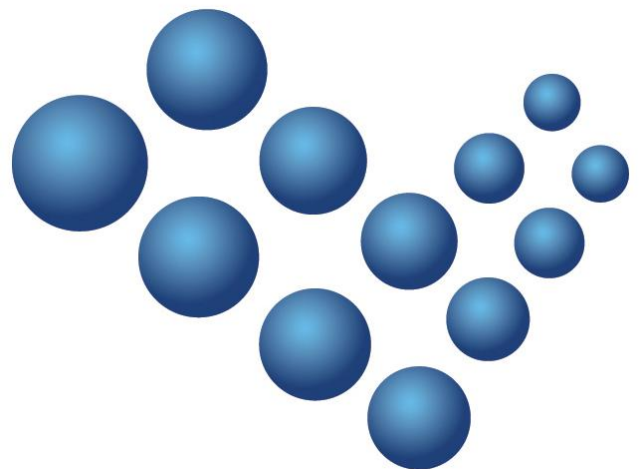


Varicent Educational Services

Sales Performance Management

Sales Analytics Fundamentals (2-Days)

Level I



Varient Sales Performance Management

Sales Analytics Fundamentals Level I

Training Product Sheet

Course Name: SPM Sales Analytics Fundamentals Level I (2-Days)

Course Code: SPM-SA-I-100

Course Duration: 2 Days

Description:

The SPM Sales Analytics Fundamentals course is designed to provide in-depth, hands-on training that focuses on the SPM Sales Analytics reporting capabilities; specifically, the Presenter module. This training offering is part of the Varient learning path recommended to all customers, partners, and employees.

Training Audience:

The SPM Sales Analytics Fundamentals course is a required training course offering in the Varient learning path towards Varient Certification. This training course is recommended to all customers, partners, and employees who will be responsible for designing and creating highly formatted compensation statements, summary statements with drill-through to detailed reports, sales representative forecasting and modeling reports, and other analytical or operational reports.

Pre-Requisites:

- Efficient in Windows XP
- Experienced using Internet Explorer
- Knowledge of Database Design and Relational Databases
- Proficient in Microsoft Excel and Microsoft Word
- Successfully completed the SPM Essentials and the SPM Incentive Compensation Management (ICM) Fundamentals course. SPM ICM Case Study is recommended.

Training Environment:

All training participants are required to bring a laptop or desktop computer to the training session with VMPlayer already installed prior to the training date.

All Varient Instructor-Led Training is delivered using a virtual machine/environment using VMWare. To learn more about VMWare and to install the VMPlayer, visit www.vmware.com. On the first day of your training, the instructor will provide you with the appropriate files that contain the Varient training environment. These files will be distributed on a DVD or USB Drive. Participant laptops or desktops are required to have a DVD Player and a USB Enabled Port.

You will simply copy these files to your laptop or desktop. To install the VMPlayer, you will need to have Administrative rights and may need to contact your IT Group directly for assistance.

Training Price:

The standard price for this training is US\$800/Day for each participant.

Delivery Methodology:

- Lecture and Slide Presentations
- Software Demonstrations
- Class Discussions
- Hands-on Lab Exercises
- Virtual Training Environment (VM Image)

Student Guide

- All presentation slides and student notes
- Students are encouraged to take notes

Labs Exercises

- Hands-on lab exercises and solutions

Resources

- Varient Support Center

Course Objectives:

After completing this course, you will be able to:
<ul style="list-style-type: none"> • Describe the various reporting options available in the Varient Sales Performance Management (SPM) solution including standard reports, tailored reports, dashboard reports, payee ledger reports, and presenter reports
<ul style="list-style-type: none"> • Navigate the presenter module within the Varient Administrative client
<ul style="list-style-type: none"> • Explain the various data components and presentation components and the relationships of how these components work together within the Presenter module
<ul style="list-style-type: none"> • Design and create a presenter report layout using layout tables
<ul style="list-style-type: none"> • Create reusable presenter report templates
<ul style="list-style-type: none"> • Describe each of the data components in-depth including calculations, parameters (date, text, numeric), scalars (table, computed, constants), and sources
<ul style="list-style-type: none"> • Describe each of the presentation components in-depth including images, text scalars, fixed grids, data grids, single-series charts, multi-series charts, maps text controls, pick list controls, and submit buttons
<ul style="list-style-type: none"> • Set the various display properties and options available for each of the presentation options (i.e. fonts, conditional formatting, links, alignment, etc.)
<ul style="list-style-type: none"> • Create a highly formatted compensation statement with summary level information; including drill-through (link) to a highly formatted compensation statement with detailed level information (Account Executives Summary Report and Accounts Executives Detailed report)
<ul style="list-style-type: none"> • Complete a variety of other types of presenter reports such as sales representatives forecasting and modeling report (self-calculator), and other analytical or operational reports.

Training Agenda:

The SPM Sales Analytics Fundamentals (2-Days) training course will be delivered beginning at 9:00 a.m. on the first day. The trainer will schedule a morning break at 10:30 a.m., lunch at 12:00 p.m. (noon), and an afternoon break at 2:30 p.m. The training will be finish at 5:00 p.m.

All participants are expected to attend the full training days as the training modules build upon one another. Any participants that do not attend parts of the training are expected to complete the exercises that they have missed on their own and should not impact the training schedule.

The trainer will coordinate and adjust the training agenda based on trainers/participants flight departure times on the final day of training.

Day 1

Start Time	End Time	Module #	Module Title
9:00 a.m.	9:30 a.m.	i	Course Introduction
			Learning Objectives <ul style="list-style-type: none"> • Identify other participants in the course and their expectations • Explain the intended course learning objectives • Describe the course agenda including duration and breaks • Review the course logistics
9:30 a.m.	10:00 a.m.	1	SPM Sales Analytics Overview
			Learning Objectives <ul style="list-style-type: none"> • Describe the various reporting options available in Varicent including standard, dashboard, payee ledger, tailored, presenter and performance analytics reports • Learn how to navigate the Presenter module toolbar icons within the Varicent Administrative client
10:00 a.m.	10:30 a.m.	2	The SoftCo Case Study
			Learning Objectives <ul style="list-style-type: none"> • Review the Business Requirements for the SoftCo Case Study • Review the ERD Diagram and Data Model for the SoftCo Case Study • Discuss the SoftCo model and seed data (Payees, Customers, Data, Accounts, Products, etc.) already populated in the training environment • Review the Account Executives and Inside Sales Representatives compensation plan business requirements • Understand the existing tables within the SoftCo model • Understand the existing calculations within the SoftCo model • Explain the existing Compensation Plans
Morning Break			

10:45 a.m.	11:00 a.m.	3	SPM Sales Analytics Basic Navigation Learning Objectives <ul style="list-style-type: none"> • Learn how to access the Presenter module and create a new report or open an existing report • Learn how to navigate the Presenter module including the toolbar icons, the data components pane, the presentation components pane, the layout screen and the preview screen • Explain the importance of naming conventions when creating data and presentation components • Create a Report Builder role and assign the new role to a new Varicent Report Builder Administrator • Recognize the importance of investing time in report design and planning and review some key presenter report considerations • Review joining multiple calculations into one Source
11:00 a.m.	12:00 p.m.	4	SPM Sales Analytics Creating a Template Learning Objectives <ul style="list-style-type: none"> • Understand the importance of the Save icon • Add Layout tables to a report • Add and Image to a report • Create a link from an Image • Add Text to a report • Format Text in a report • Edit padding of cells • Edit alignment of cells
Lunch Break			
1:00 p.m.	2:30 p.m.	5	SPM Sales Analytics Creating the AE Summary Report Learning Objectives <ul style="list-style-type: none"> • Identify the intended audience and use of the report • Explain the use of Parameters in a report • Explain the difference between Pick List Controls and Text Controls • Create a Pick List calculation for a Pick List Control • Create a Pick List Source for a Pick List Control • Create Parameters • Add Parameters to a Pick List Control • Explain the use of Scalers in a report • Identify the Report Components Scalers can be used in • Create Scalers • Add Scalers to a Fixed Grid • Enable a report for Web viewing
Afternoon Break			

2:45 p.m.	4:30 p.m.	5 (con't)	SPM Sales Analytics Creating the AE Summary Report Learning Objectives <ul style="list-style-type: none"> • Explain how to leverage existing calculations from the composer module in the presenter module that will be stored and displayed in presentation components • Create a Source using existing calculations and parameters • Create a Data Grid using a Source • Format a Data Grid • Add a Single Series Chart to a report • Edit padding and alignment
4:30 p.m.	5:00 p.m.		SPM Sales Analytics Q&A Learning Objectives <ul style="list-style-type: none"> • Participant driven

Day 2

Start Time	End Time	Module #	Module Title
9:00 a.m.	9:30 a.m.		SPM Sales Analytics Review of Day 1 Learning Objectives <ul style="list-style-type: none"> • Explain concepts learned in Day 1
9:30 a.m.	10:30 a.m.	6	SPM Sales Analytics Account Executives Detailed Report Learning Objectives <ul style="list-style-type: none"> • Reinforce Day 1 concepts through hands-on activity • Create a Numeric Scaler • Create a Computed Column in a Source • Add a Multi-Series Chart to a report • Link one presenter report to another
Morning Break			

10:45 a.m.	12:00 p.m.	7	SPM Sales Analytics Other Reporting Capabilities
			Learning Objectives <ul style="list-style-type: none"> • Transpose a Source • Add transposed Source to a Data Grid • Aggregate a Source • Add aggregated Source to a Data Grid • View mapping capabilities • Create cascading Pick List Controls
Lunch Break			
1:00 p.m.	2:30 p.m.	8	SPM Sales Analytics Case Study
			Learning Objectives <ul style="list-style-type: none"> • Apply knowledge learned to the Case Study
Afternoon Break			
2:45 p.m.	4:30 p.m.	8 (con't)	SPM Sales Analytics Case Study
			Learning Objectives <ul style="list-style-type: none"> • Apply knowledge learned to the Case Study
4:30 p.m.	5:00 p.m.		SPM Sales Analytics Q&A
			Learning Objectives <ul style="list-style-type: none"> • Participant driven

Contact Varient Educational Services

If you have any questions or would like to register for a Varient Training course, please contact Educational Services at **416-642-9665** or **training@varicent.com**.