



SALES & PURCHASING INCENTIVE PLANNER

Incentive programs begin with planning. Therefore, this program planner has been designed to gather the necessary information to aid in the development process. By completing this planner with detailed information, we can assist you in structuring a successful program.

COMPANY PROFILE

Company Name: _____

Contact Name: _____

Title: _____

Your type of business: Manufacturing Distributor Wholesaler Retailer Other

What are the overall products or services you provide? _____

When was your company established? _____

INCENTIVE PROGRAM HISTORY

Has your company ever run an incentive program before? Yes No

If yes, what were the main objectives? _____

When was the program run? _____

How long did it run? _____

What type of awards were used? _____

Were teams used? _____

Did you consider the program a success? Yes No

What part of the program did you especially like? _____

Was there a part of the program that you didn't like? Yes No

If yes, what didn't you like? _____

How much was spent on the program? _____

PROGRAM OBJECTIVES

List the objectives that apply to your needs, in order of priority:

- | | |
|--------------------------------------|----------------------------------|
| _____ Increase Sales | _____ Increase Product Knowledge |
| _____ Increase Purchase Frequency | _____ Introduce a New Product |
| _____ Increase Dealer Representation | _____ Increase Market Share |
| _____ Obtain Display/Shelf Space | _____ Other _____ |

How will the goals of the program be measured? Check one: (See example below)

- _____ **Total Dollar** volume of sale or purchase objective
- _____ **Unit** increase of all sales or purchase objective
- _____ Percentage increase of purchase or sale objective
- _____ Other (please specify) _____

Example:

	<u>Product/Services</u>	<u>Current Sale or Purchase Level</u>	<u>Target Sale or Purchase Level</u>
Total Dollar	New accounts sales	\$50,000/mo.	\$55,000/mo.
Unit	Cell phone sales	200 units/mo.	240 units/mo.
Percentage Increase	Restaurant supply purchases	\$350/mo.	10% (\$385 mo.)

What products or services will be included in the incentive program? _____

PROGRAM DATA

Please list the number of participants who will be in your program.

- | | |
|-----------------------------------|--|
| _____ Your Salespeople | _____ Distributor Proprietors/Managers |
| _____ Dealer Salespeople | _____ Your Direct Customers |
| _____ Dealer Proprietors/Managers | _____ End User Customers |
| _____ Distributor Salespeople | _____ Other _____ |

ORGANIZATIONAL FLOW CHART

On a separate piece of paper, please detail the organizational flow chart of your program.

What type of locations will participate in the program? (Corporate, Regions, Districts, Branches, etc.)

Number of locations? _____

How often do you want to award the participants for goal accomplishments (aka Award Cycle)?

Weekly Monthly Quarterly End of program Other _____

What is the sales volume of the product/services? _____

What is the dollar amount or percentage of gross sales that will be allocated for the program? (\$ or %)

What is your program calendar? Start _____ Finish _____

Have you decided on a program theme? Yes No

If yes, please indicate: _____

Do you anticipate the program's administration will be managed at a: Central Level Branch Level

Regional Level Other? _____

Which of these administration methods do you prefer:

Option 1

Your program administrator will track your employee performance and will be responsible to issue point checks to the employees who qualify. (Our point checks are a sequentially numbered, three-part carbonless form that can be typed on, run through a dot matrix printer, or hand written. The employee will receive two copies of the check and the administrator will keep one for their records. Points will be billed at the time of redemption.)

Option 2

Your program administrator will track your employee performance and will be responsible to issue stamps to the employees who qualify. (Our stamps are individual stickers that are valued at one dollar each. Employees will receive a collection book to accumulate their stamps until they are ready for redemption. When we supply stamps to the program administrator we will also bill for the value of the stamps at that time.)

Is there a committee involved in reviewing this program? Yes No

If yes, please describe who the committee is made up of (positions) and the number of members.

Who will make the final decision about this program? _____

When is your next scheduled planning meeting? _____