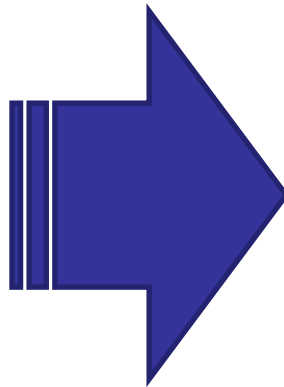


Visual Analytics for Comp Plan Assessment

Donya B. Rose
Managing Principal, The Cygnal Group, Inc.

From data to information

1740.8	0	-244.78	-378.389	0	0	0	0
234921.8	238280.2	200000	283240	5108.99	7853.019	17391.3	26742.602
21112.66	26808.62	30000	38091	382.37	567.2163	2608.7	4011.39799
2248.4	0	0	244.78	378.3892	0	0	0
61307.43	77842.04	250000	317428	0	0	17391.3	26742.602
14280	18109.52	37500	47813.75	84.86	130.649	2608.7	4011.39799
47917.99	60240.96	187500	238098.8	0	0	20000	30754
89360.41	112460.9	250000	317428	4671.14	718.3212	17391.3	26742.602
18920.97	23284.14	37500	47813.75	159.59	239.2394	2608.7	4011.39799
5201.78	6609.07	187500	238098.8	0	0	20000	30754
171568924	171568924	15260700	15260700	3419.23	3419.23	4900	4900
2170626	2170626	2481313	2481313	4462.87	4462.87	11200	11200
12666971	12666971	13824240	13824240	2101.13	2101.13	4900	4900
2476196	2476196	2709000	2709000	4636.77	4636.77	11200	11200
1824843	2249701	1687500	1977568	3212.36	4078.733	10000	12697
7781164	8844337	9619016	12086298	2217.01	2814.938	12600	15871.25
382037.1	448991.5	389378	494389.4	632.36	676.9376	2600	3174.25
374513.3	475519.5	1680000	2130096	0	0	10000	12697
9930866	12609248	10087875	12808676	3003.74	3813.849	12600	15871.25
43209.24	54862.77	420000	539274	0	0	2600	3174.25
414528.1	526326.3	1802600	2288624	0	0	10000	12697
8444874	11992154	11771484	14946253	2080.12	2653.826	12600	15871.25
166661.3	211508.3	480828	674158.6	63.93	81.17192	2600	3174.25
202028.3	266612.8	1980000	2486812	0	0	10000	12697
12799879	16252027	13640376	17319184	2694.32	3420.978	12600	15871.25
34230	43461.83	490000	622153	0	0	2600	3174.25
2023449	2023449	2046000	2046000	52868.35	14423.28	110000	29963



Group sales payments by

- Role category
- Comp plan measure

Use size to show

- % of total dollars by category

You can tell at a glance

- Where your comp dollars are going by role and measure

Percent of Total Dollars Paid by Role and Measure Total Year

	Inside Sales Rep	Direct Sales Rep	System Engineer	Channel Manager	Sales Managers	Sales VPs	Grand Total
Total Bookings	8%	45%	8%	10%	6%	5%	82%
Uplift Product Bookings	1%	9%	1%	0%	1%	2%	14%
QCB		2%	0%		0%		2%
MBO				1%			1%
Grand Total	9%	56%	9%	12%	7%	7%	100%

Group sales payments by

- Geography
- Comp plan measure























Use size to show

- % of total dollars by category

You can tell at a glance

- Where your comp dollars are going by role and geography

Percent of Total Dollars by Geo and Measure

Plan Measure	North America	Europe, MidEast, Africa	Latin America	Asia Pacific	Grand Total
Total Bookings	48% 	19% 	9% 	6% 	81% 
Uplift Product Bookings	8% 	3% 	1% 	2% 	15% 
QCB	1% 	1% 	0% 		2% 
MBO		1% 	1% 		2% 
Grand Total	57% 	23% 	12% 	8% 	100% 

Group sales payments by

- Geography
- Comp plan measure
- Sales role

Use size to show

- % of total dollars by category

Use color to show

- % of dollars in each cell from each geo

You can tell at a glance

- Where your comp dollars are going by role and measure, with a good idea about which geos dominate the spending

Percent of Total Dollars Paid by Role and Measure Total Year



Geography

- North America
- Europe, MidEast, Africa
- Latin America
- Asia Pacific

Group sales payments by

- Comp plan measure
- Sales role
- Quarter
- Person

















Use size to show

- Average payout per person per quarter

You can tell at a glance

- Which sales people are earning the most
- Which components are delivering the most pay by role

Average Dollars Paid per Person per Quarter by Role and Measure Across the Year

	Inside Sales Rep	Direct Sales Rep	System Engineer	Channel Manager	Sales Managers	Sales VPs
Total Bookings	\$5.6K 	\$21.8K 	\$5.1K 	\$8.4K 	\$9.4K 	\$11.7K 
Uplift Product Bookings	\$1.0K 	\$4.7K 	\$0.9K 	\$2.3K 	\$4.6K 	\$6.6K 
QCB		\$1.1K 	\$0.5K 		\$0.6K 	
MBO				\$2.4K 		

All the variations in the prior series can be applied to this one as well (by geo, by role and geo)

Group total payout % target by

- Comp plan measure
- Sales role
- Person

Use size to show

- Average payout across all participants

You can tell at a glance

- Which components are payout over/under target
- Which roles are earning over/under target

Total Year Payout % TIC - by Measure and Role

	Inside Sales Rep	Direct Sales Rep	System Engineer	Channel Manager	Sales Managers	Sales VPs	Grand Total
Total Bookings	101%	121%	105%	107%	96%	91%	111%
Uplift Product Bookings	90%	143%	91%	111%	114%	105%	125%
QCB		39%	43%		25%		39%
MBO				90%			90%
Grand Total	99%	116%	101%	105%	99%	94%	108%

Group actual sales % quota by

- Comp plan measure
- Sales role
- Person
- Geography

Differentiate marks

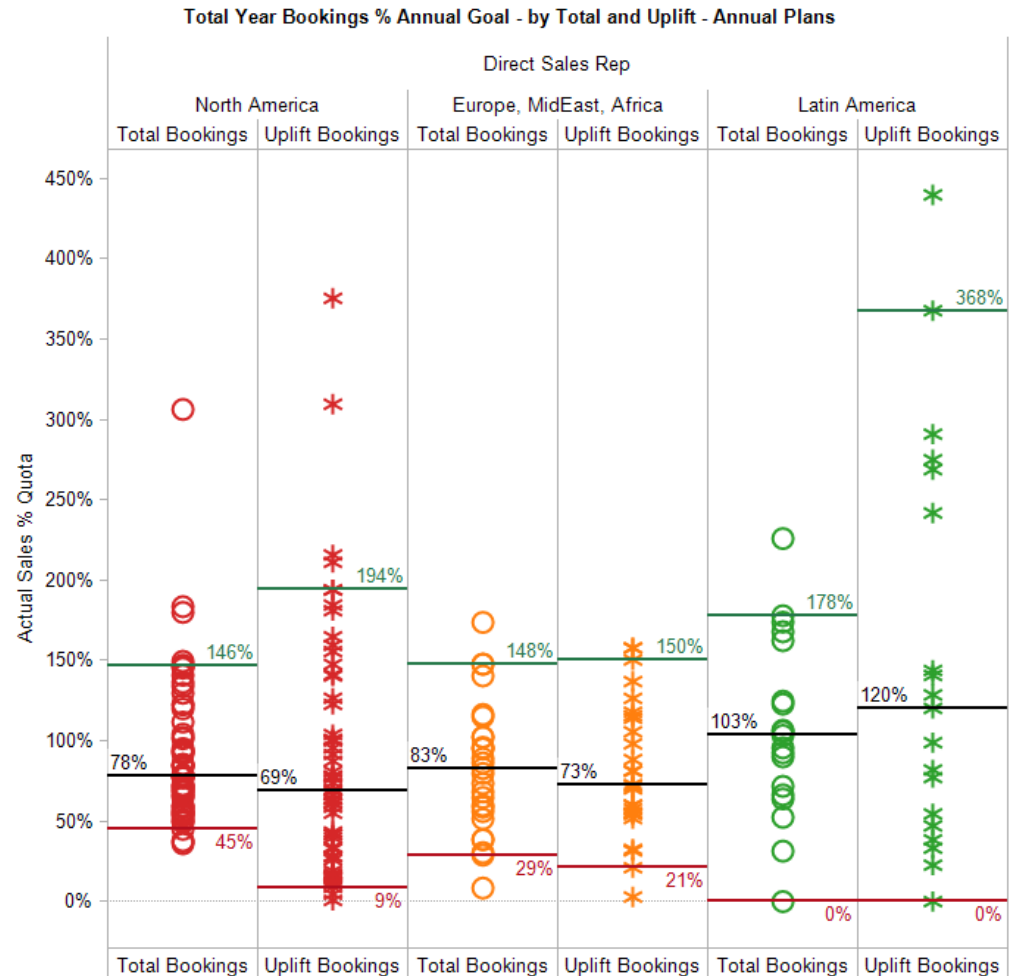
- Color for geography
- Shape for measure

Add reference lines & color code them

- Median
- 90th percentile
- 5th percentile

You can tell at a glance

- What the performance distribution is for each column, and how they compare



Each circle represents one person. The black line is the median value. The green line is the 90th percentile. The red line is the 5th percentile.

Excludes all part-year employees and those who changed roles during the year.

Plan Measure

- Total Bookings
- * Uplift Product Bookings

Geography

- North America
- Europe, MidEast, Africa
- Latin America

Group sales people by

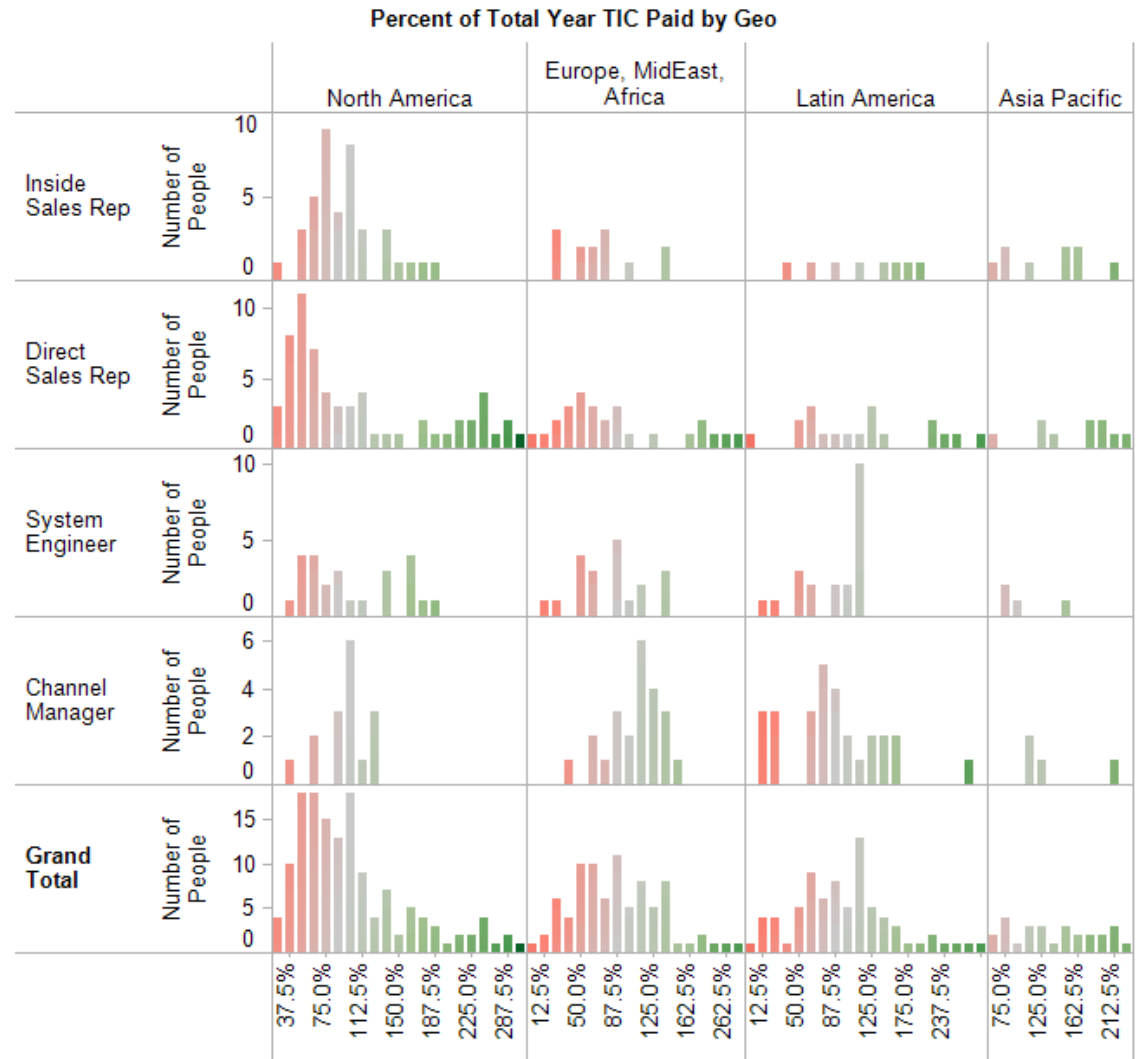
- Role category
- Geography
- Actual comp % target

Use color to show

- <100% red
- Around 100% gray
- >100% green

You can tell at a glance

- Where the people are
- Which regions are paying over/under target
- Which roles are performing over/under target
- Where there are non-normal distributions



Group sales people by

- Role category
- Legacy company
- Actual comp total compensation last year

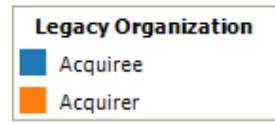
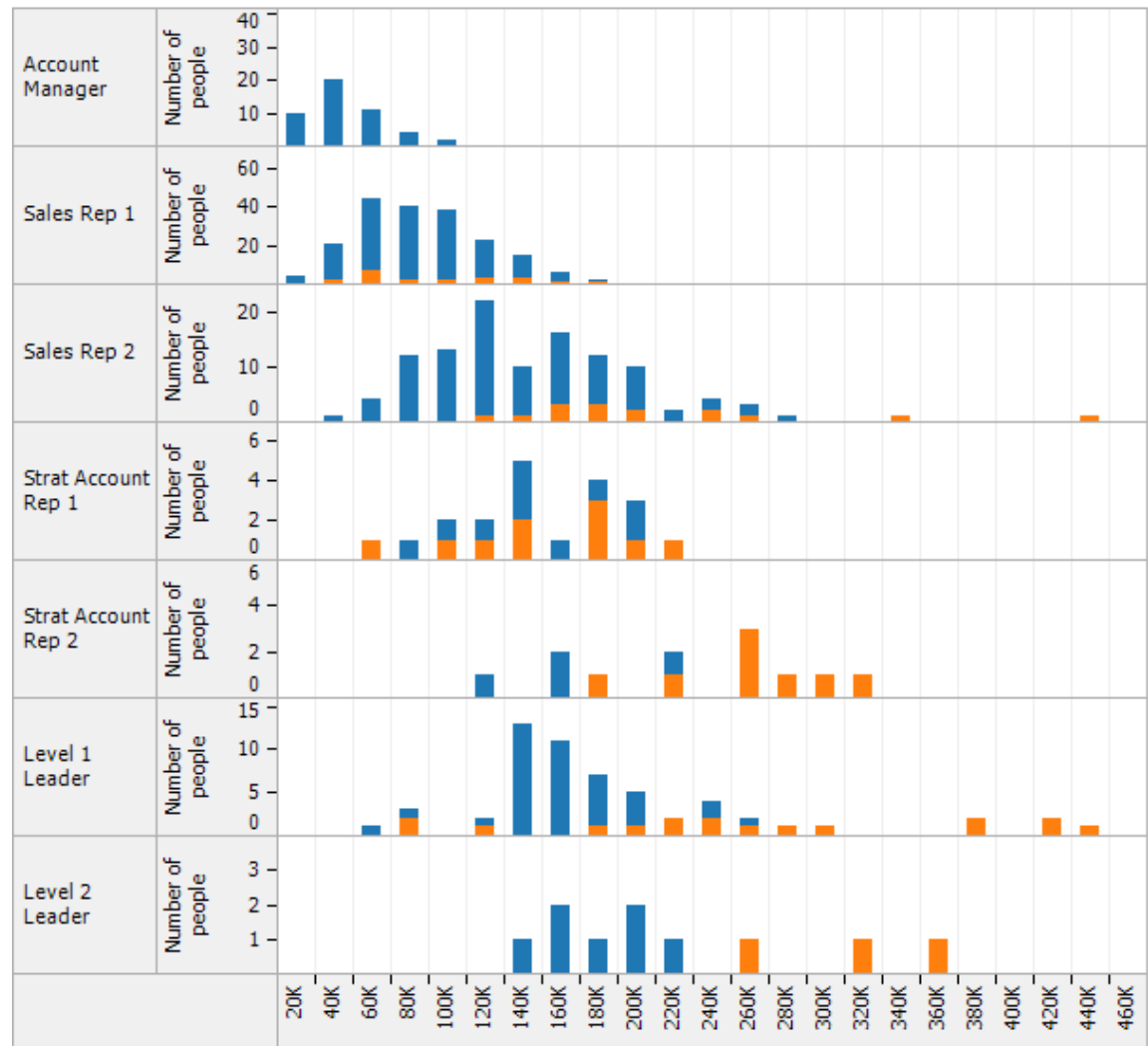
Use color to show

- Legacy company

You can tell at a glance

- The distribution of total compensation by role
- The difference in compensation practices between companies

Total Compensation Distributions



Group sales people by

- Role category
- Legacy company

Use color to show

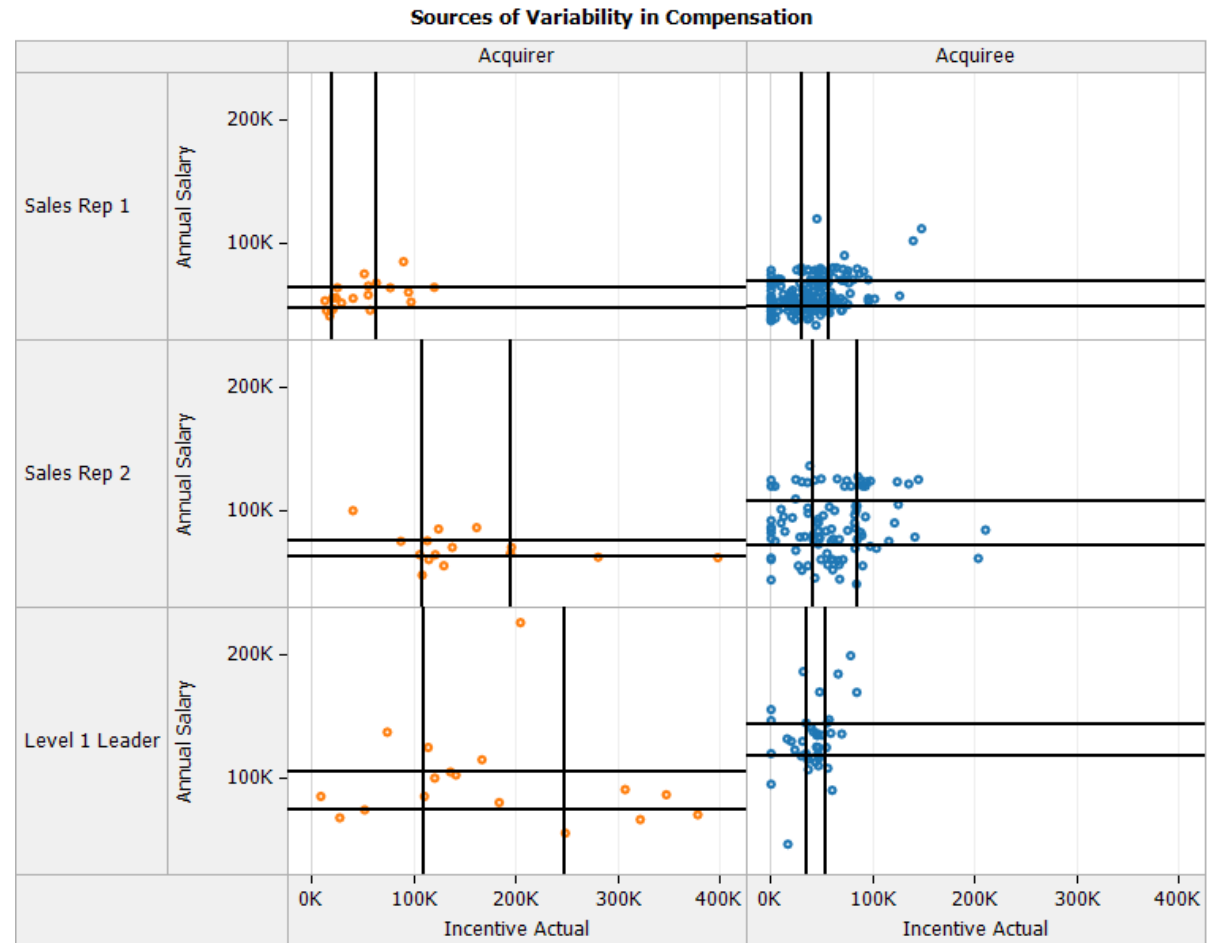
- Legacy company

Chart

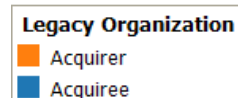
- Plot actual variable pay vs. base pay
- Add reference lines at 25th and 75th percentiles

You can tell at a glance

- Where variable pay is the primary source of variability in pay, and where base contributes as much or more



Black lines are 25th and 75th percentile values.



Group sales people by

- Role category
- Legacy company

Use color to show

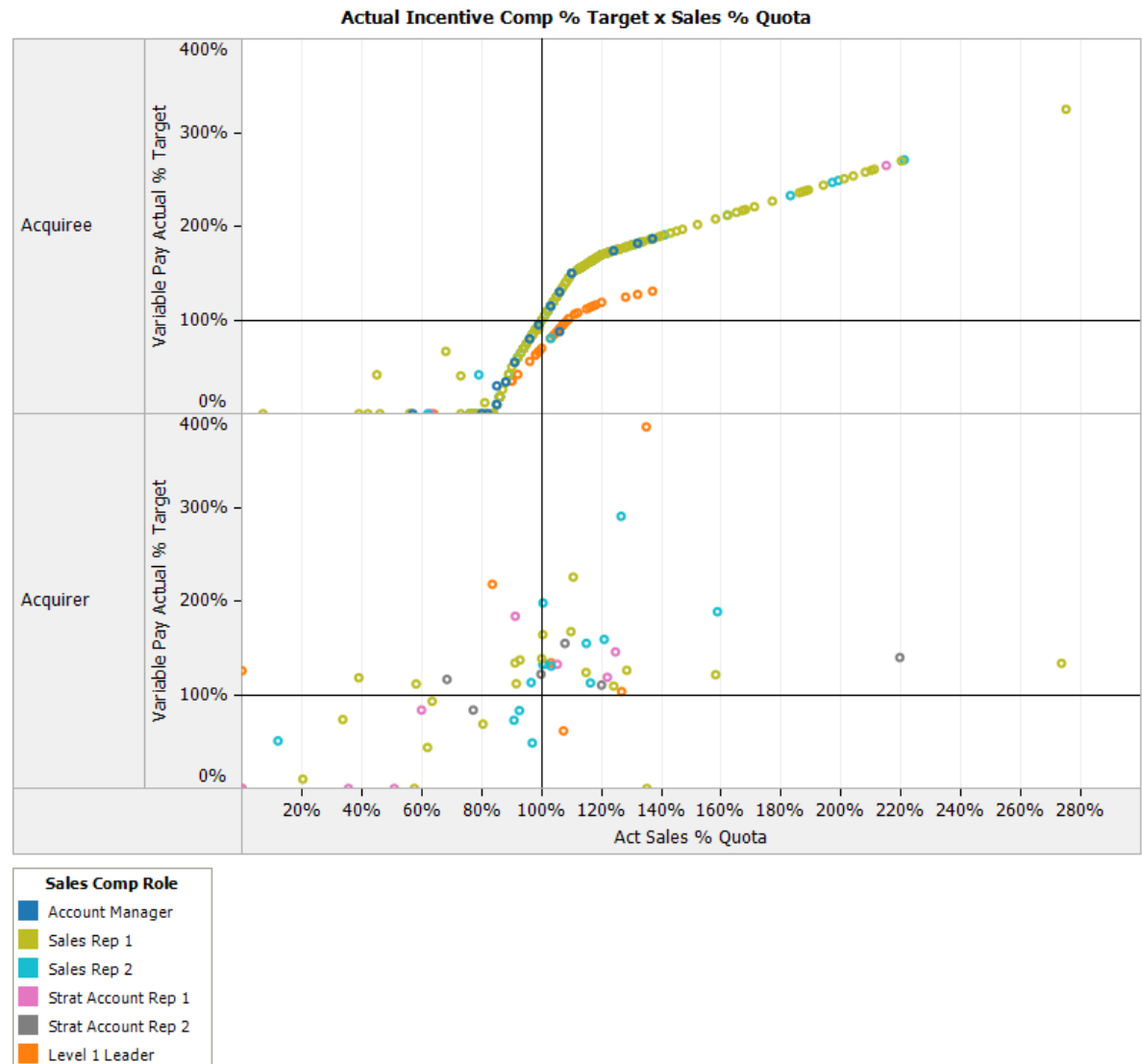
- Sales role

Chart

- Plot actual variable pay vs. quota attainment
- Add reference lines at 100%

You can tell at a glance

- How much quotas matter to total compensation
- Whether management discretion is liberally applied



Group sales people by

- Role category
- Legacy company

Use color to show

- Legacy company

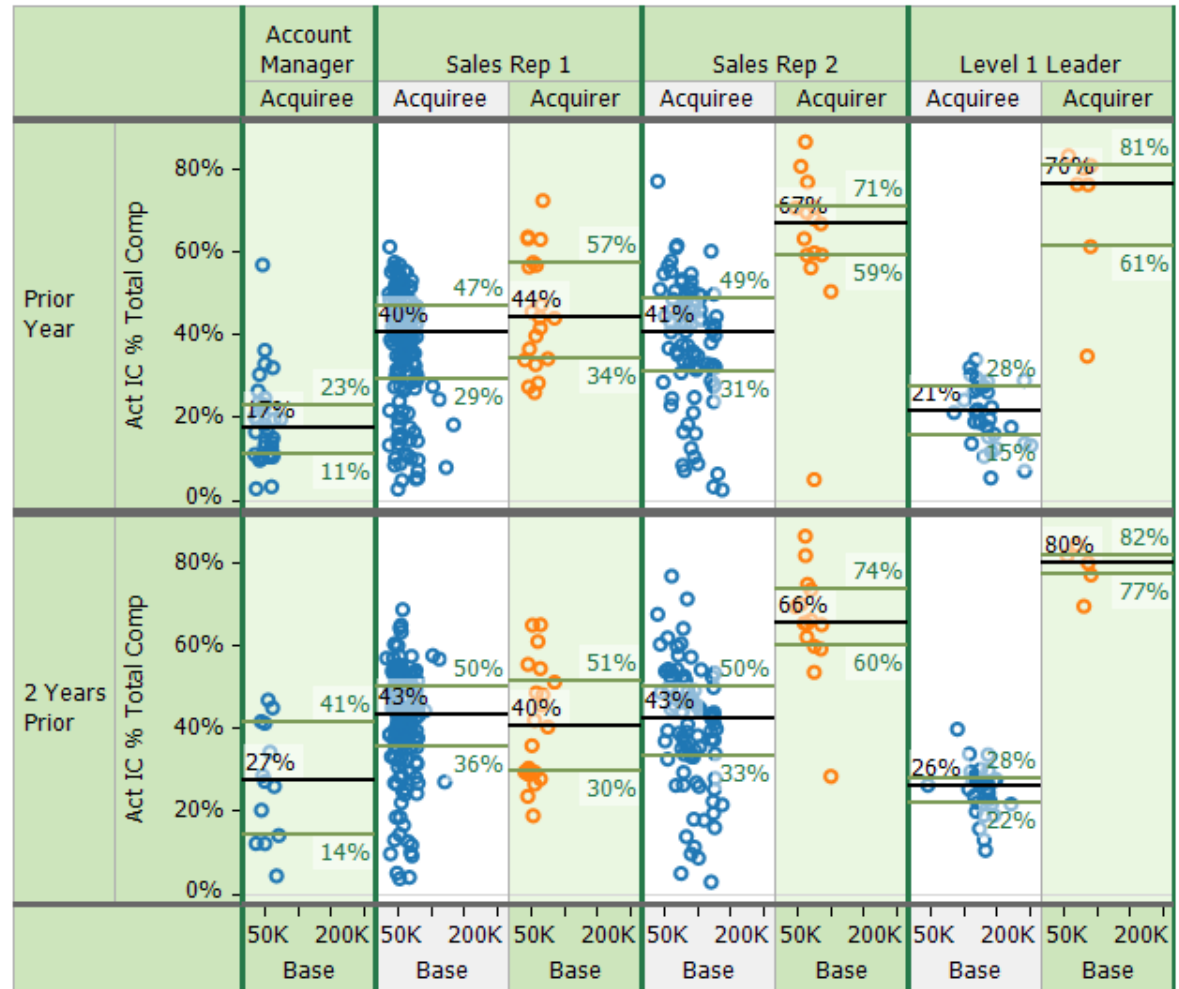
Chart

- Pay mix (Actual incentive % Total Comp) vs. Base, by year
- Add reference lines at median, 25th and 75th percentiles

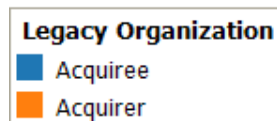
You can tell at a glance

- How pay mix compares between companies
- How stable pay mix has been across years
- If people with higher bases tend to have higher or lower incentive payouts

Actual Incentive Pay % Total Comp x Base Pay Level



Black line is median. Green lines are 25th and 75th percentiles



Group sales people by

- Role category
- Legacy company

Use color to show

- Each person separately

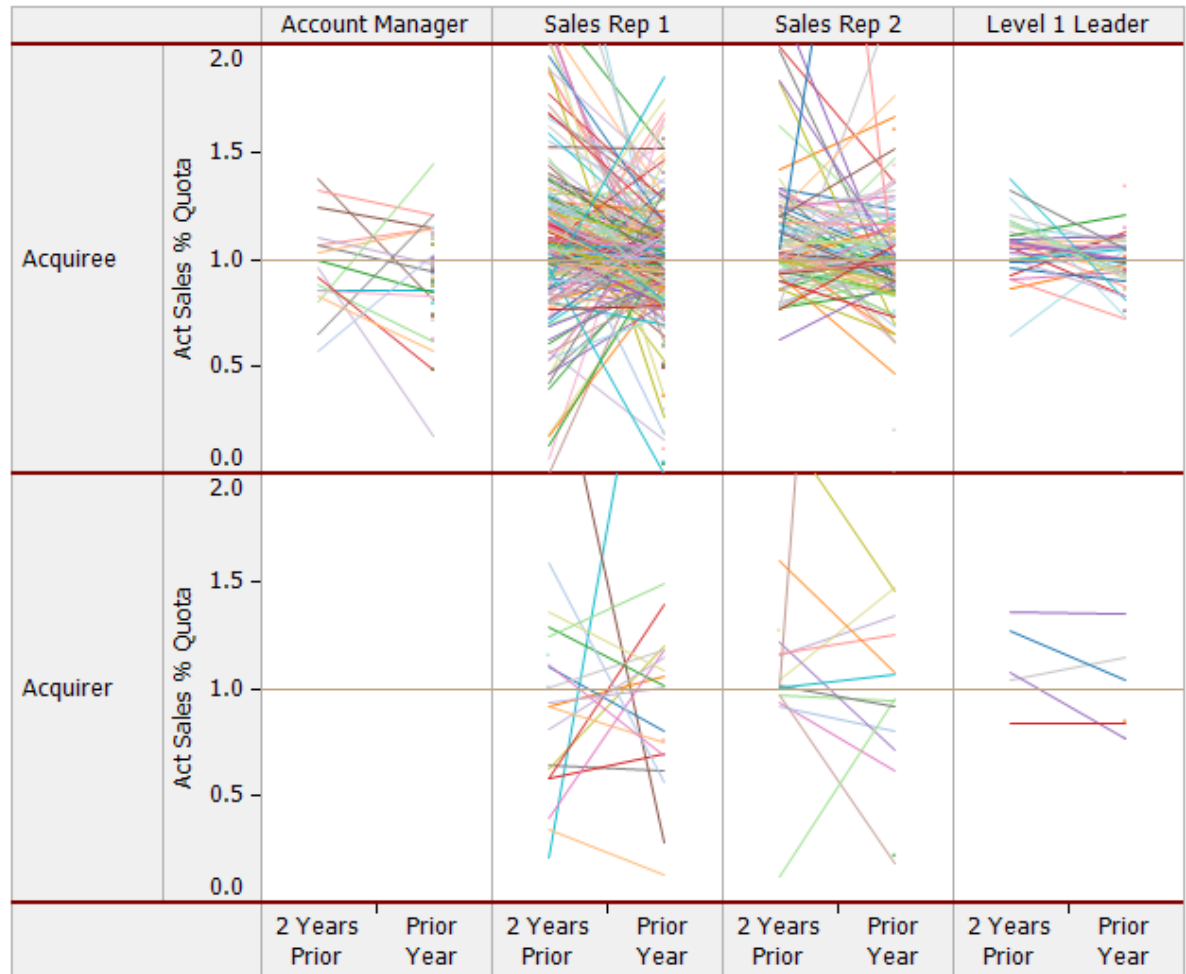
Chart

- Actual sales % quota for two consecutive years

You can tell at a glance

- If performance against quota is overall up or down year over year
- If top performers one year are also top performers the next year

Year to Year Change in Quota Attainment by Person



Each line represents one person.

Group sales people by

- Role category

Use color to show

- Selling roles

Chart

- Actual sales % quota for two consecutive years on an XY plot

You can tell at a glance

- If top performers one year are also top performers the next year



Each dot represents one person. Colors represent different selling roles.

Group sales people by

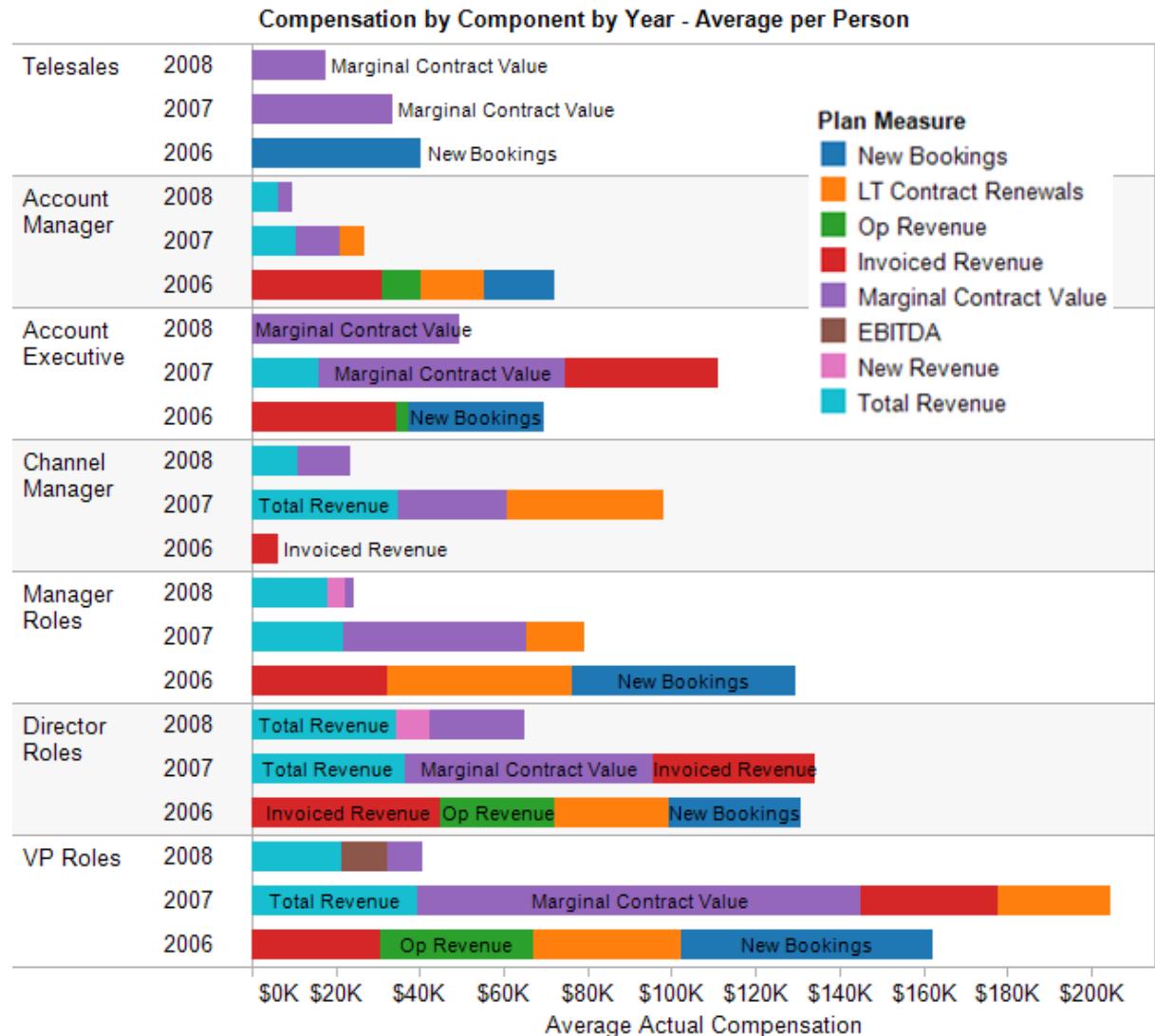
- Role category
- Year

Use color to show

- Plan measures

You can tell at a glance

- If variable pay has generally been up or down over the years
- How much plan measures have changed
- How consistent plan measures are across selling roles



The tool we use is Tableau, personal edition, v4.1
from Tableau Software, www.tableausoftware.com



To get the charts you want, you need to “stack” the data

One row for each

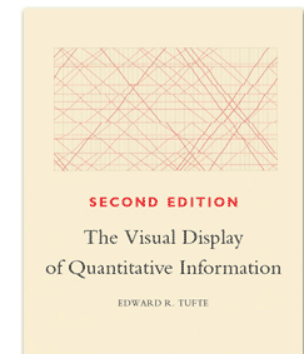
- Person
- Year (or quarter)
- Measure (including Base)

On each row provide

- Identifying information (business unit, hire date, employee ID, etc.)
- Performance goal (quota)
- Performance actual
- Target incentive
- Actual incentive

Another favorite reference:

[The Visual Display of Quantitative Information](http://www.edwardtufte.com) by Edward Tufte
see www.edwardtufte.com



About The Cygnal Group

The Cygnal Group is a consulting firm specializing in sales compensation plan design. We are based in Chapel Hill, NC and serve clients headquartered all over the U.S., and even some in Europe. Our practice spans large and small companies, public and private, global and locally focused.

Clients include very large companies (e.g., Home Depot, Comcast), mid-sized companies (e.g., Valassis, Misys, Thomson), game changers (e.g., Red Hat, Sensus Metering), and smaller companies (e.g., GXS, Prometric), and even some companies hiring their first sales person (e.g., Meritech, Magnet Street).

Donya Rose is the Managing Partner of The Cygnal Group. She speaks regularly to audiences of Business, Sales, and HR leaders, and has contributed to numerous articles on the subject of compensating the sales force. Prior to founding The Cygnal Group, Ms. Rose was a consultant in the Sales Rewards practice at Towers Perrin.

Learn more about our services, and read our sales comp blog at

www.cygnalgroup.com

Contact us at

info@cygnalgroup.com

929-933-2290