



# Scoping Questionnaire

COMPENSATION MANAGEMENT

# Sales Organization

SCOPING QUESTIONNAIRE

# Sales Organization

- ☐ How is the sales force organized?
  - ☐ Is the sales force reporting structure different from the selling structure?
    - ☐ How many levels are there for each?
    - ☐ What does each reporting structure look like?
    - ☐ Is the hierarchy balanced or ragged (i.e., does it skip levels)?
- ☐ How do you currently track individuals moving throughout the year, especially when managing assignments?
  - ☐ Does your planning process require accommodating movements, or is reporting the primary requirement?
- ☐ Does your organization have overlay specialists?
  - ☐ How are they assigned (e.g., geo, industry, products, etc.)?
- ☐ How are the quota-carrying reps identified?

# Compensation Plans

SCOPING QUESTIONNAIRE

# Compensation Plans

- ☐ Do you plan to assign and/or maintain compensation plans?
- ☐ Please describe the nature of the compensation plans. Are the necessary inputs included in the planning process for their assignment?
- ☐ If an individual changes compensation plans throughout the year, does that impact their quota?
  - ☐ Do you need to track these changes?
- ☐ How many compensation roles and plans do you have today?
  - ☐ Are new plans added annually?
- ☐ Is the timing commission paid on invoice or collection?
- ☐ How are commissions paid in advance (draws) accounted for and settled against actual earnings?
- ☐ Are sales commission amounts recorded in multiple currencies?
- ☐ What are the quota attainment rules including minimum thresholds, accelerators, rate caps, etc.?
- ☐ Do commissions include one-time payouts (SPIFFs)?
- ☐ Are commissionable amounts based on metrics other than revenue (e.g., margin, discounts, territory / region / team assignments & attainment)?
- ☐ Please explain the difference between target and quota and how each is used in the commission crediting and calculation process in your organization.

# Products

SCOPING QUESTIONNAIRE

# Products

- ☐ Is anyone compensated by product sales?
  - ☐ If yes, proceed with questions below
- ☐ Do you have bookings by product?
- ☐ Do you set targets at the product level?
- ☐ How many levels do you need for planning?
  - ☐ Is this consistent across the organization?
  - ☐ At what level of the product hierarchy will you import/input data for analysis?
- ☐ Do you plan for every product, or a subset of products?

# Data

## SCOPING QUESTIONNAIRE



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# Data



- ☐ How many people, managers, and quota-carrying reps are in your sales hierarchies?
- ☐ How many accounts need to be planned? What is your expected account growth in the next 1 to 3 years?
- ☐ How many products need to be planned? What is your expected product growth in the next 1 to 3 years?
- ☐ How many years of historical data is required?
- ☐ How many future periods do you need to plan?
- ☐ How granular does the timescale need to be (e.g., year, quarter, month, week)?
- ☐ Do you require versioning of all or part of your data set?
  - ☐ If so, how many versions do you need?
- ☐ What data extracts do you expect (e.g., rep account assignments, compensation plan export, etc.)?
  - ☐ How often do you need them?
- ☐ Which upstream and downstream systems need to be integrated?

- ☐ Do these integrations need to be automated? Or will they be manual?
  - ☐ Are there any data integration tools in place?
  - ☐ Are there any e-signature tools in place?
- ☐ How often are data transfers / syncs conducted?
- ☐ Do you have a data mart / data lake strategy currently in place?
- ☐ What are commissionable sales based on: e.g., customer, product, territory/geography, sales team, etc.? Please describe the number of items in the lists and hierarchies.
- ☐ What is the payroll processing environment for commissionable pay?
- ☐ Please provide a data flow schematic and system architecture diagram

# Users

SCOPING QUESTIONNAIRE

- ☐ What are the types of roles of the anticipated users of Anaplan?
  - ☐ How many users do you anticipate for each type of role?
- ☐ How will each role interact with the model?
  - ☐ Are there individuals who fit into more than one role?
- ☐ How are the users accessing the platform? Via Single Sign-On (SSO)? Or else?
- ☐ What level(s) of hierarchies should the permission be granted?

# User Interface

SCOPING QUESTIONNAIRE

# User Interface Design

- ☐ Who are the end users?
- ☐ What is their technical aptitude?
- ☐ What are some examples of current user interfaces?
- ☐ Do the users use PC, Mac, or both?
  - ☐ What is the typical resolution of the users' computer screen?
  - ☐ What browser(s) are used?
- ☐ Are other devices used? If so, what (e.g., mobile, tablet, TV screen, double screen, etc.)?

# Other Considerations

SCOPING QUESTIONNAIRE

# Other Considerations

- ☐ How would you measure success of your project? Which metrics do you need to achieve?
- ☐ How are the decisions made in your organization?
  - ☐ What are the technical criteria to make a decision?
- ☐ Who will sign off on moving forward at each stage?
- ☐ Who is in the power base?
- ☐ What is the consequence of doing nothing?
- ☐ Who is willing to carry the Anaplan flag internally?
- ☐ Who is your executive sponsor?
- ☐ Who is your project sponsor / business owner?
- ☐ Who are the model owner(s)? Model builder(s)?
- ☐ Who will attend Anaplan training? How many people?
- ☐ Do you have change management resources who will help with training?
- ☐ How do you plan to train your end users?
- ☐ Users will need to have suitable access to modules, lists, versions and actions. Who will provision users?
- ☐ What is your desired go-live timing?