



Measuring Incentive Plan ROI: The IterNovatio Approach

Leveraging Spiff & the Salesforce Ecosystem for Scalable Financial Tracking

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The Goal & Significance



Implement Scalable Solutions

Track financial ROI of employee incentive plans managed in Spiff.



Substantial Investment

Incentives represent a major portion of Total Rewards.



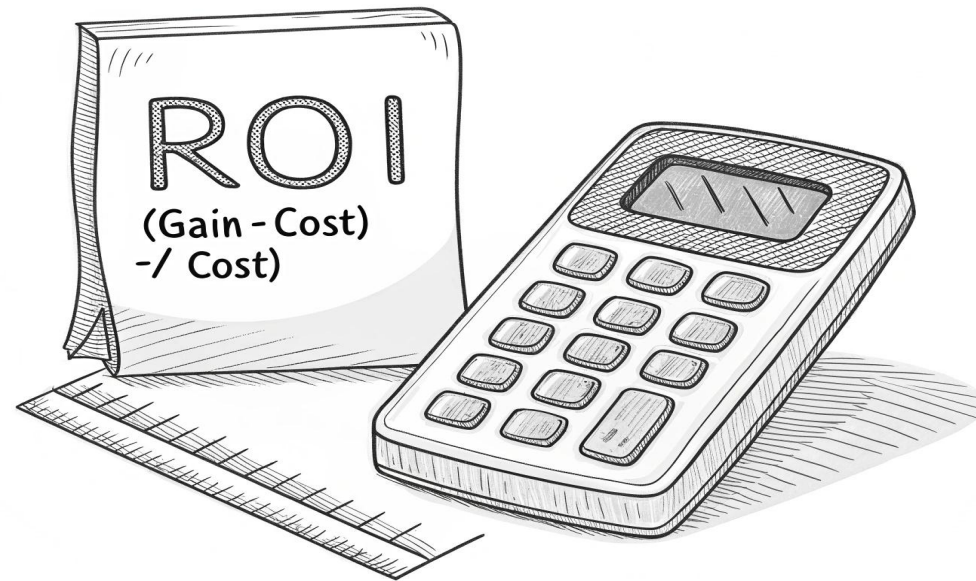
Critical Analysis

Optimize spend, drive behaviors, achieve business results.

*Sales incentive compensation represents a substantial expenditure, often constituting a significant portion of the sales budget. In the US alone, businesses spend over **\$127 billion** annually on sales incentives, with total spending estimated at **\$176 billion**. Measuring ROI is essential to **justify these costs** and demonstrate that incentive plans are not just expenses but **strategic levers** that deliver tangible value.*



Understanding Incentive ROI



ROI Formula

Calculate ROI as (Gain - Cost) divided by Cost

Gain Components

- Incremental Revenue & Profit
- Cost Savings
- Strategic Benefits

Cost Components

- Plan Design & Communication
- Administration & Technology
- Incentive Payouts

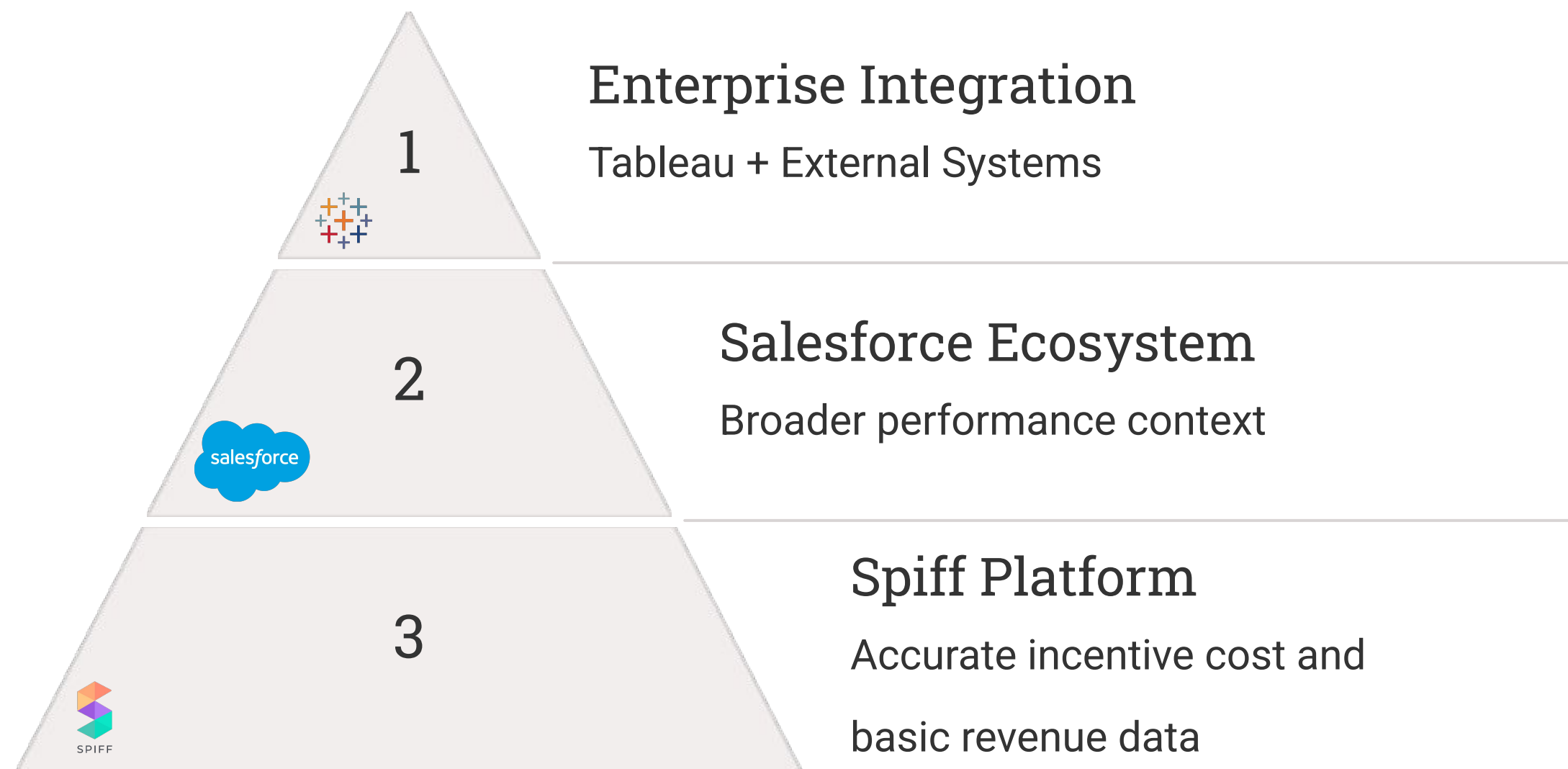
The key challenge: Attribution – isolating the impact of incentive plans from other market factors.

Simply observing performance during an incentive period is insufficient. Accurately attributing impact requires more sophisticated techniques like control groups (comparing performance to a similar group without the incentive), analyzing historical trend lines, using statistical modeling, or focusing on measuring only the incremental lift above a defined baseline.



Our Solution Framework

A progressive approach leveraging increasingly sophisticated data unification and analysis tools.



We offer a flexible, three-tiered approach to measuring incentive ROI, designed to match your specific analytical needs and budget.





Approach 1: ROI Insights

Incentive costs vs. performance metrics within Spiff.

Cost Tracking

Incentive
calculations &
payouts

Basic Visibility

Incentive costs vs
Performance metrics



Performance

Data

Metrics streams into
Spiff

Spiff Reporting

Native dashboards &
analysis



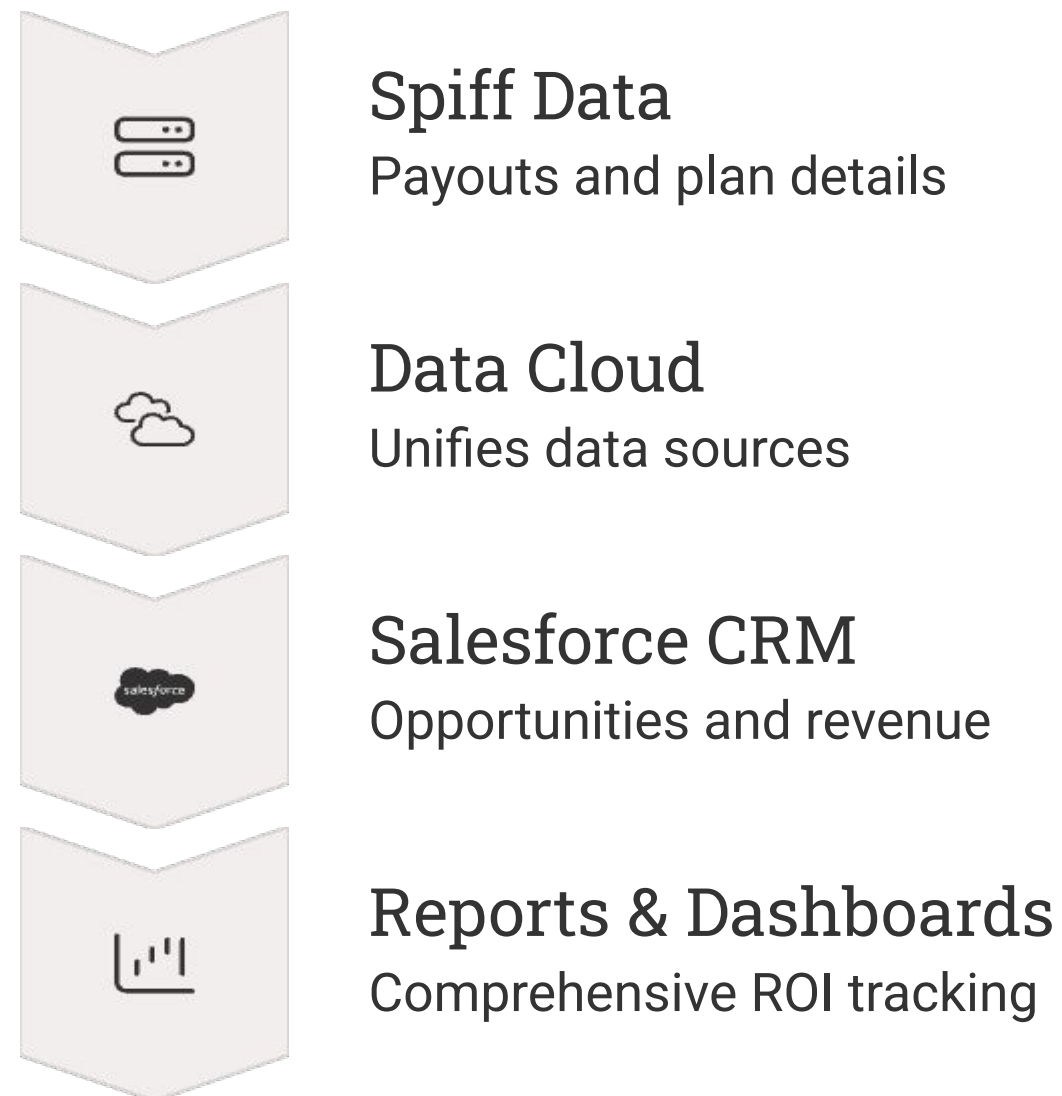
A Spiff-centric approach providing basic ROI tracking directly within the platform.

Compares incentive costs vs. performance metrics within Spiff.



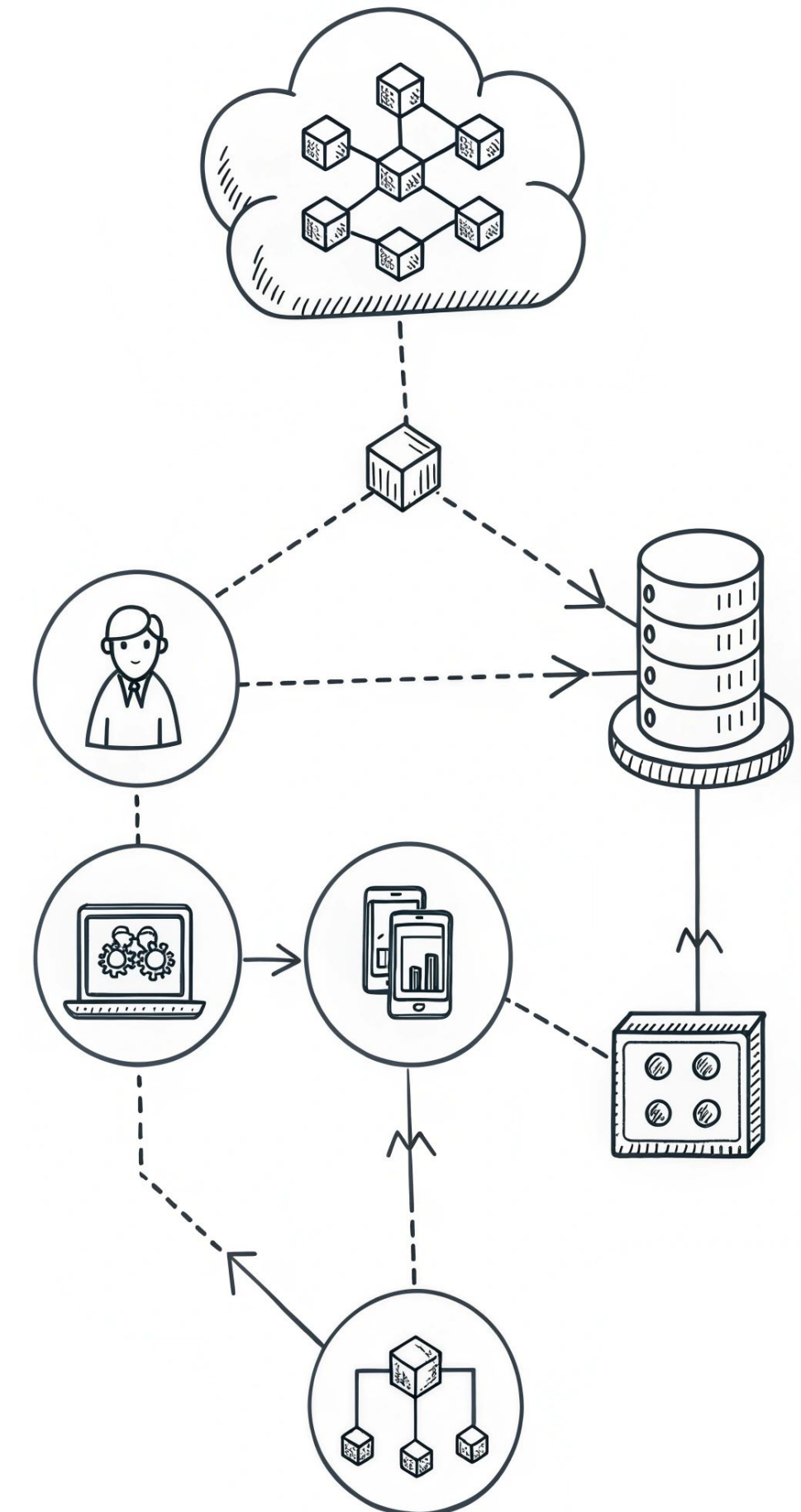
Approach 2: ROI Analytics

Unify Spiff incentive costs with core Salesforce CRM data using Salesforce Data Cloud.



More comprehensive ROI reporting within the familiar Salesforce environment.

Track ROI by Rep, Deal, or Plan using a unified view.





Approach 3: Enterprise Strategic Value Analysis

Holistic, enterprise-wide ROI analysis incorporating diverse data sources for the deepest strategic insights.



Data Integration

Spiff, Salesforce, ERP, HRIS



Comprehensive Unification

Data Cloud harmonization



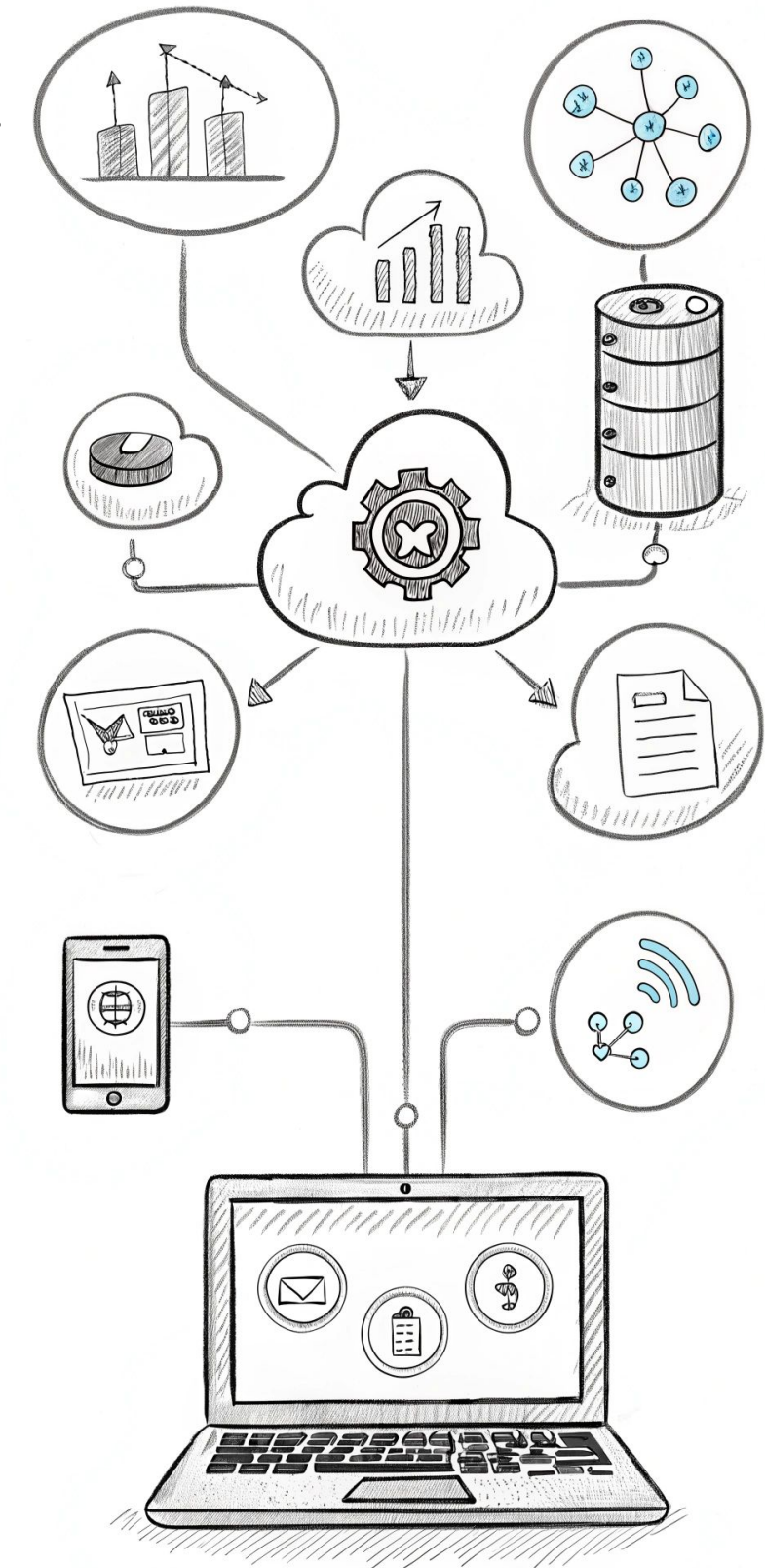
Advanced Visualization

Tableau analytics platform

Most accurate & detailed ROI picture

Enables strategic optimization, correlation analysis, scenario modeling.

Sophisticated, interactive visualizations tailored for diverse stakeholders.





Comparing Approaches

	Approach 1: Spiff-Centric	Approach 2: Salesforce Focus	Approach 3: Enterprise Value
<i>Scope</i>	Basic	Comprehensive (Sales)	Holistic (Enterprise)
<i>Key Systems</i>	Spiff	Spiff, SF CRM, Data Cloud	Spiff, SF, Data Cloud, ERP/HRIS, Tableau
<i>Analysis Platform</i>	Spiff Reports	Salesforce Dashboards	Tableau
<i>ROI Detail</i>	Preliminary	Revenue-Based	Profit-Based, Strategic

Choose the approach that aligns technical architecture with required business value and analytical depth.



Estimated Investment



Approach 1: ROI Insights

Estimated Cost: Approximately **\$5'000**

Focuses on existing Spiff setup with configuration and basic reporting



Approach 2: ROI Analytics

Estimated Cost: **\$10'000 to \$15'000**

Includes Data Cloud setup, Spiff integration, and Salesforce report development



Approach 3: Enterprise Strategic Value

Estimated Cost: **Let's talk!**

Variable cost depending on scope, integrations, and Tableau development

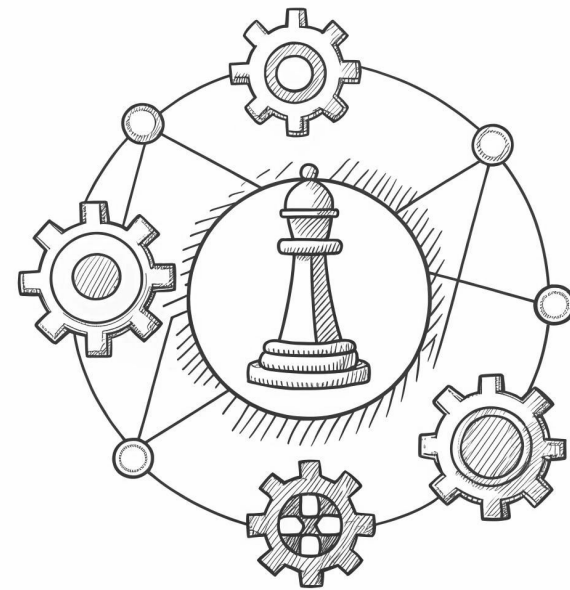


Key Takeaways

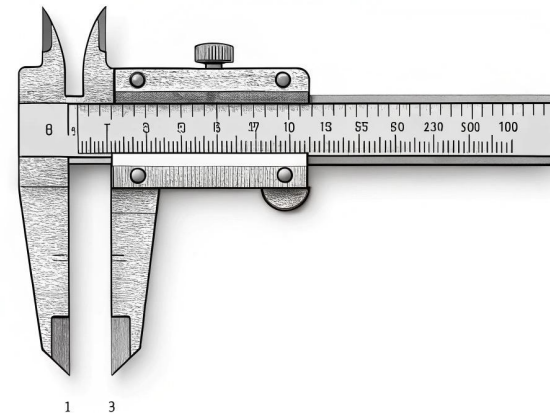
Our analyses progress from basic to strategic, leveraging Salesforce Data Cloud for unified data, Spiff for cost accuracy, and Tableau for advanced insights—all underscored by the importance of high-quality data.



Progression: From basic to strategic ROI analysis



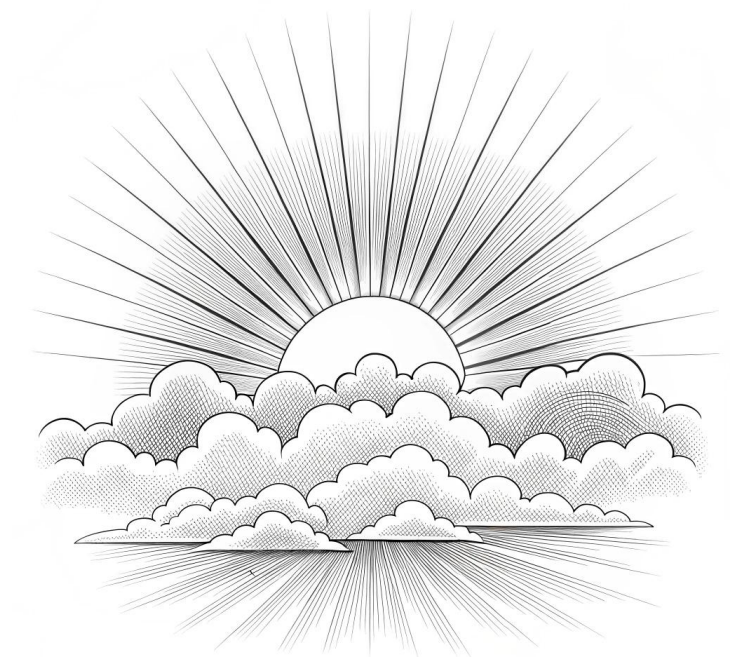
Central Hub: Salesforce Data Cloud unifies data



Accurate Costs: Spiff provides reliable investment data



Data is Crucial: Data quality drives ROI reliability



Advanced Insights: Tableau unlocks deep analysis



Next Steps & Call to Action

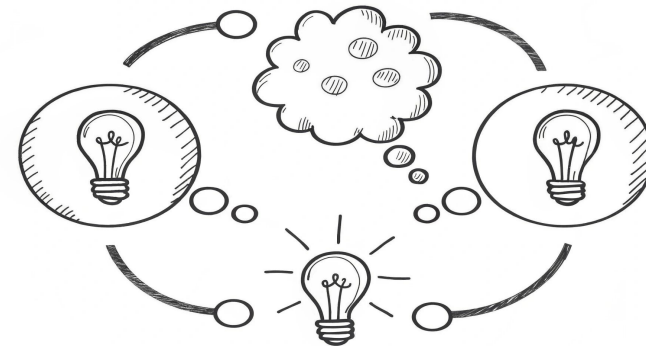
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Discuss

Identify the approach that fits your current and future goals.

IterNovatio can facilitate this discussion, helping you evaluate the pros and cons of each approach based on your specific business context, technical maturity, and budget.



Define

Clarify key ROI questions and required metrics.

We can lead workshops to help you articulate key business questions, identify the necessary data points (Gain and Cost components), and define measurable KPIs for your incentive plans.



Explore

Schedule a follow-up to review the desired approach in depth.

IterNovatio can prepare tailored deep-dive sessions, outlining the technical architecture, data integration steps, potential challenges, and resource requirements.



Partner

Engage with IterNovatio to implement your chosen solution.

IterNovatio offers end-to-end services, from detailed requirements gathering and solution design to implementation, testing, and ongoing support for your chosen ROI measurement framework.