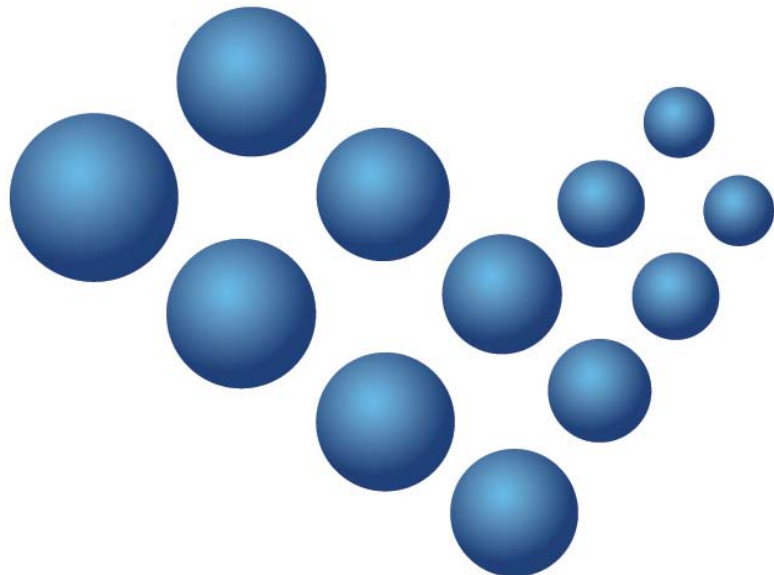


Varient Sales Performance Management Sales Analytics I Training Product Sheet



Course Name: SPM Sales Analytics I (2-Days)
Course Code: SPM-SA-I-100
Course Duration: 2 Days



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Description:

The SPM Sales Analytics I 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 I course is a required training course offering in the Varient learning path. 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 I training offerings

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 Varicent 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 Varicent 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

- ◆ Varicent Support Center

Course Objectives:

After completing this course, you will be able to:	
◆	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
◆	Navigate the presenter module within the Varient Administrative client
◆	Explain the various data components and presentation components and the relationships of how these components work together within the Presenter module
◆	Design and create a presenter report layout using layout tables
◆	Create reusable presenter report templates
◆	Describe each of the data components in-depth including calculations, parameters (date, text, numeric), scalars (table, computed, constants), and sources
◆	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
◆	Set the various display properties and options available for each of the presentation options (i.e. fonts, conditional formatting, links, alignment, etc.)
◆	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)
◆	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 I (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 I - 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
Morning Break			
10:45 a.m.	11:30 a.m.	3	SPM Sales Analytics I - Presentation Architecture – Data Components
			Learning Objectives <ul style="list-style-type: none"> ◆ Describe the various presenter data report components available in the Varicent Administrative client including Calculations (Composer versus Presenter), Parameters (Text, Date, Numeric), Scalars (Table, Computed, Constant), and Sources ◆ Learn how to transform a data source (Aggregate, Transformation, Computed Column, and Transpose) ◆ Review recommended naming conventions to be applied when creating new presenter reports components
11:30 a.m.	12:00 p.m.	4	SPM Sales Analytics I - Presenter Architecture – Presentation Components
			Learning Objectives

			<ul style="list-style-type: none"> ◆ Describe the various presenter presentation report components available in the Varicent Administrative client including Images, Text, Scalars (Text, Date, Numeric), Fixed Grids, Data Grids, Single-Series Charts, Multi-Series Charts, and Maps ◆ Describe how one presenter report can link to another presenter report or URL including how to pass parameters. ◆ Review recommended naming conventions to be applied when creating new presenter report components
Lunch Break			
1:00 p.m.	2:00 p.m.	5	SPM Sales Analytics I - Presenter – Creating a Simple Report
			<p>Learning Objectives</p> <ul style="list-style-type: none"> ◆ Create a simple report to begin learning how the various data and presentation components work together
Afternoon Break			
2:15 p.m.	5:00 p.m.	6	SPM Sales Analytics I - Presenter – Account Executives Summary Report
			<p>Learning Objectives</p> <ul style="list-style-type: none"> ◆ Create the data components (Calculations, Parameters, Scalars, and Sources) for the Account Executives Summary report ◆ Add a series of Layout Tables to define the layout of the Account Executives Summary report ◆ Create the presentation components (Image, Text, Pick List Controls, Submit Button, Fixed Grid, Data Grid, and Single-Series Chart) for the Account Executives report ◆ Save the Account Executives Summary report as the Account Executives Detailed report to leverage existing development efforts
9:00 p.m.	10:00 p.m.	7	SPM Sales Analytics I – Presenter – Account Executives Detailed Report
			<p>Learning Objectives</p> <ul style="list-style-type: none"> ◆ Modify the Accounts Executive Detailed report by deleting data components and presentation components that are not required on the report ◆ Create/Modify the data components for the Account Executive Detailed report ◆ Create/Modify the presentation components for the Account Executive Detailed report ◆ Add links to the Account Executives Summary report and the Account Executives Detailed report ◆ Create Workflow Group, Trees, and Assignment to define access to the Account Executives Summary report and the

			Account Executives Detailed report ◆ View the Account Executive Summary report and Account Executive Detailed reports
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Day 2

Start Time	End Time	Module #	Module Title
9:00 p.m.	10:30 p.m.	8	SPM Sales Analytics I – Presenter – Inside Sales Representatives Summary Report
			<p>Learning Objectives</p> <ul style="list-style-type: none"> ◆ Create the data components (Calculations, Parameters, Scalars, and Sources) for the Inside Sales Summary report ◆ Add a series of Layout Tables to define the layout of the Inside Sales Representative Summary report ◆ Create the presentation components (Image, Text, Pick List Controls, Submit Button, Fixed Grid, Data Grid, and Single-Series Chart) for the Inside Sales Representative Summary report ◆ Save the Inside Sales Representative Summary report as the Account Executives Detailed report to leverage existing development efforts
Morning Break			
10:30 a.m.	11:15 a.m.	9	SPM Sales Analytics I – Inside Sales Representatives Detailed Report
			<p>Learning Objectives</p> <ul style="list-style-type: none"> ◆ Modify the Inside Sales Representative Detailed report by deleting data components and presentation components that are not required on the report ◆ Create/Modify the data components for the Inside Sales Representative Detailed report ◆ Create/Modify the presentation components for the Inside Sales Representative Detailed report ◆ Add links to the Inside Sales Representative Summary report and the Account Executives Detailed report ◆ Create Workflow Group, Trees, and Assignment to define access to the Inside Sales Representative Summary report and the Inside Sales Representative Detailed report ◆ View the Inside Sales Representative Summary report and Inside Sales Representative Detailed reports
11:15 a.m.	12:00 p.m.	10	SPM Sales Analytics I – Presenter – Account Executives Forecast and Modeling Report (Self-Calculator)
			<p>Learning Objectives</p> <ul style="list-style-type: none"> ◆ Create the data components (Calculations, Parameters, Scalars, and Sources) for the Account Executives Forecast and Modeling report (Self-Calculator) ◆ Add a series of Layout Tables to define the layout of the Account Executives Forecast and Modeling report (Self-Calculator) ◆ Create the presentation components (Image, Text, Picklist Controls, Submit Button, Fixed Grid, Data Grid, and Single-Series Chart) for the Account Executives Forecast and Modeling report (Self-Calculator)

Lunch Break			
1:00 p.m.	2:00 p.m.	11	SPM Sales Analytics I – Presenter – Other Reporting Capabilities
			Learning Objectives <ul style="list-style-type: none"> ◆ Learn other reporting capabilities, tips and tricks, and best practices used in creating presenter reports (i.e. Data Transformation, Data Source Transpose, Report, etc.)
2:00 p.m.	3:00 p.m.	12	
			Learning Objectives <ul style="list-style-type: none"> ◆ Complete hands-on exercises to gain additional practice including all learning objects covered in the training
Afternoon Break			
3:15 p.m.	5:05 p.m.	13	
			Learning Objectives <ul style="list-style-type: none"> ◆ Complete hands-on exercises to gain additional practice including all learning objects covered in the training

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**.