



Sales and 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 there teams used? _____

Did you consider the program a success? _____

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 top one or two objectives in order of priority:

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

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

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

Example:

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

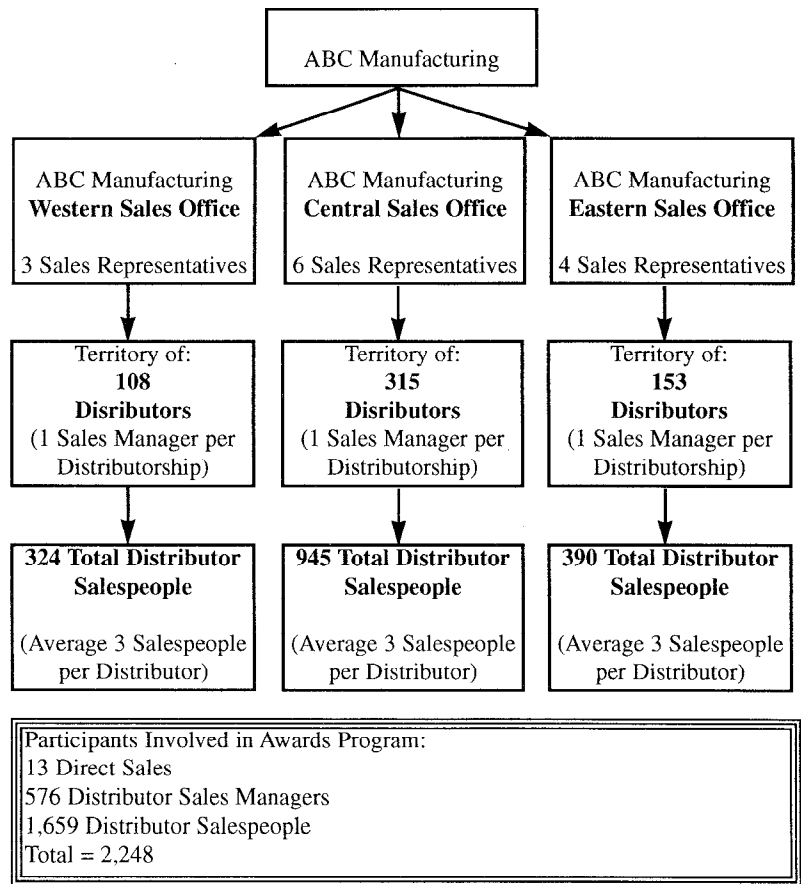
What products or services will be included in this incentive program? _____

PROGRAM DATA

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

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

On a separate sheet, please detail the organizational flow chart of your program. The following is an example of ABC Manufacturing Distributor Salesforce incentive, with the inclusion of Distributor Managers and ABC's direct salesforce.



What type 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 products/services? _____

What is the total 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: _____