



# 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>
<b>Total Dollar</b>	New accounts sales	\$50,000/mo.	\$55,000/mo.
<b>Unit</b>	Cell phones sales	200 units/mo.	240 units/mo.
<b>Percentage Increase</b>	Restaurant supply purchases	\$350/mo.	10% (\$385 mo.)

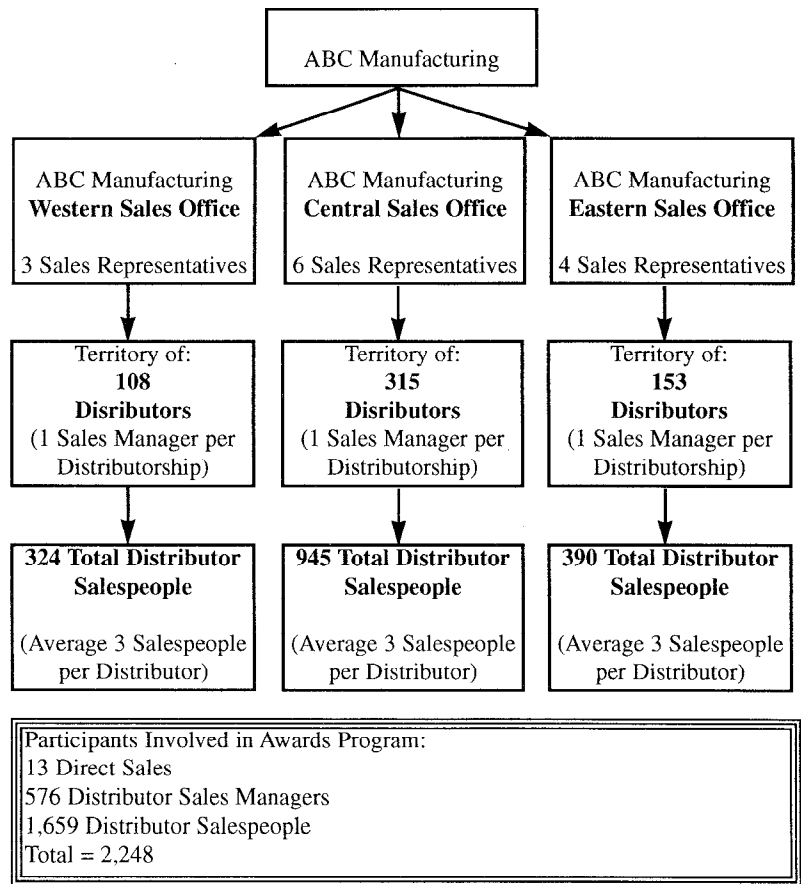
What products or services will be included in this incentive program? \_\_\_\_\_

**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: \_\_\_\_\_