the payment system and the system they are sent to. Some customers require that the check/electronic payment number and payment dates are imported back into the commission application and tagged onto the payment results as well. There's a short video on Anaplan Community that discusses [snapshots](#) in more detail. You will need to make a copy of earning results for each snapshot to re-calculate results for adjustments that come into the application after payments are sent out. See the "Prior Period Adjustments" section for an example. When using the snapshot approach use a Custom Versions List method. You can snapshot versions only for relevant modules rather than the entire model when using the custom versions list method. It's easier to scale to many versions or payment results. You'll need to create an Admin page with the ability to access these modules when needed if taking this approach.

Consider using **Dynamic Cell Access** (DCA) to control any potential updates. DCA boolean logic applied to earning results can be used to lock down the data when it's approved and sent to payment systems. Even if creating a copy of the earnings for snapshot it's recommended that you lock down any potential result changes using DCA. There is a [Dynamic Cell Access learning app](#) on the App Hub that is very helpful and easy to follow. Also, a [video](#) demoing the learning app on community. A general guideline for DCA is to use dedicated modules to store your access logic. DCA can also be used to control periods that are closed vs open (current and future) periods. DCA is used to lock down compensation plan components and rates when approval status is set to approved in the demo model.

Another suggested best practice is to export crediting, calculation, and payment results into a separate **Reporting Model** along with any other relevant data needed for reporting and potential audits. Splitting models won't solve for the retro-calculation (clawback) requirements many customers have. It will solve for most potential concurrency issues. The majority of reporting end users are sales reps and sales leaders. Reporting data does not need to be calculated. Although you should consider adding in an estimator/what-if commission calculator for sales inspiration.

Candidates for snapshots

- Payments (calculated commission and bonuses sent to Payroll/Accounts Payable)
- Credits (credits related to exported payments)
- Transactions (possibly transactions if used to compare to adjusting transactions)
- Position assignments (to track assignment changes after payments are exported for the period)
- Role assignment changes (if not using position and if using roles to assign salespeople to compensation plans)

It's no longer necessary to have the entirety of functionality in one model with the new ability to create **user interface applications** that can combine data from separate models.

Additionally, thinking ahead to the enhanced calculation engine in 2021, this may also help to facilitate better performance, as sparse reporting models could be set up in ECE and heavier calculation models can leverage classic calc engine for better performance.

Model Download Link

The Anaplan Model used as the basis for the Sales Crediting Model can be downloaded from the Anaplan Master Demo workspace.

[SPM – Incentive Compensation Management](#)

App: Reach out to your assigned SC Support User to complete “Duplicate App” process for corresponding UX App.

A new “walk-through” demo recording can be found on Hi Spot.

Collateral for demo, including reset instructions can be found on Hi Spot.

Incentive Compensation Sale Crediting and Comp Plan solution guides can be downloaded from Anaplan Community:

<https://community.anaplan.com/t5/Sales-Knowledge-Base/Anaplan-for-Sales-Solution-Guides/ta-p/112145>