



INCENTIVATE

INCENTIVE AUTOMATION FRAMEWORK

A systematic approach to guide you in your incentives automation journey

1 Data Management

Start by laying a solid foundation with robust data management practices. Identify, ingest, organize, and validate data from various sources to ensure accuracy and integrity.

2

Sales Alignment & Crediting

Achieve fairness and transparency by aligning transactions with payees, defining clear product groupings, and establishing rules for credit splits and overrides.

3

Incentive Calculations

Drive desired behaviors with precise incentive calculations. Define performance measures, calculation periods, and qualification criteria while incorporating HR exception rules for fairness.

4

Reporting & Transparency

Enable informed decision-making with comprehensive reporting and transparency. Provide detailed performance insights, forecasting tools, and actionable insights to empower your teams.

5

Engagement & Insights:

Foster collaboration and performance with engaging tools and insights. Visualize potential earnings, leverage cohort analysis for customer-centric strategies, and deliver real-time insights through multiple channels.

Our program governance framework covers every step (changes, approvals, overrides, exceptions, queries, etc.) to ensure audit and compliance-friendly automation.



This framework is a guide for automating sales incentives. Evaluate your automation progress: starting, partial implementation, or process alignment. Reflecting on these aspects helps measure your proximity to full automation:



Data Readiness:

Do you have a comprehensive understanding of your data sources and their quality? Are you able to efficiently organize and validate this data?



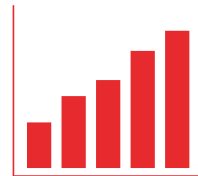
Alignment & Fairness:

How effectively are you aligning sales transactions with payees and ensuring fairness across the board?



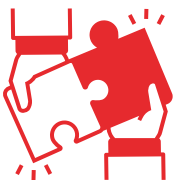
Calculation Precision:

Are your incentive calculations accurate and transparent? Do you have mechanisms in place to handle exceptions and ensure fairness?



Reporting & Insights:

Are you providing your teams with the right tools and insights to make informed decisions and drive performance?



Engagement & Collaboration

How well are you leveraging automation to engage your sales teams and provide personalized actionable insights?