

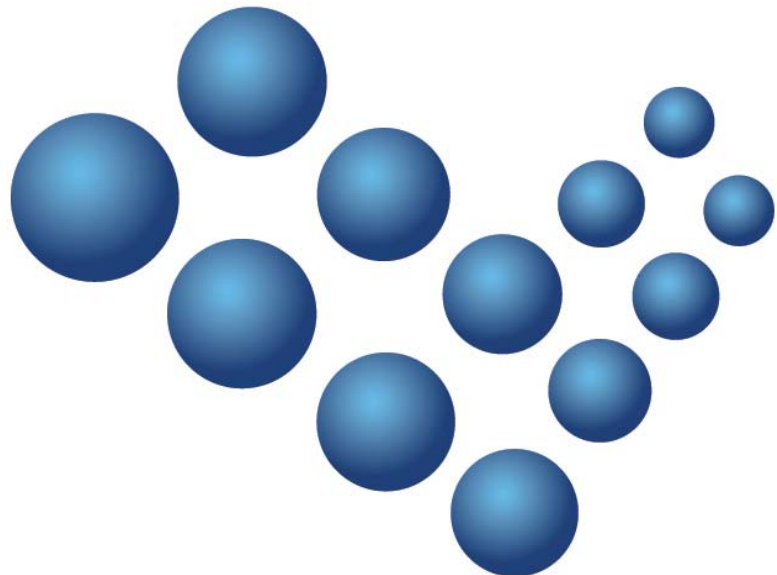
Varient Sales Performance Management Incentive Compensation Management I Training Product Sheet



Course Name: SPM Incentive Compensation Management I (3-Days)

Course Code: SPM-ICM-I-100

Course Duration: 3 Days



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Description:

Varient Incentive Compensation Management is an end-to-end solution that manages and automates incentive compensation calculations and processes. Organizations that are employing pay-for-performance or variable pay programs are able to implement plans quickly, issue commissions payouts accurately, and streamline administration and communications across the enterprise. With built-in data import and export features, Varient ICM easily integrates rapidly with all upstream and downstream systems such as sales order tracking and payroll applications. The user interface is designed specifically for business users so compensation analysts or sales managers can administer and manage plans and processes without requiring IT assistance. Full auditing capabilities are also provided in order to ensure compliance as well as traceability of tasks and communications.

In this training course, you will learn how to navigate the Varient Administrative client and the Varient Web client. You will also be introduced to all modules included in the Varient Administrative client including the Home Page, Configure, Plan Manager, Composer, Calculate, Workflow, Scheduler, Task Manager, Audit Log, Web Forms, Standard Reports, Dashboarding, and Presenter.

Training Audience:

The SPM Incentive Compensation Management I course is a required training course offering in the Varient learning path and is a pre-requisite to the SPM Incentive Compensation Management I Case Study, and the SPM Sales Analytics I training course offerings. All customers, partners, and employees are required to successfully complete this training offering.

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 training offering

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: |
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| <ul style="list-style-type: none"> ◆ Demonstrate how to navigate the Varient Administrative Client user interface including the module bar, menu system, and various toolbar icons |
| <ul style="list-style-type: none"> ◆ Learn how to use each of the modules including the Home Page, Configure, Plan Manager, Composer, Calculate, Workflow, Scheduler, Task Manager, Audit Log, Payee Ledger, Web Forms, Standard Reports, Dashboarding, and Presenter. |
| <ul style="list-style-type: none"> ◆ Create a data model using extended tables including hierarchical, structural, data, custom, and views type tables |
| <ul style="list-style-type: none"> ◆ Create a payee group and add payee members to belong to a compensation plan |
| <ul style="list-style-type: none"> ◆ Create numerous calculations and calculation trees/streams to determine the final payout to payees on a compensation plan |
| <ul style="list-style-type: none"> ◆ Create a compensation plan and payee ledger report for a group of payees |
| <ul style="list-style-type: none"> ◆ Generate and view a compensation plan and payee ledger report for a group of payees |
| <ul style="list-style-type: none"> ◆ Create ad hoc tailored reports that query the Varient model |
| <ul style="list-style-type: none"> ◆ Generate and view a tailored report |
| <ul style="list-style-type: none"> ◆ Calculate the Varient model using various calculation options |
| <ul style="list-style-type: none"> ◆ Grant access to the Varient Web Client and various components using Workflow Groups, Trees, and Assignment |
| <ul style="list-style-type: none"> ◆ Create and schedule processes and events to automate common administrative events |
| <ul style="list-style-type: none"> ◆ Create workflow/task manager groups, rules and generate tasks to automate common administrative tasks |
| <ul style="list-style-type: none"> ◆ Review the audit log and archive audit log entries |
| <ul style="list-style-type: none"> ◆ View the payee ledger reports, tailored reports, and adjustments in Payee Ledger |
| <ul style="list-style-type: none"> ◆ Make adjustments and distribute unallocated balances |
| <ul style="list-style-type: none"> ◆ Create a web form to capture data/information into the Varient model |
| <ul style="list-style-type: none"> ◆ Review the standard reports included in the Varient Administrative Client |
| <ul style="list-style-type: none"> ◆ Create dashboard reports that provide a graphical representation of data from the Varient Administrative Client |
| <ul style="list-style-type: none"> ◆ Create customized and branded reports from the presenter module |

Training Agenda:

The SPM Incentive Compensation Management I (3-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 Incentive Compensation Management I - Overview |
| | | | Learning Objectives <ul style="list-style-type: none"> ◆ Describe SPM Incentive Compensation Management |
| 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 |
| Morning Break | | | |
| 10:45 a.m. | 11:30 a.m. | 3 | SPM Incentive Compensation Management I - Data Modeling |
| | | | Learning Objectives <ul style="list-style-type: none"> ◆ Describe a Relational Database ◆ Identify tables, columns and primary keys in a Relational Database ◆ Identify the Varient table and column types ◆ Create a new folder under the Configure Module ◆ Create a new table using Varient table types and column types ◆ Use the import data wizard to populate a table ◆ Apply the view and edit table options ◆ Use the view and edit data options ◆ Use the Data Transformation options ◆ Create an Input Form for a Varient table ◆ Create Validation Rules for Input Forms |
| 11:30 a.m. | 12:00 p.m. | 4 | SPM Incentive Compensation Management I - Working with Hierarchies |
| | | | Learning Objectives |

| | | | |
|------------------------|------------------|----------|--|
| | | | <ul style="list-style-type: none"> ◆ Describe the hierarchical data structures in Varicent ◆ Describe the parent – child relationships of hierarchical data structures ◆ Describe the Account structure in Varicent ◆ Describe the Time structure in Varicent ◆ Describe the process for importing a hierarchical structure ◆ Create a Calendar ◆ Create a Payee Group ◆ Describe the components of a Payee Group ◆ Compose members of a Payee Group |
| Lunch Break | | | |
| 1:00 p.m. | 2:00 p.m. | 5 | SPM Incentive Compensation Management I – Creating Calculations (Account Executives) |
| | | | <p>Learning Objectives</p> <ul style="list-style-type: none"> ◆ Describe a calculation and calculation types ◆ Construct the five steps to creating a calculation ◆ Create calculations for the Accounts Executives Compensation Plan ◆ Apply the copy option for creating calculations ◆ Arranging calculations into folders to better organize calculation trees/streams |
| Afternoon Break | | | |
| 2:15 p.m. | 5:00 p.m. | 6 | SPM Incentive Compensation Management I – Creating Compensation Plans / Payee Ledger Reports (Account Executives) |
| | | | <p>Learning Objectives</p> <ul style="list-style-type: none"> ◆ Describe a Compensation Plan and Payee Ledger Report ◆ Construct a Compensation Plan and Payee Ledger Report ◆ Calculate a Compensation Plan results ◆ View the Payee Ledger Report |

Day 2

| Start Time | End Time | Module # | Module Title |
|----------------------|------------|----------|--|
| 9:00 p.m. | 10:00 p.m. | 7 | SPM Incentive Compensation Management I – Managing Workflow – Groups/Trees/Assignment (Account Executives) |
| | | | Learning Objectives <ul style="list-style-type: none"> ◆ Describe the purpose of Workflow Groups, Trees, Assignment ◆ Create a set of Workflow Groups ◆ Assign Web Access to members of a Workflow Group ◆ Apply the Can Adjust on Web property to the appropriate Workflow Groups ◆ Apply the Sign Off type to the appropriate Workflow Groups ◆ Create an Access, Sign Off, and Inquiry Tree ◆ Assign Access, Sign Off and Inquire Trees to various components in Workflow ◆ Create an Inquiry category ◆ Create a Sign Off process |
| 10:00 p.m. | 10:30 p.m. | 8 | SPM Incentive Compensation Management I – Varient Web Client |
| | | | Learning Objectives <ul style="list-style-type: none"> ◆ Log into Varient Web Client ◆ View the Compensation Plan/Payee Ledger report ◆ Create an Inquiry and walk-through the Inquiry/Dispute process ◆ Approve a Sign Off process |
| Morning Break | | | |
| 10:30 a.m. | 11:15 a.m. | 9 | SPM Incentive Compensation Management I – Task Manager Automation |
| | | | Learning Objectives <ul style="list-style-type: none"> ◆ Describe the purpose of a Task Manager Group ◆ Create a Task Manager Group and Rule ◆ Create a Task Manager Alert ◆ Generate a list of tasks ◆ Apply decisions against the tasks generated by the Task Manager (Dismiss, Defer, and Run) |
| 11:15 a.m. | 12:00 p.m. | 10 | SPM Incentive Compensation Management I – Scheduler Events |
| | | | Learning Objectives <ul style="list-style-type: none"> ◆ Describe the Model Maintenance tasks to be scheduled ◆ Create a list of Model Maintenance tasks ◆ Schedule the Model Maintenance tasks |

| Lunch Break | | | |
|------------------------|------------------|-----------|---|
| 1:00 p.m. | 1:30 p.m. | 11 | SPM Incentive Compensation Management I – Audit Tracking |
| | | | Learning Objectives <ul style="list-style-type: none"> ◆ Describe the purpose of the Audit Log ◆ Apply filters against the Audit Log information ◆ Export the Audit Log contents to MS-Excel ◆ Maintain the Audit Log |
| 1:30 p.m. | 2:30 p.m. | 12 | SPM Incentive Compensation Management I – Web Forms |
| | | | Learning Objectives <ul style="list-style-type: none"> ◆ Create a Simple Filter ◆ Create a Workflow Filter ◆ Create a Web Form ◆ Apply an Add Row Form ◆ Apply a Web Resource to a Web Form ◆ Apply Web Form options ◆ Apply Add Source to a Web Form |
| Afternoon Break | | | |
| 2:45 p.m. | 3:15 p.m. | 13 | SPM Incentive Compensation Management I – Standard, Dashboard, and Tailored Reports |
| | | | Learning Objectives <ul style="list-style-type: none"> ◆ Describe the Standard Reports available in Varient ◆ Run the Standard Reports available within Varient ◆ Export the results of a Standard Report to MS-Excel ◆ Describe the purpose of Tailored Reports ◆ Construct the calculations for a Tailored Report ◆ Create a Tailored Report ◆ View the Tailored Report in the Payee Ledger ◆ Assign access to a Tailored Report in the Varient Web Client ◆ Describe the Dashboard Report including the different types ◆ Construct the calculation for a Dashboard report ◆ Create a Dashboard Report page ◆ Assign access to the Dashboard report in the Varient Web Client |
| 3:15 p.m. | 3:45 p.m. | 14 | SPM Incentive Compensation Management I – Tools and Administration |
| | | | Learning Objectives <ul style="list-style-type: none"> ◆ Create a new Administrator Role ◆ Apply security access to the Administrator Role ◆ Create a new Administrator Account ◆ Create a new message for the Varient Web Client users |

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| | | | <ul style="list-style-type: none">◆ Describe the Migration tool and process◆ Describe the different log files for Varient |
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Day 3

| Start Time | End Time | Module # | Module Title |
|------------|------------|----------|---|
| 9:00 p.m. | 12:00 p.m. | 15 | SPM Incentive Compensation Management I – Creating Calculations (Inside Sales Representatives) |
| | | | Learning Objectives <ul style="list-style-type: none"> ◆ Create the tables in Configure to hold the data for the Inside Sales Representatives Plan ◆ Create the calculations for the Inside Sales Representatives Compensation Plan |
| 1:00 p.m. | 4:30 p.m. | 16 | SPM Incentive Compensation Management I – Creating Compensation Plans / Payee Ledger Reports (Account Executives) |
| | | | Learning Objectives <ul style="list-style-type: none"> ◆ Describe a Compensation Plan and Payee Ledger Report ◆ Construct a Compensation Plan and Payee Ledger Report ◆ Calculate a Compensation Plan results ◆ View the Payee Ledger Report |

Contact Varient Educational Services

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