Sample Plans: Staffing Industry

Plan Summary

The Staffing industry is primarily involved in the management and provision of Human Resources for other businesses. This is primarily a services business, serving small to large businesses. The staffing industry mostly consists of small to medium businesses with very few large companies. The industry is very fragmented with companies specializing by the industries they serve or specializing by the type of staffing they provide. Staffing companies provide services such as recruiting, permanent employee placement, contract employee, temporary employee placement and related services. The staffing industry provides a critical service to the economy by bringing businesses and workers together either in permanent or temporary arrangements.

The sample plans are established to demonstrate the features of QCommission. If you are not sure how to generate some of the components of the plan, we highly recommend you to get assistance here at qc_support@cellarstone.com

Maintenance Data

The maintenance data are the preliminary data that are used in plan calculation rules to calculate the payout. This section covers all setup data necessary for processing.

Company

The company is named as Staffology, Inc.

Calendar

The calendar is set for the fiscal year 2006. The calendar starts from January 1, 2006 in a monthly frequency.

Payee

A payee may be a Sales Representative or a Sales Manager who is associated to a plan in order to calculate the payout.
Payees are associated with the specific organizational units. The payee data are given below:

Payee Type	Payee Id	Name	Sales Organization	Job Category
Sales Rep	Jliggett	John Liggett	North-CA	Recruiter
Sales Rep	Bmistal	Barb Mistal	South-CA	Recruiter
Sales Rep	Lmadison	Loren Madison	North-CA	Accountant Manager
Sales Rep	Mwest	Mark West	South-CA	Accountant Manager
Sales Rep	LWarden	Lucy Warden	Staffology	Consultant
Sales Manager	Pete Cramden	Pete Cramden	Staffology	Manager
Sales Rep	WBerg	Walter Berg	South-CA	Consultant

Sales Organization

The sales organization has three layers like territory, region and company.

Unit Id	Layer	Name
Staffology	Level 1	Staffology, Inc.
West	Level 2	Western
North-CA	Level 3	Northern California
South-CA	Level 3	Southern California

Customer

The customers are organized into two layers, customers and customer sub-groups.

Customer Id	Layer	Name
All Customers	Customer Level 1	
Healthcare	Customer Level 2	Healthcare
Catholic West	Customer Level 3	Catholic West Hospitals

HealthSouth	Customer Level 3	Health South Inc
HiTech	Customer Level 2	High Tech
IBM	Customer Level 3	Acme Maintenance
TechWorks	Customer Level 3	TechWorks, Inc.

Product

The products/services represent types of services provided.

Product ID	Layer	Description
Consulting Revenue	Product Level 1	Consulting Revenue
Placement	Product Level 1	Placement
SDFDSFDSFD	Product Level 1	
Lwarden Consulting	Product Level 2	Lwarden Consulting
Wberg Consulting	Product Level 2	Wberg Consulting
Permanent Placement	Product Level 2	Permanent Placement
Temporary Placement	Product Level 2	Temporary Placement

Incentive

The incentives are paid based on the performance of a payee. Incentives differ from one company to another. A payee can have more than one Incentive, and an incentive can have more than one rules associated with it. A performance category is attached to an incentive; used to evaluate, or measure the performance of the payee.

Incentive
Monthly Revenue Override
Monthly Billed Hours Incentive
Monthly Billings Revenue Commission
Monthly Consultant Revenue Commission
Monthly Job Placement Commission
Monthly Recruiter Placement Incentive

Group

The groups here represent the type of position being placed.

Group	Layer	Group Name
Positions	Group Level 1	Positions
Administrative	Group Level 2	Administrative
Executive	Group Level 2	Executive
Professional	Group Level 2	Professional

Performance Category

The incentive is designed to incent the following performance categories.

Performance Category
Billing Revenue
Billing Hours
New Customer

Transactions

The invoice data is designed to affect the plans listed in this document. The data is grouped by processing period. The data is designed to cover certain situations such as multiple invoice lines, dates being different than processing periods, etc.

CellarStone Inc.

Sample Plans: Staffing Industry

Per	Date	Inv #	Line #	Customer	Product	Sales_Amt	Sales Rep	Group_ID	Quantity	Territory
1	04-Jan-06	AA03	1	IBM	Wberg Consulting	20000			180	
1	04-Jan-06	AA02	1	Catholic West	Lwarden Consulting	8000			80	
1	04-Jan-06	AA01	1	HealthSouth	Lwarden Consulting	8000	Bmistal		80	South-CA
1	05-Jan-06	AD01	1	HealthSouth	Permanent Placement	25000	Mwest	Administrative	1	South-CA
1	05-Jan-06	AC01	2	HealthSouth	Permanent Placement	20000	Lmadison	Administrative	1	North-CA
1	05-Jan-06	AC01	1	HealthSouth	Permanent Placement	20000	Lmadison	Administrative	1	North-CA
1	10-Jan-06	AD01	2	HealthSouth	Permanent Placement	25000	Mwest	Administrative	1	South-CA
1	10-Jan-06	AC02	1	HealthSouth	Permanent Placement	20000	Lmadison	Professional	1	North-CA
1	30-Jan-06	AD03	1	HealthSouth	Permanent Placement	25000	Mwest	Professional	1	South-CA
1	30-Jan-06	AD02	1	HealthSouth	Permanent Placement	25000	Mwest	Professional	1	South-CA
1	30-Jan-06	AC03	1	HealthSouth	Permanent Placement	20000	Lmadison	Professional	1	North-CA
1	31-Jan-06	AA01	2			0			0	

Plans

These plans demonstrate various features of QCommission product used in the Staffing Industry. These plans are not intended to be comprehensive; they demonstrate the suitability of QCommission for similar plans.

Recruiter Plan (PL01)

This plan is applicable for Recruiters in the company. The recruiters are basically paid a flat fee for each position they fill. The flat fee can vary by type of job position being filled.

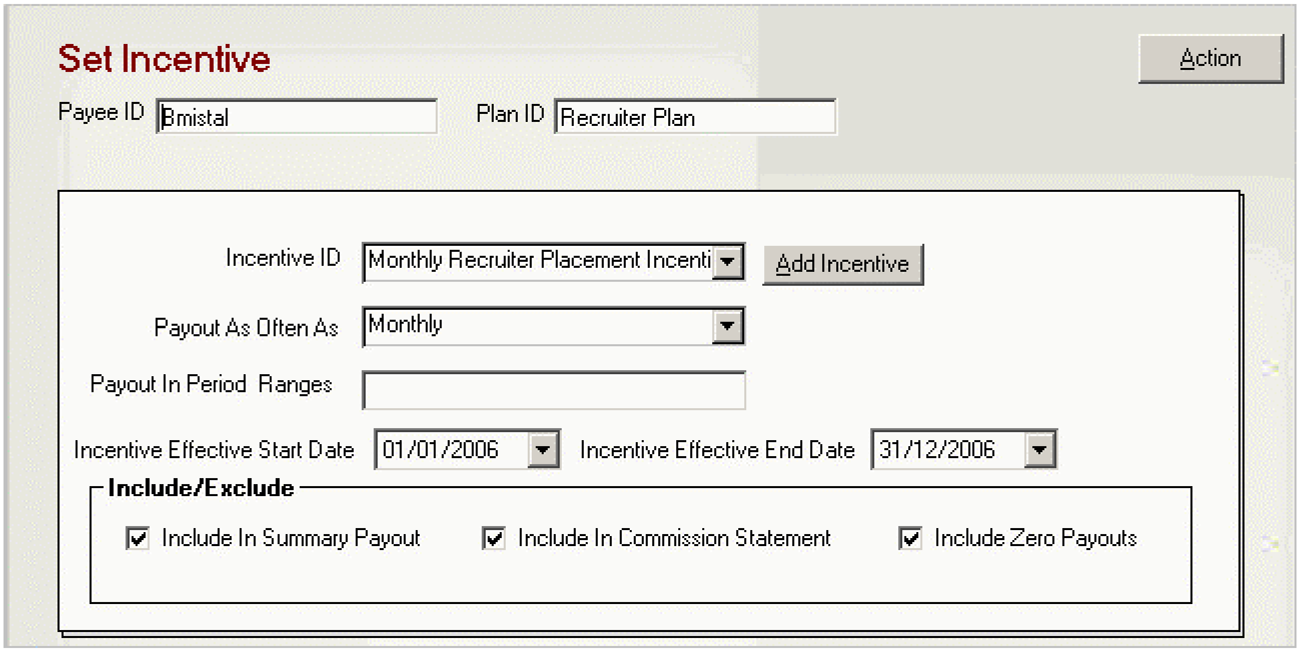
Monthly Recruiter Placement Incentive

This incentive is paid each month. The Recruiter is eligible to get payment for any placement with the Recruiter's Id on the transaction. Recruiters do not have quotas. The Recruiter gets an incentive based on the type of positions being filled.

Rates are:

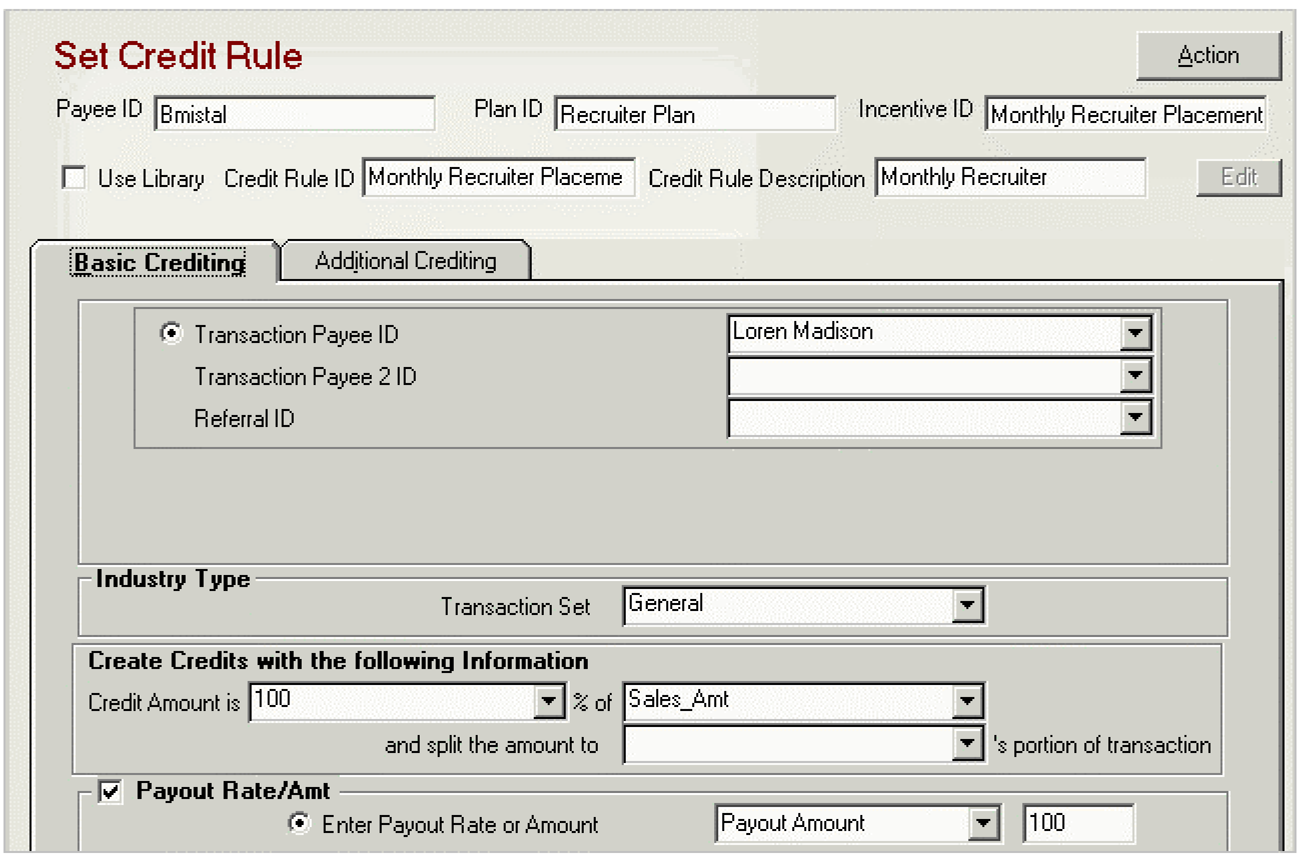
Position	*Rate*
Administrative	$100
Professional	$150

The incentive ID as 'Monthly Recruiter Placement Incentive' is chosen in the **Set Incentive** form. The monthly frequency is set in the 'Payout As Often As' field.
The incentive is paid each month. In the Include/Exclude, the options 'Include In Summary Payout", "Include in Commission Statement" and "Include Zero Payouts" are checked to include the incentives in the summary payout process, commission statement report and zero payout process.

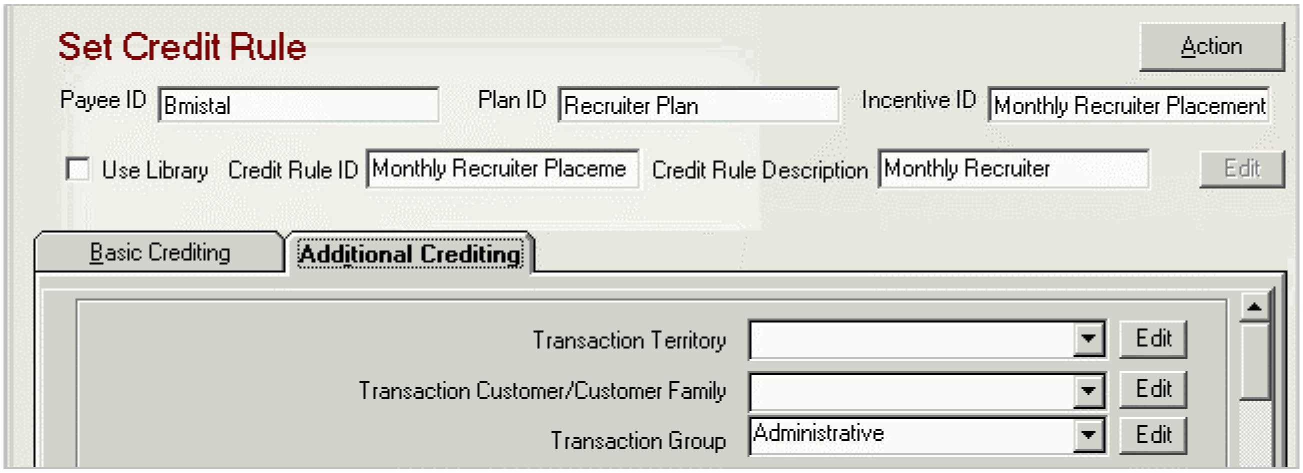


Set Credit Rule1: Monthly Recruiter Placement Incentive_rule1

In the Basic Crediting of the **Set Credit Rule** form, the transaction of the Payee ID selected as Loren Madison, will be considered for the calculation process. For each qualified transaction, the credit amount will be 100% of Sales Amount and the payout rate/amount is set as $100.

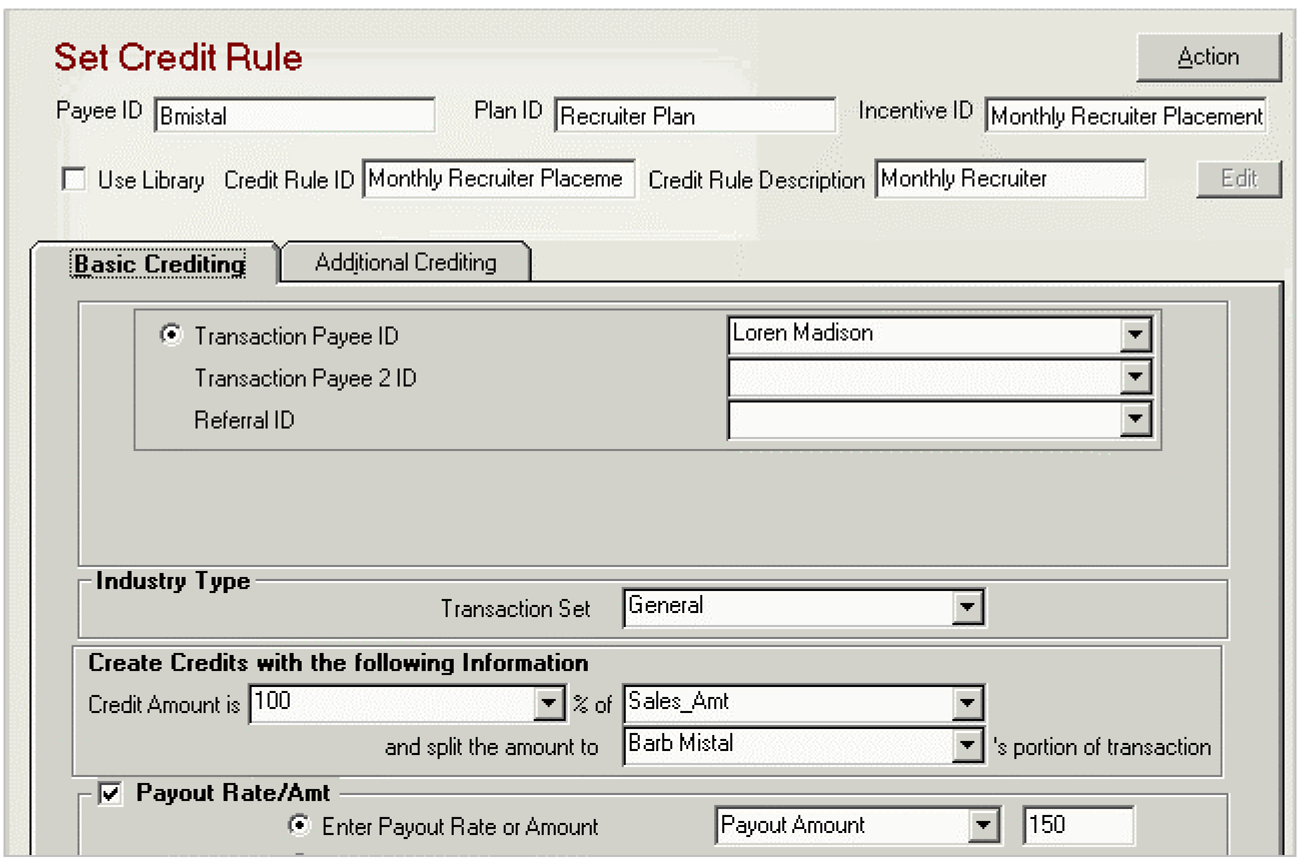


In the Additional Crediting of the **Set Credit Rule** form, the “Administrative” is selected in the Transaction Group.

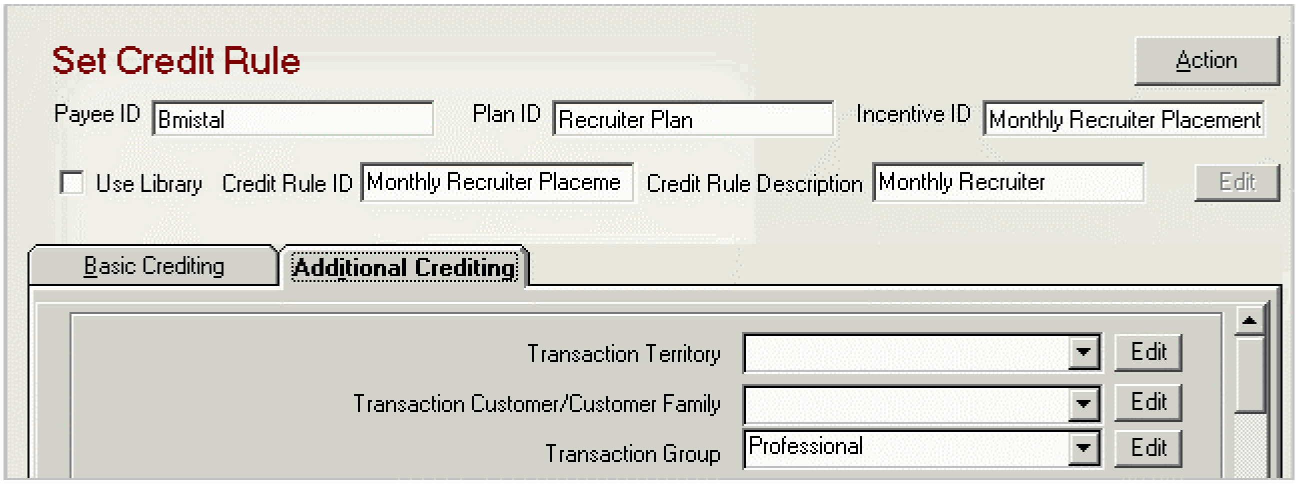


Set Credit Rule1: Monthly Recruiter Placement Incentive_rule1

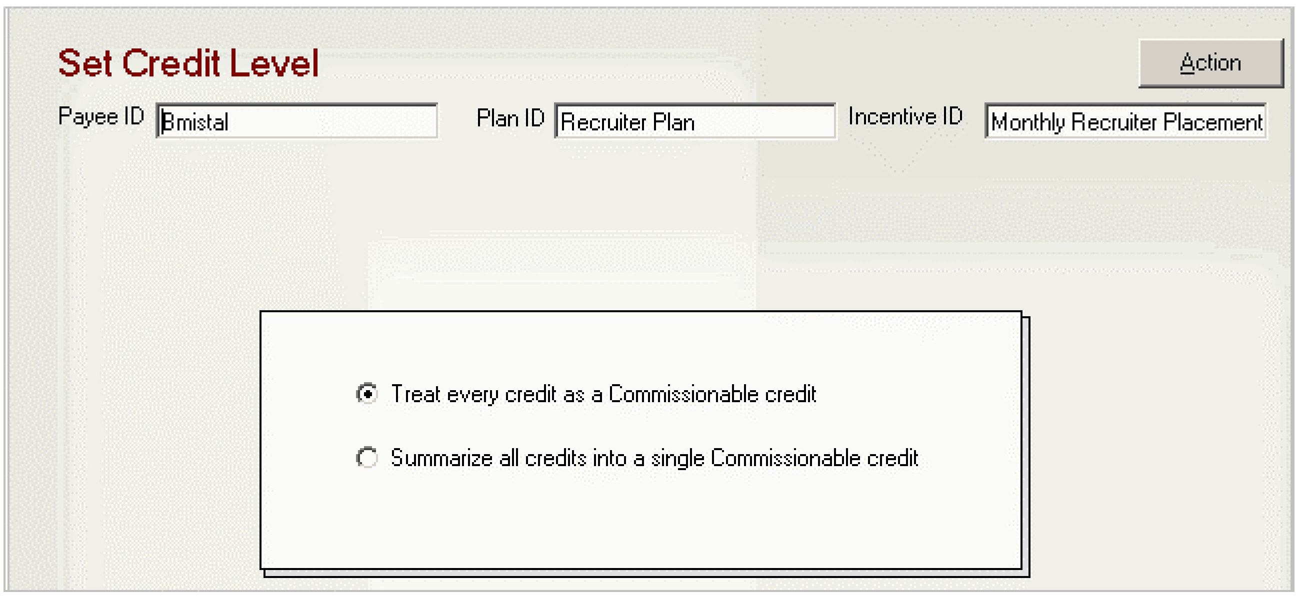
In the Basic Crediting of the **Set Credit Rule** form, the transaction of the Payee ID selected as Loren Madison, will be considered for calculation process. For each qualified transaction, the credit amount will be 100% of Sales Amount and the payout rate/amount is set as $150.



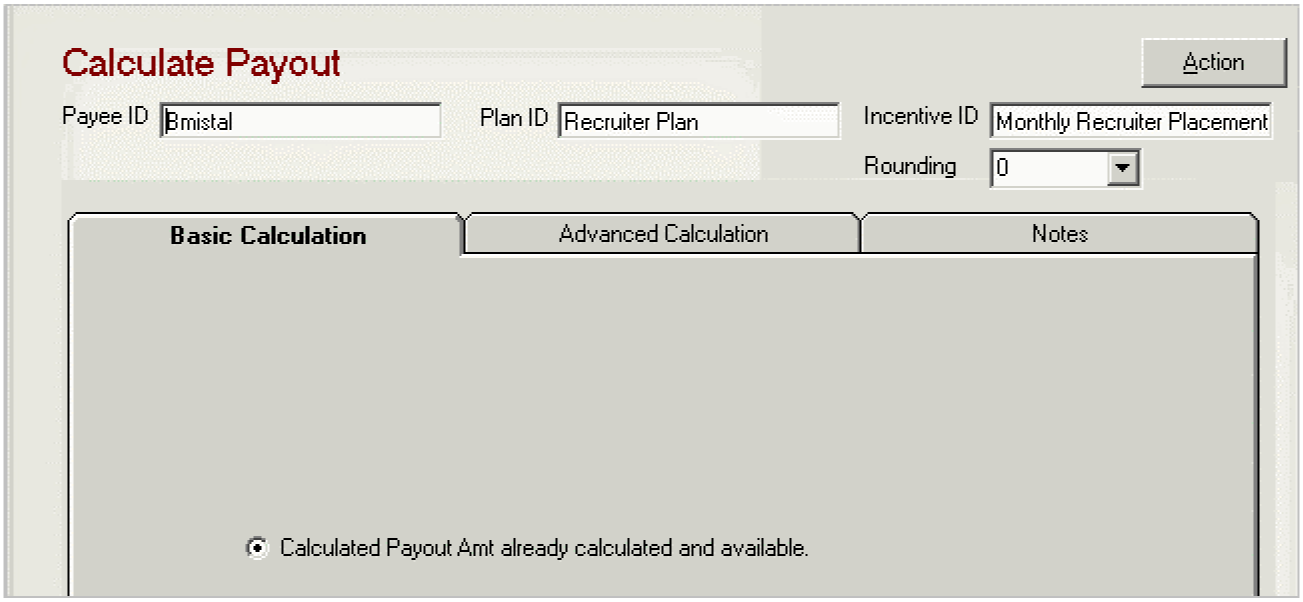
In the Additional Crediting of the **Set Credit Rule** form, the “Professional” is selected in the Transaction Group.



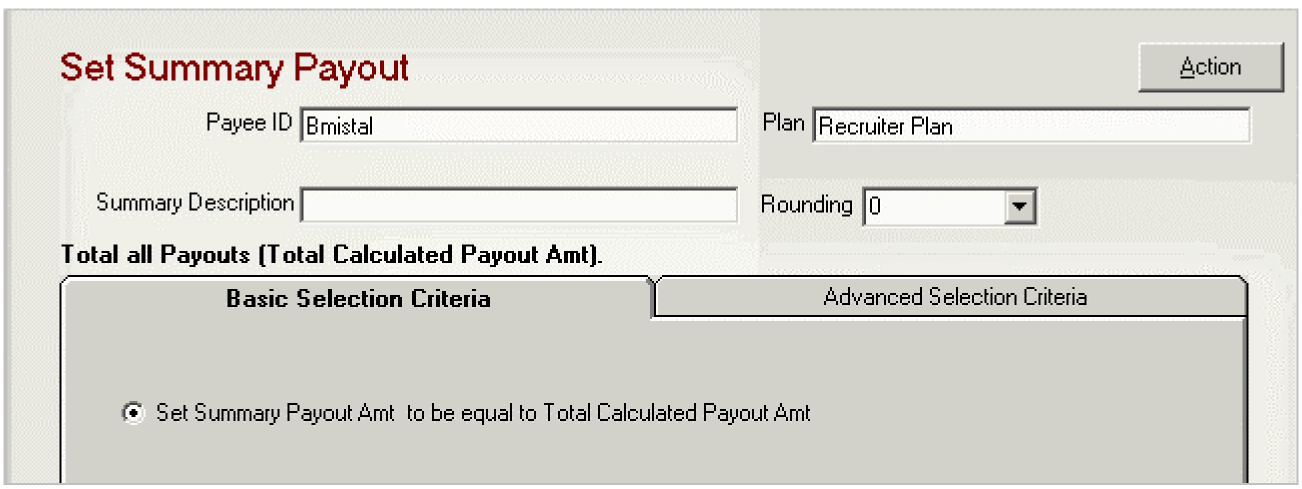
In the **Set Credit Level** form, the "Treat every credit as a Commissionable credit" radio option is selected.



In the **Calculate Payout** form, the 'Calculated Payout Amt already calculated and available' radio option is selected as a criterion to calculate the payout amount.
For this incentive plan, there are no draw/cap amounts set to adjust against his earnings.



In the **Set Summary Payout** form, the "Set Summary Payout Amt to be equal to Total Calculated Payout Amt" radio option is selected.



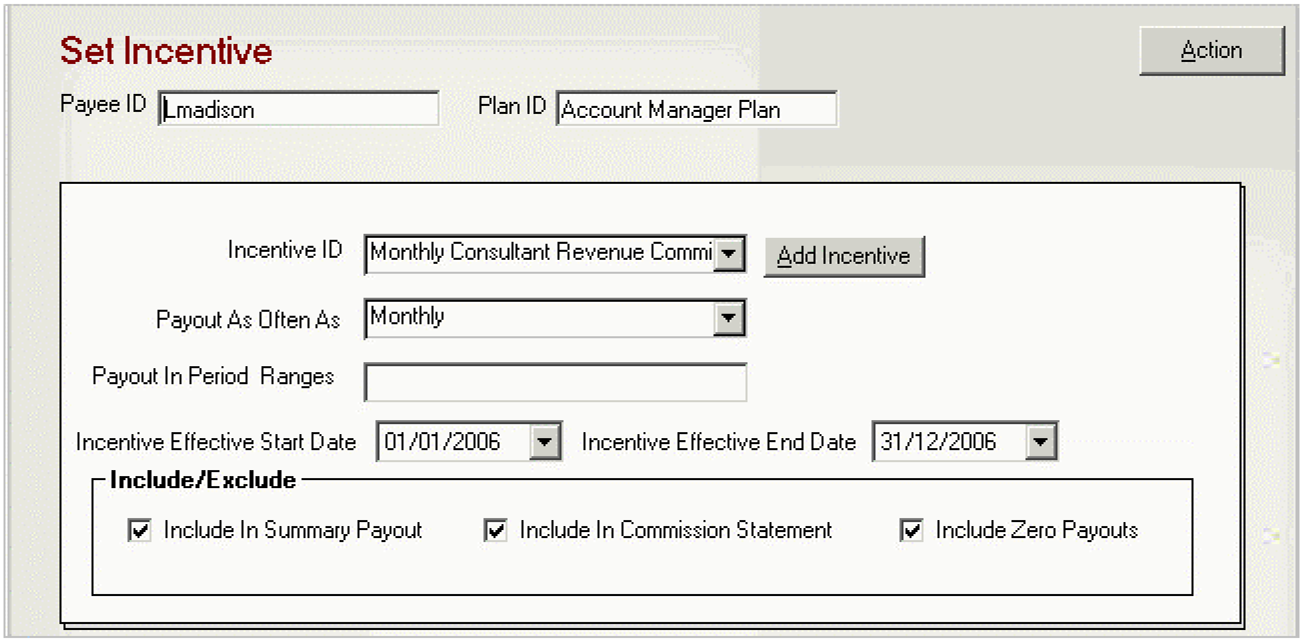
Account Manager Plan (PL02)

This plan is applicable for Account Managers. This plan has multiple incentives payable at different frequencies. This plan demonstrates use of quotas and also payments by various thresholds and multiple calculations per invoice. Invoice selection is demonstrated by sales rep Id as well as by territory Id. Draws and Caps are demonstrated in this plan.

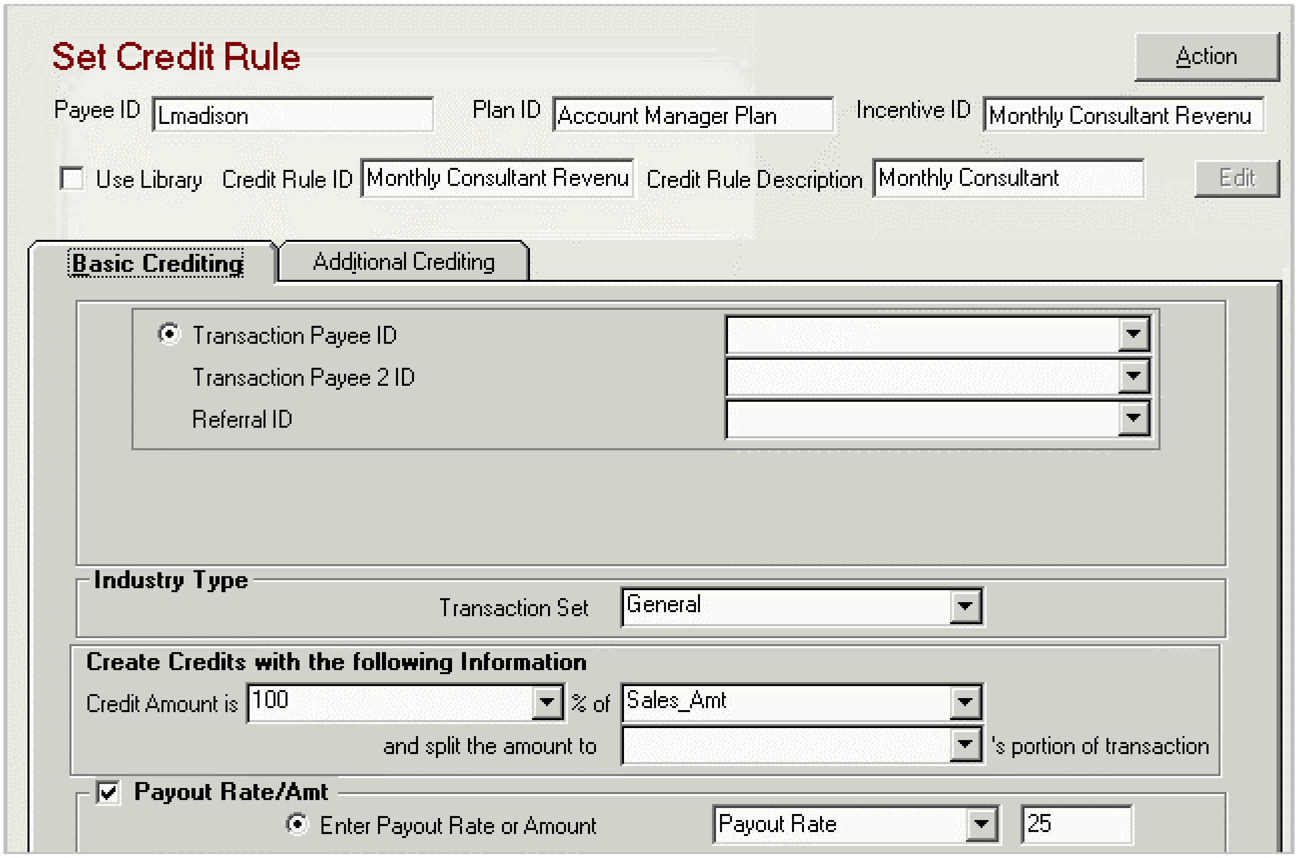
Monthly Consultant Revenue Commission

This incentive is paid each month. The Account Manager is assigned to specific customers. Any monthly revenue billing for the specific customer is credited to the Account Manager. Commissions are paid for each individual transaction based on the transaction's attainment against the monthly goal. An individual transaction can cross one of the rate thresholds and be eligible for payment under two ranges (threshold matrix).

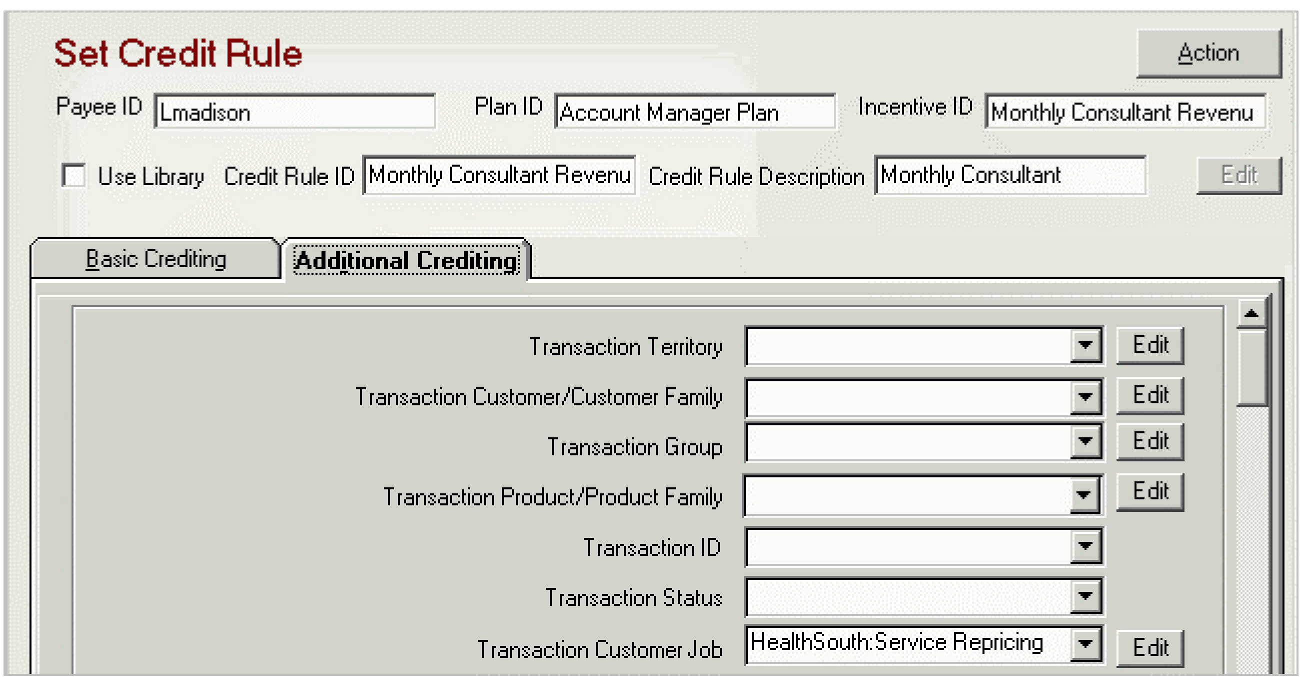
The incentive ‘Monthly Consultant Revenue Commission’ is chosen in the **Set Incentive** form. The monthly frequency is set in the ‘Payout As Often As’ field. Each month the sales rep will be incented with commission. In the Include/Exclude, the options ‘Include In Summary Payout”, “Include in Commission Statement” and “Include Zero Payouts” are checked to include the incentives in the summary payout process, commission statement report and zero payouts.



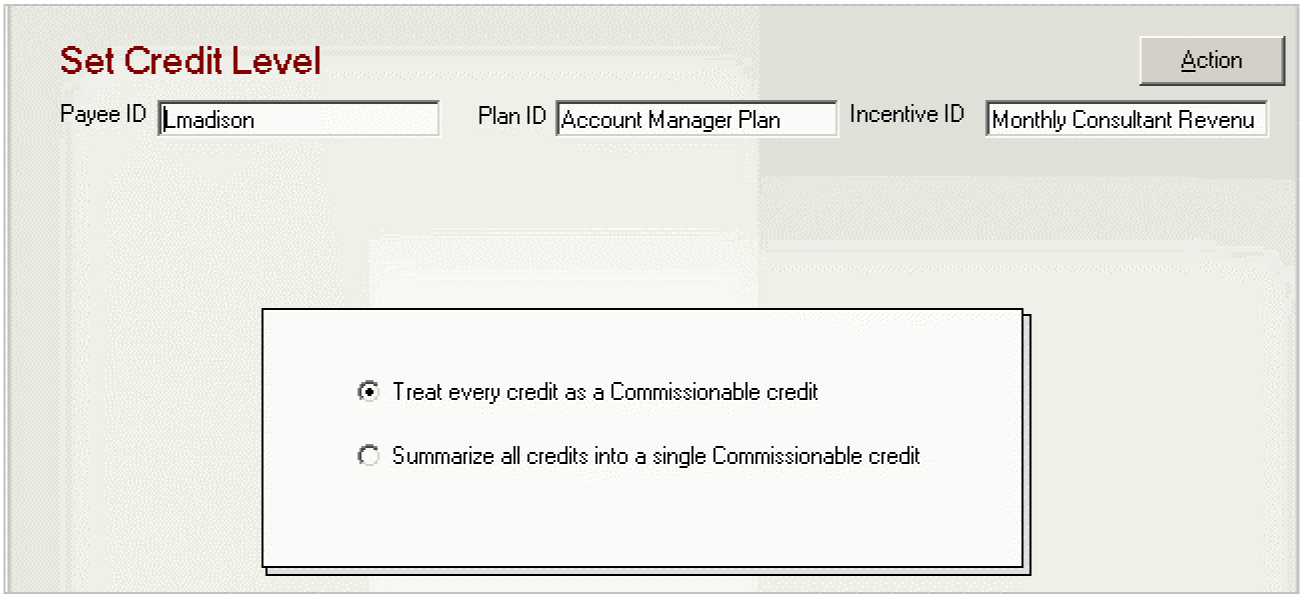
In Basic Crediting of the **Set Credit Rule** form, the transaction of the selected Payee ID will be considered for calculation process. For each qualified transaction, the credit amount will be 100% of Sales Amount and the payout rate/amount is set as $25.



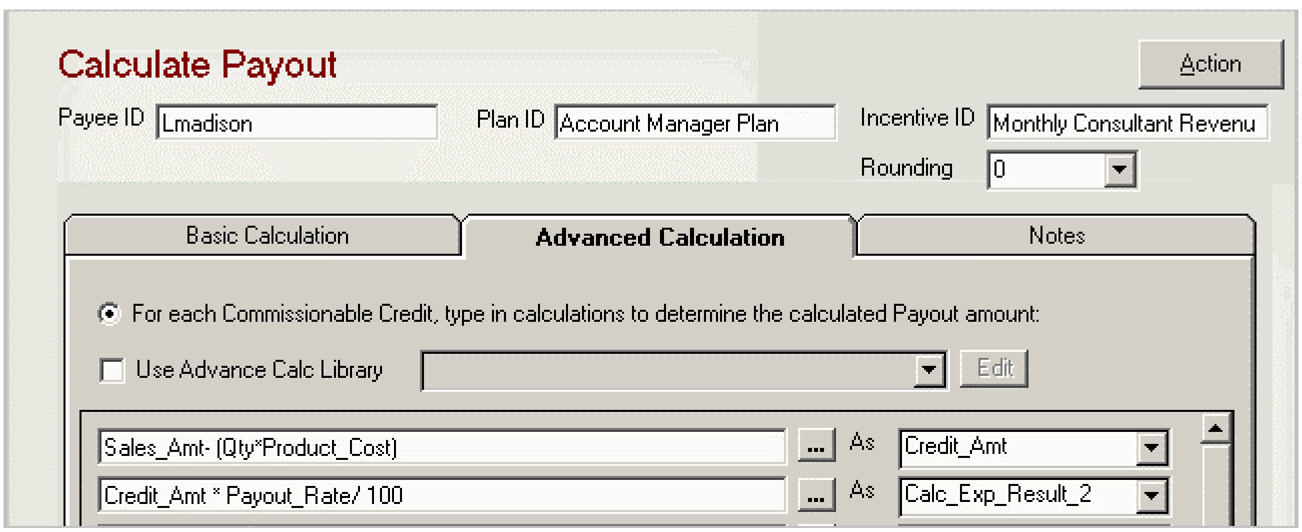
In the Additional Crediting of the **Set Credit Rule** form, a Transaction Customer Job as "HelalthSouth:Service Repricing" is selected from the pull-down list.



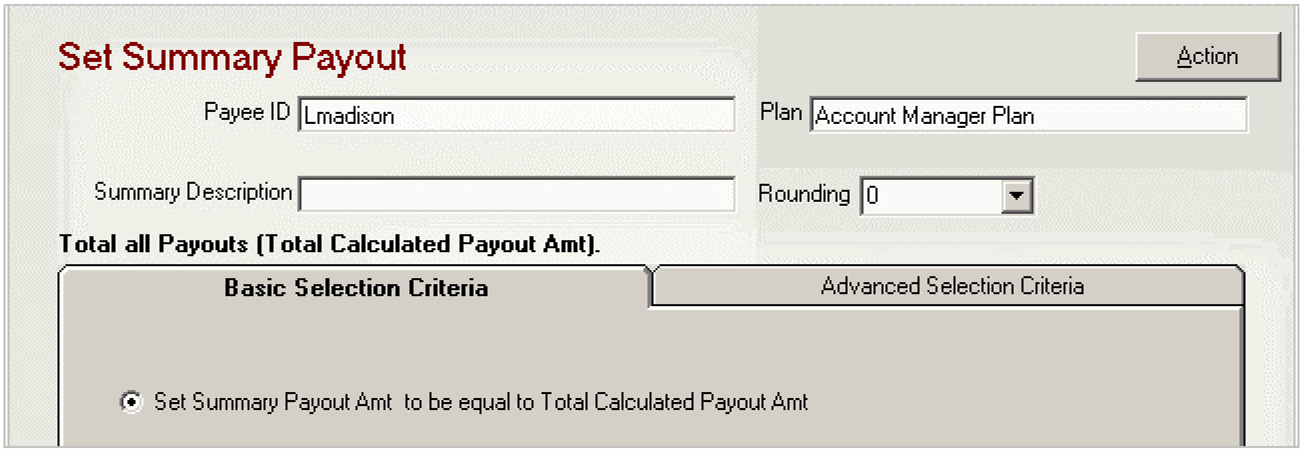
In the **Set Credit Level** form, the "Treat every credit as a Commissionable credit" radio option is selected.



In the **Calculate Payout** form, the 'Calculated Payout Amt already calculated and available' radio option is set as a criterion to calculate the payout amount.

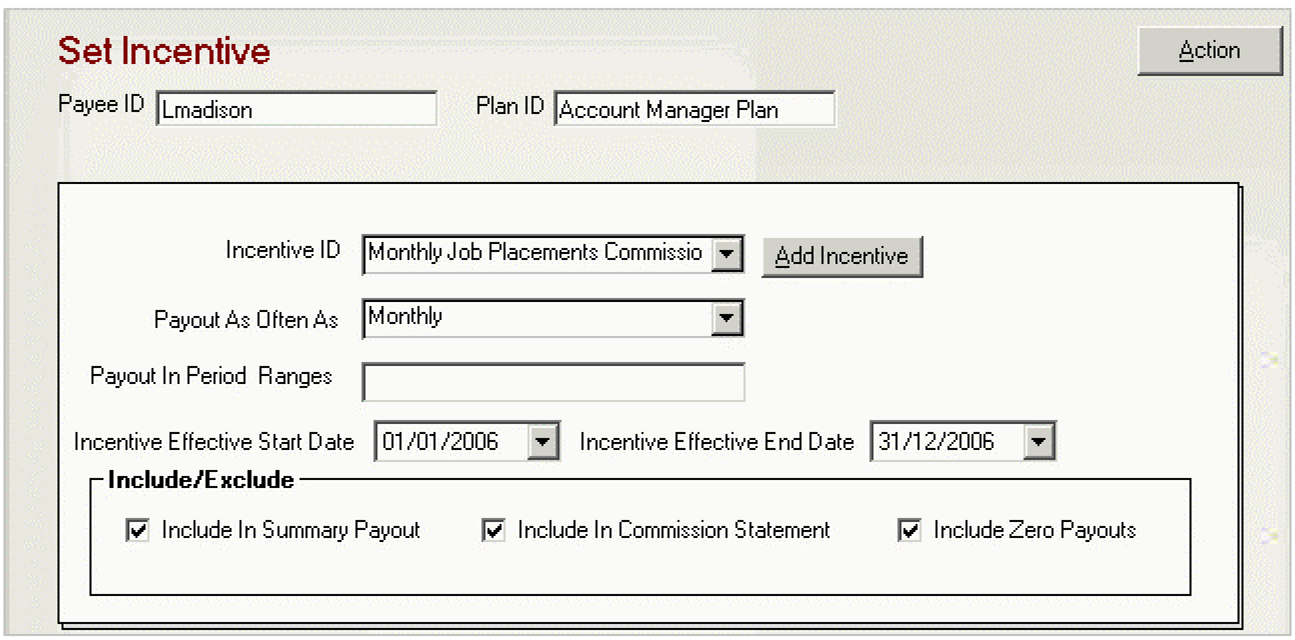


In the **Set Summary Payout** form, the "Set Summary Payout Amt to be equal to Total Calculated Payout Amt" radio option is selected.

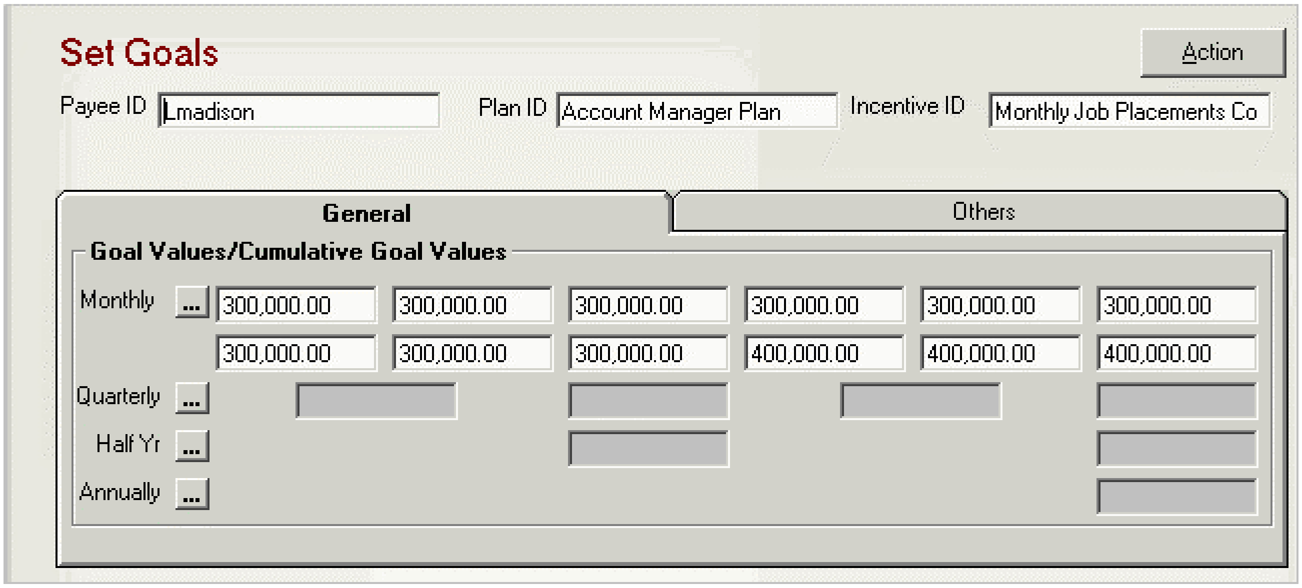


Monthly Job Placements Commissions

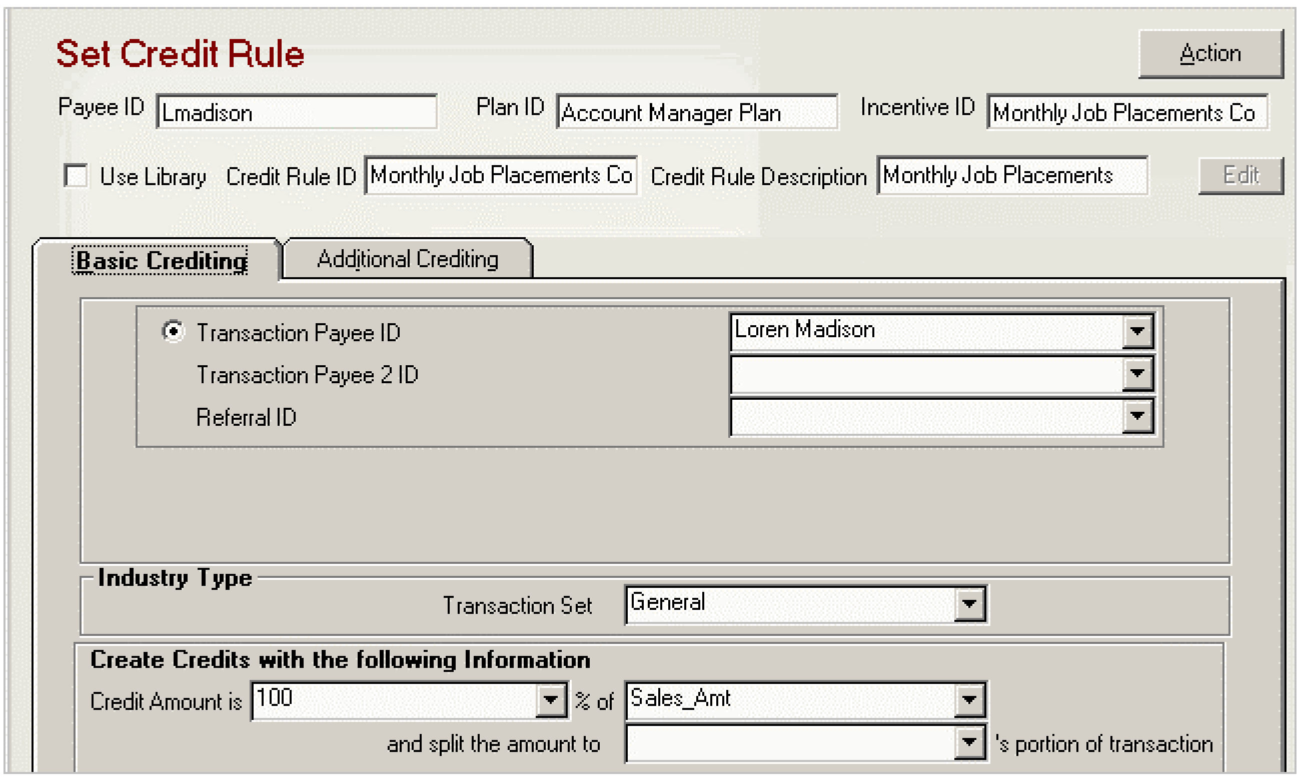
This incentive is paid each month. The Account Manager is assigned to specific customers. Any monthly job placement billing for the specific customer is credited to the Account Manager. The incentive 'Monthly Job Placements Commission' is chosen in the **Set Incentive** form. The monthly frequency is set in the 'Payout As Often As' field. Each month, the Account Manager will be incented with commission. In the Include/Exclude, the options 'Include In Summary Payout", "Include in Commission Statement" and "Include zero Payouts" are checked to include the incentives in the summary payout process, commission statement report and zero payout process.



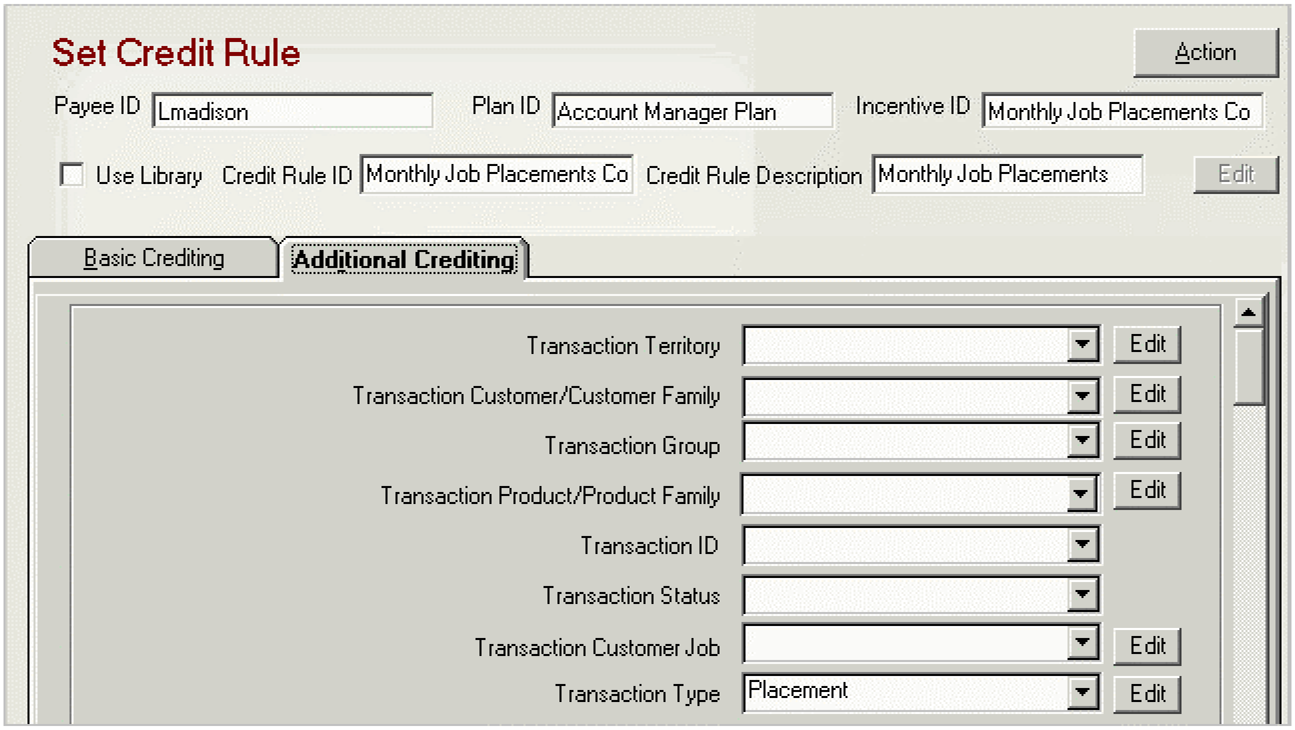
The quotas/goals are entered for 12 periods. This plan is designed to incent the Account Manager with commission for each month of the fiscal year (2006).
The monthly quotas for the Account Manager are given below in the picture:



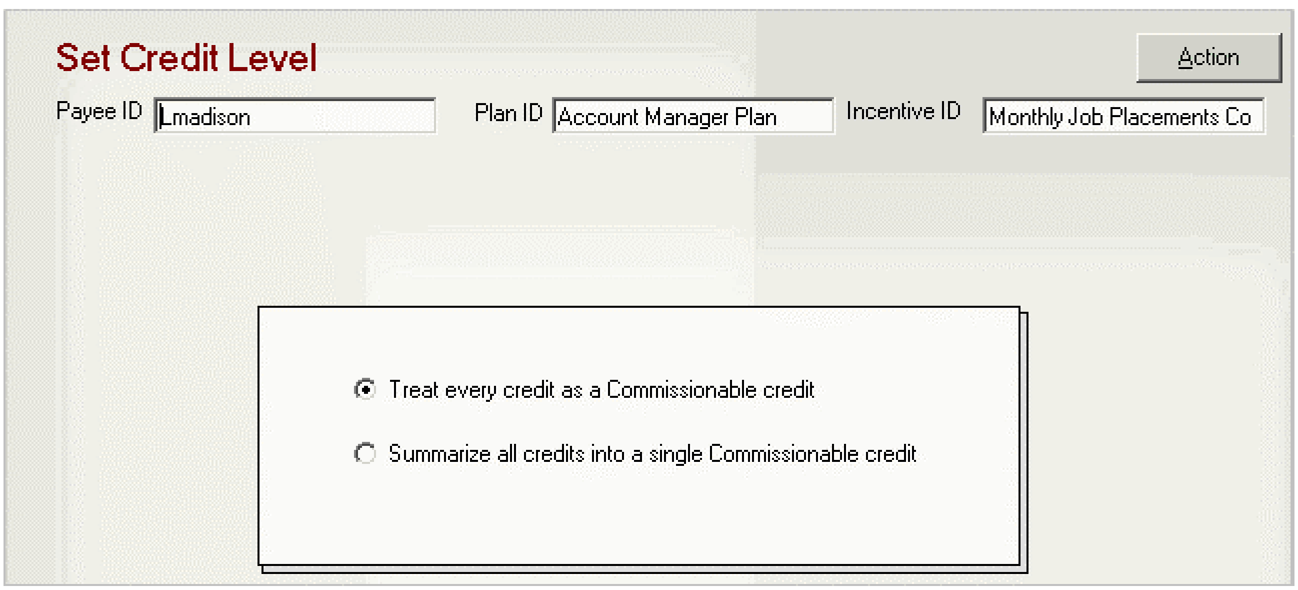
In Basic Crediting of the **Set Credit Rule** form, the transaction of the Payee ID selected as Loren Madison, will be considered for calculation process. For each qualified transaction, the credit amount will be 100% of Sales Amount.



In the Additional Crediting of the **Set Credit Rule** form, the "Transaction Type" as Placement is selected from the pull-down list.

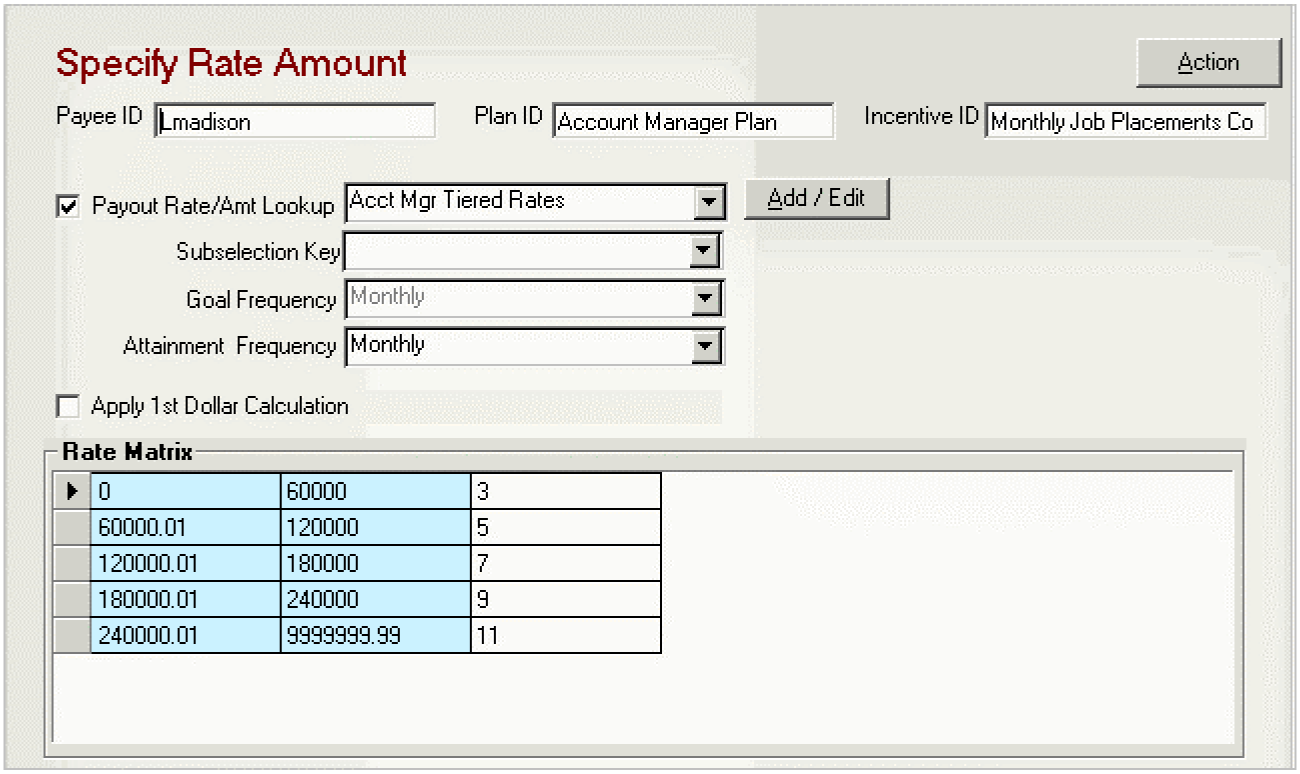


In the **Set Credit Level** form, the “Treat every credit as a Commissionable credit” radio option is selected.

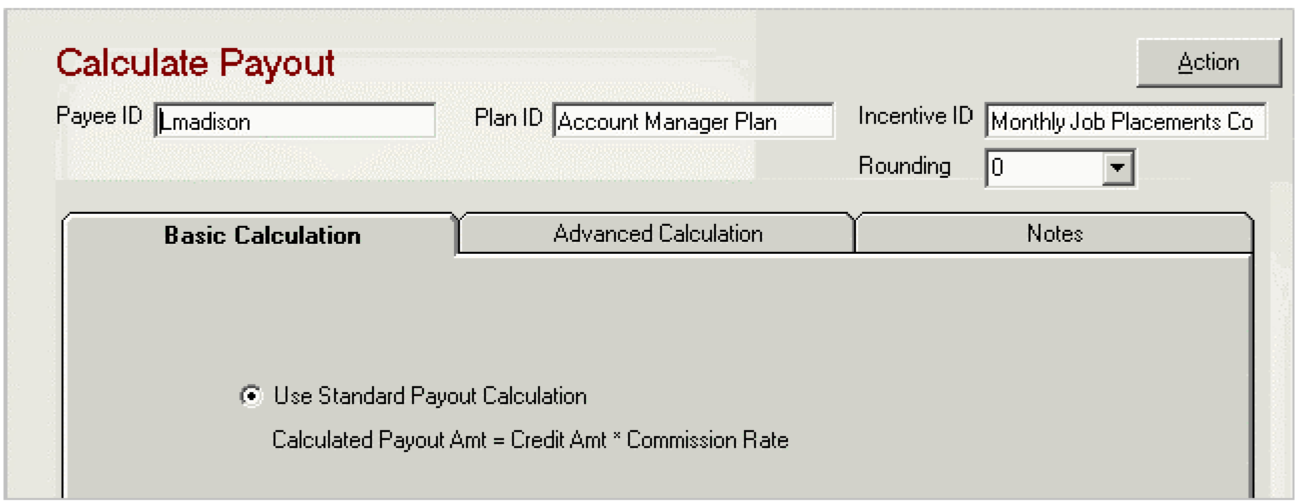


In the **Specify Rate Amount** form, the tier rate calculation is set to calculate the payout amount. Tier rate calculates the payout rate by comparing the ranges of attainment value and commission rate.

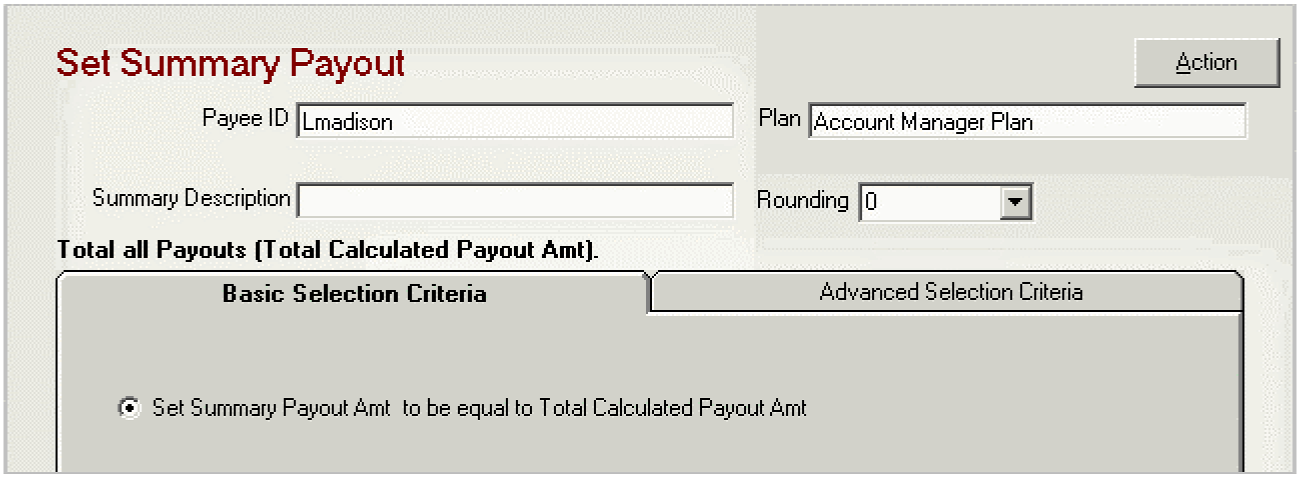
If the attainment value crosses the threshold, the Account Manager will be eligible for a split payout; the invoice amount that falls below the threshold gets the lower rate, the invoice amount that goes above the threshold gets the higher rate.



In the **Calculate Payout** form, the "Use Standard Payout Calculation" radio option is set to calculate the commission rate. The Manager is paid for each transaction that is associated to him.



In the **Set Summary Payout** form, the "Set Summary Payout Amt to be equal to Total Calculated Payout Amt" is selected to calculate payout.

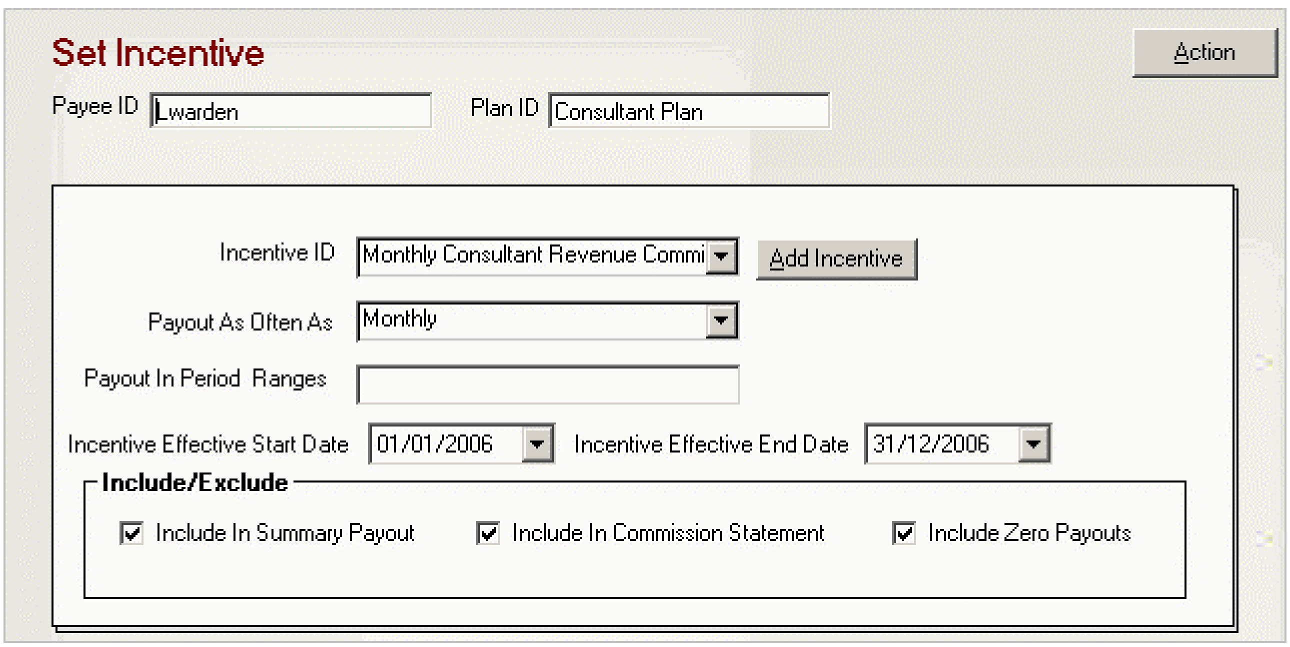


Consultant Plan (PL03)

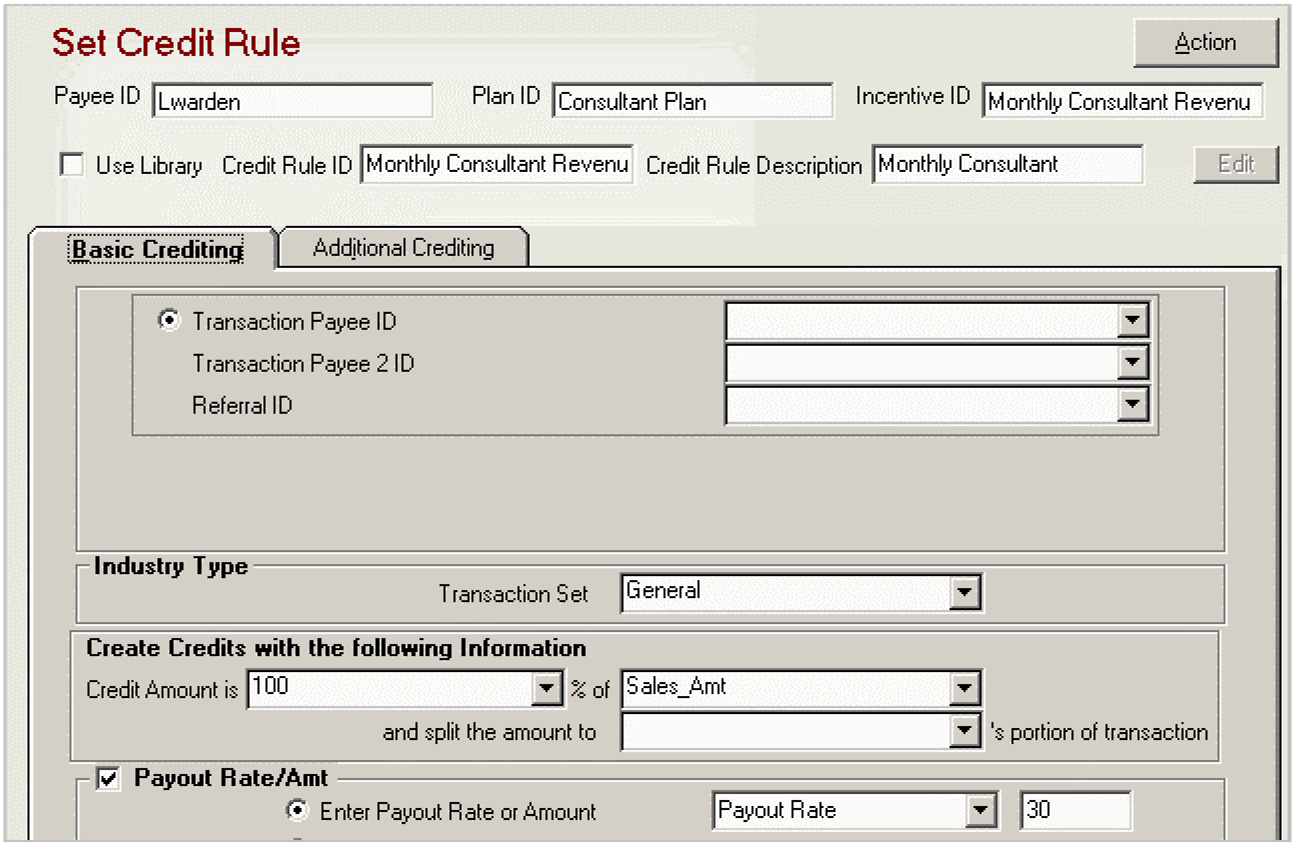
This plan is applicable to Consultants placed at customer sites. Draw is demonstrated in this plan.

Monthly Consultant Revenue Commission

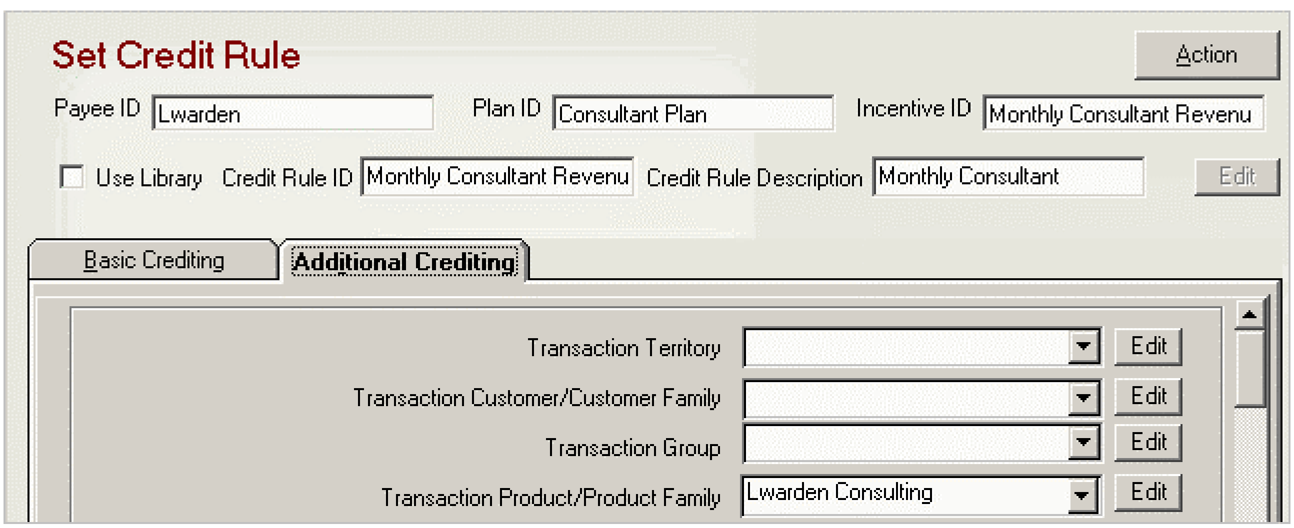
This incentive is paid each month. The incentive 'Monthly Consultant Revenue Commission' is chosen in the **Set Incentive** form. The monthly frequency is set in the Payout As Often As' field. Each month, the Account Manager will be incented with commission. In the Include/Exclude, the options 'Include In Summary Payout", "Include in Commission Statement" and "Include Zero Payouts" are checked to include the incentives in the summary payout process, commission statement report and zero payouts process.



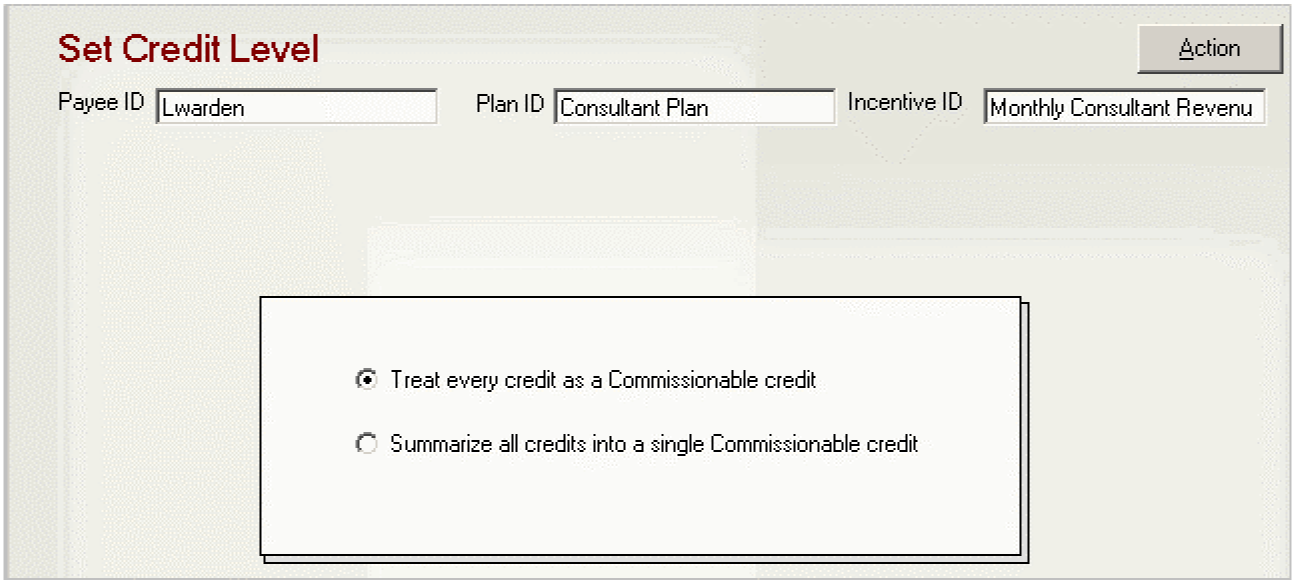
In Basic Crediting of the **Set Credit Rule** form, the transaction of the selected Payee ID will be considered for calculation process. For each qualified transaction, the credit amount will be 100% of Sales Amount and the payout rate/amount is set as $30.



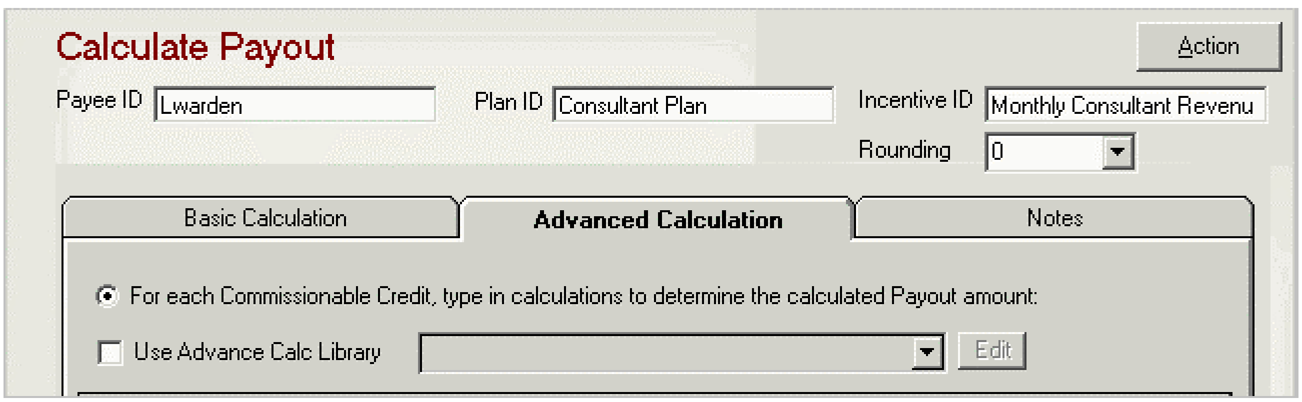
In the Additional Crediting of the **Set Credit Rule** form, the Lwarden Consulting is selected as Transaction Product/Product Family.



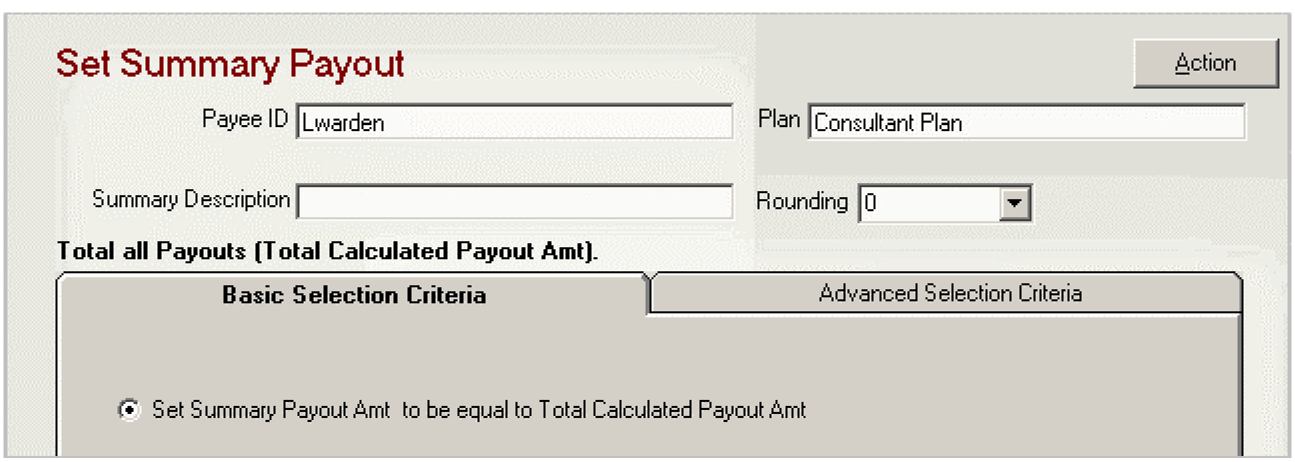
In the **Set Credit Level** form, the “Treat every credit as a Commissionable credit” radio option is selected.



In the **Calculate Payout** form, the "For each Commissionable Credit, type in calculations to determine the calculated Payout amount" radio option is selected to calculate the commission rate. The Manager is paid for each transaction that is associated to him.



This incentive uses only the cap as summary payouts. The Manager has a draw of $5,000 per month; the draw balances will be adjusted against the summarized payout amount.

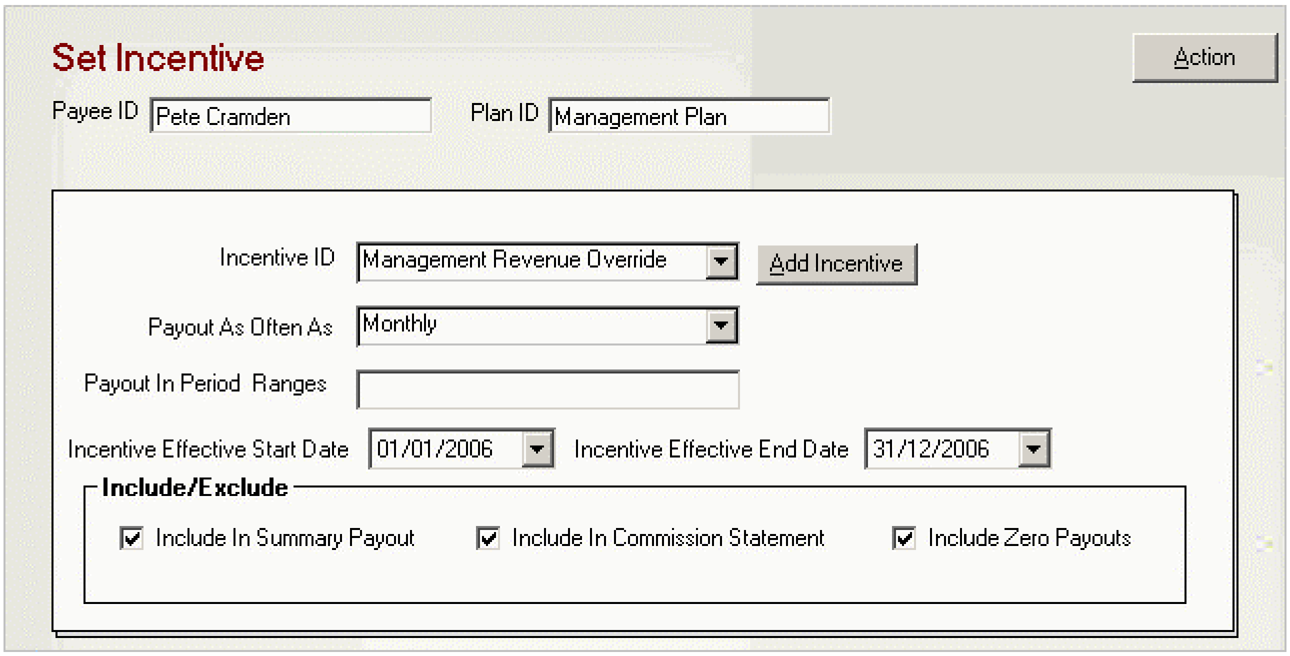


Management Plan (PL04)

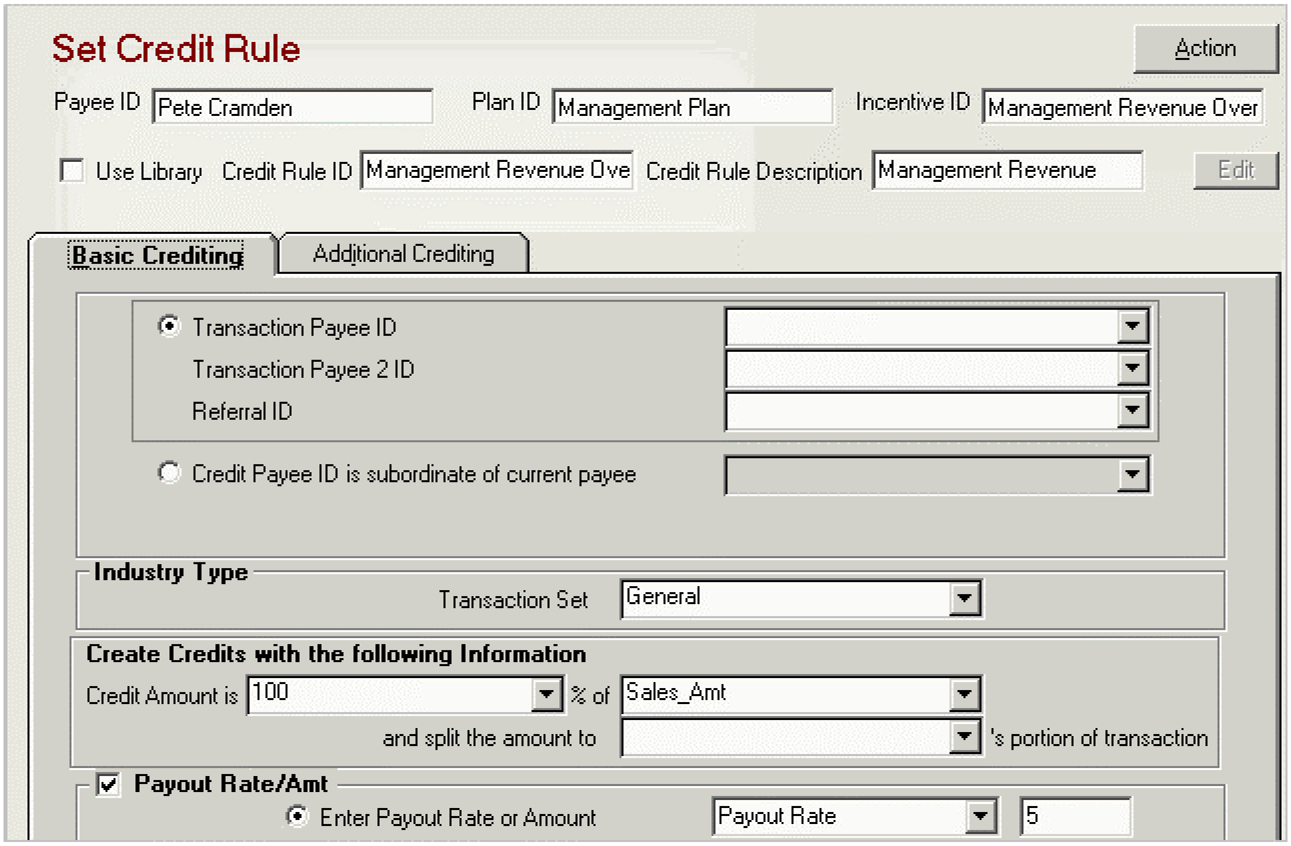
This plan is applicable to Management/Partners of the company. This plan demonstrates overrides.

Management Revenue Override

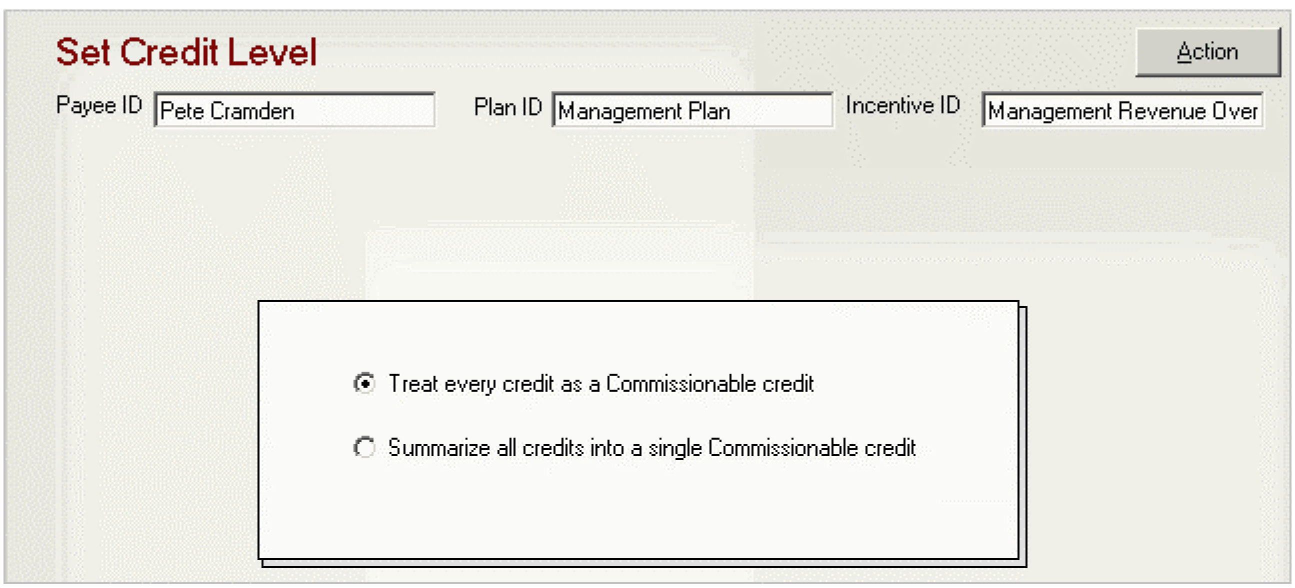
This incentive is paid each month. The incentive 'Monthly Revenue Override' is chosen in the **Set Incentive** form. The monthly frequency is set in the Payout As Often As' field. Each month, the Account Manager will be incented with commission. In the Include/Exclude, the options 'Include In Summary Payout", "Include in Commission Statement" and "Include Zero Payouts" are checked to include the incentives in the summary payout process, commission statement report and zero payouts process.



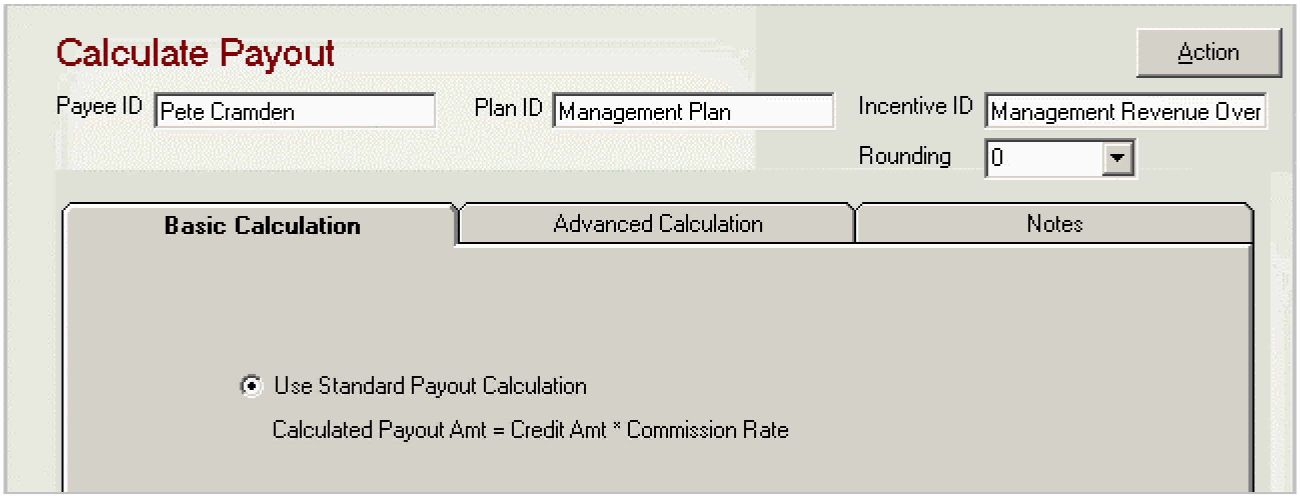
In Basic Crediting of the **Set Credit Rule** form, the transaction of the selected Payee ID will be considered for calculation process. For each qualified transaction, the credit amount will be 100% of Sales Amount and the payout rate/amount is set as $5.



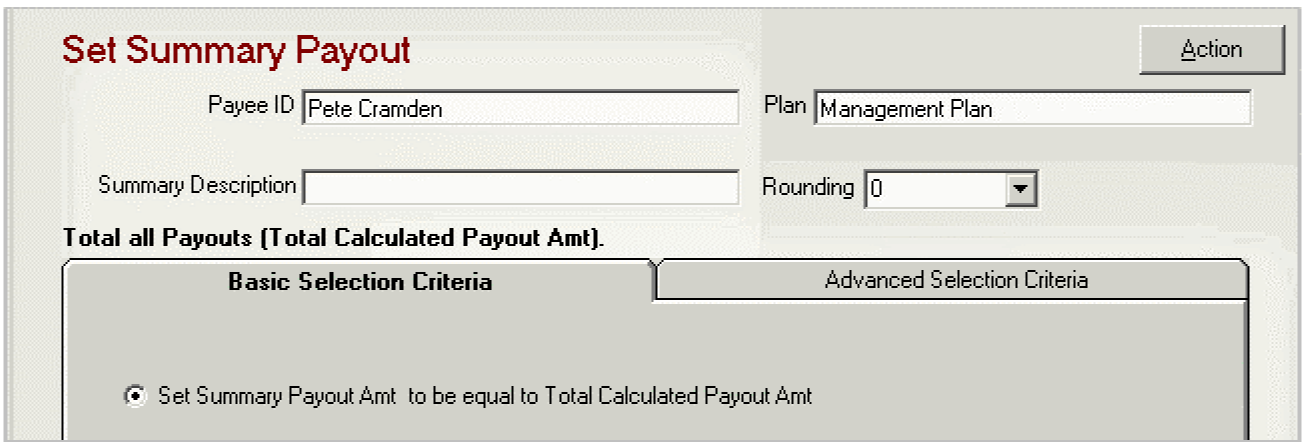
In the **Set Credit Level** form, the "Treat every credit as a Commissionable credit" radio option is selected.



In the **Calculate Payout** form, the "Use Standard Payout Calculation" radio option is selected.



In the **Set Summary Payout** form, the "Set Summary Payout Amt to be equal to Total Calculated Payout Amt" radio option is selected.



Calculate Plan

The plan wizard guides you in setting the credit rules, calculations and summarization in order to calculate the payout. The credit amount and payouts rates for payees will be calculated based on credit rules set in the plan wizard. Credit rules defines how a specific transaction can be processed, and who receives the credit. The crediting process is applied to the transaction to determine the credit amount in-order to calculate the payout of the selected payee. The plan and its rules are set prior to calculating the plan for the payees.

There are two ways to calculate the plan. You can calculate all plans for the current period by selecting "Calculate All Plans" from the Action Menu. If you want to execute the plan for a single payee, click the Plan tab and select the payee plan tab that is available at the bottom of the screen. The appropriate plan statement opens for the selected payee.