



Callidus On Premise Course Offerings Guide

Professional Development Services



Callidus Software[®] offers a comprehensive set of performance-oriented, role-based training courses that enable students to become proficient in the implementation, administration and use of Callidus Software Sales Performance Management (SPM) and Pervasive Performance Management (PPM) solutions. The Callidus Software SPM solution is utilized most effectively when project members have both formal and informal training before, during and after the implementation process, ensuring they possess the required skills and knowledge to use the software effectively.

The Callidus Software Professional Development team has designed each course to meet specific skill and performance objectives. Based on training and implementation experience, our instructors guide students through relevant examples, hands-on exercises and best practices. The training is focused on providing students with the abilities and understanding to take advantage of the powerful capabilities of Callidus Software solutions.

Course Delivery Methods

Callidus Software recognizes and understands the varying needs of different Callidus SPM users. As a result, the Professional Development Services team offers a variety of training delivery methods and approaches to meet the unique needs of every customer.

eLearning Training provides opportunities to learn anywhere and anytime. These courses are designed to help students gain knowledge through web based instruction, accessible with a simple Internet connection and browser. This learning format is available for select courses.

Virtual Instructor Led Classes are offered with a Callidus instructor teaching remotely. The training is fully interactive with sound, visuals, chat, and product demonstrations. In addition, students will have full access to their own Callidus training environment to complete hands-on labs and exercises in a live application. All this can be done without leaving your desk.

Onsite Instructor-Led Classes are offered at the customer location for groups that include a minimum of five students for a single class. Onsite classes offer a more intimate setting where students can interact as a team with the instructor, and focus on topics that are relevant to your specific environment. These offerings may be our standard courses, or may be customized for an additional fee. All required course materials are supplied. These classes are offered by request.

Custom Training is available for those who are interested in specific topics, or want to use customer-specific data as part of the training curriculum. This training may include Call Center Training, Plan Update Training, Process Training, or other training that might be needed by your organization. These classes are offered by request.

See our course schedule at: <http://www.callidussoftware.com/education/courses/schedule/>

Training Format

All Callidus training courses are taught with the understanding that all students learn differently. Courseware is provided with each course, and all basic and advanced courses are divided into easy to follow modules and topics. Within each topic, the following are covered:

Concept: The instructor will provide a conceptual explanation and description of the feature, functionality or capability being discussed.

Demonstration: The instructor will visually demonstrate the feature, functionality, or capability being discussed within the application being taught. In many cases, the instructor will also provide additional insight or tips about the specific functionality.

Exercise: After a topic has been covered with explanation and demonstration, students are given the opportunity to do hands-on labs within the application being taught. Each student will have their own training environment to work. In most classes, the labs build upon previous exercises to provide a complete start-to-finish understanding of the application.

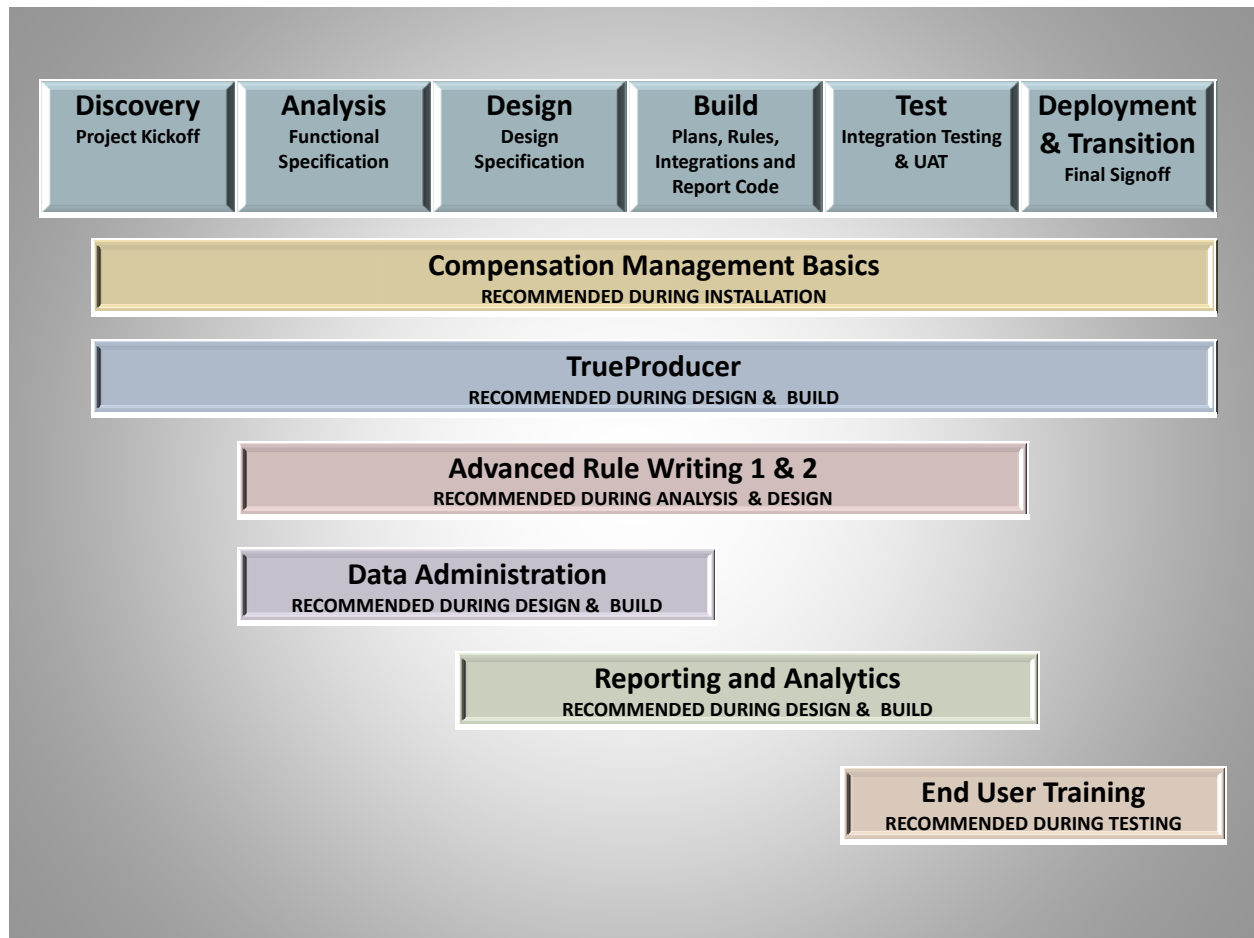
Suggested Training Plan by Role Training Roadmap

Course Name	Compensation Administrator/ Business Analyst	Integration Specialist/ Systems Administrator	Report Designer/ Report Administrator	Project Manager/ Testers/QA	End Users
Compensation Management					
Compensation Management Basics	■	■	■	■	
Advanced Rule Writing 1	■			□	
Advanced Rule Writing 2	■			□	
Data Administration					
Data Administration	□	■	□		
Reporting and Analytics					
End User Reporting	□		□		■
Callidus Report and Analytics	□	□	■		
TrueProducer					
TrueProducer Basics	■	■			

■ Recommended (review course descriptions for prerequisites)
 □ Suggested

Training within the Callidus Implementation Project Lifecycle

As you progress through the stages of your project implementation, there are recommended courses that will help with the transfer of knowledge and understanding within the 6.x[®] applications. The table below provides a general timeline and course recommendations throughout the project lifecycle. All classes are also recommended when you have new users after implementation, and when deployment has completed.



Compensation Management

Compensation Management Basics

Audience This course is designed to enhance the user's knowledge of Compensation Management, its features, functionality and capabilities. This course is intended for the entire compensation team, including compensation managers, administrators, analysts and IT professionals.

Duration

Delivery Method	Course Length
Onsite	2 days
Virtual Live Web	4 half day sessions

Description This course covers a wide range of topics focused on providing basic understanding of the many features, functionality, and capabilities of the Compensation Management application.

Objective Upon completion, students will have an understanding of the following:

- Navigation, administration, and search functionality within the Compensation Management Interface
- Organizational data and how it is used to manage payee information
- How to categorize information to define and sort transactional data
- The flexibility and capabilities of business rules to build effective compensation plans
- Result-generation features including tracing results and managing adjustments

Prerequisites

- Familiarity with compensation terminology – RECOMMENDED
- Familiarity with Microsoft Windows – RECOMMENDED

TrueComp Delta

TrueComp Delta Training *

Audience This course is intended for all TrueComp® users, both business and IT professionals, with current knowledge of TrueComp and are upgrading to TrueComp 6.x. This program meets the requirements of the Callidus Certification Program for 6.x in lieu of the Compensation Management Basics course.

Duration

Delivery Method	Course Length
eLearning	1 hour

Description This Delta Training is designed to provide students with the knowledge of the changes to the TrueComp 6.x product.

Objective Upon completion, students will have an understanding of the following:

- New interface navigation
- New product enhancements and features related to the 6.x environment

Prerequisites

- Experience with prior version of TrueComp – *REQUIRED*

* NOTE: This class is scheduled by request only.

Rule Writing 1 – Advanced Course

Audience This course is intended for compensation professionals responsible for developing, modifying and designing Compensation Plans.

Duration

Delivery Method	Course Length
Onsite	2 days
Virtual Instructor Led	4 half day sessions

Description This course will teach strategies to develop and execute compensation plan designs within Compensation Management®. Using real-life scenarios, students will also run calculations, evaluate results, and identify other useful tools for rule and plan development.

Objective Upon completion, students will have an understanding of the following:

- How to develop, modify and design rules and compensation plans using the Compensation Management application
- Development and execution strategies of compensation plan analysis, process flow, required components, rule design and expected results
- Best approaches to designing compensation rules and plans in Compensation Management
- Compensation Calculation processes and result validation

Prerequisites

- Compensation Management Basics – REQUIRED
- Familiarity with compensation terminology – RECOMMENDED

Rule Writing 2 – Advanced Course

Audience This advanced workshop is designed for administrators, plan designers and compensation specialists who will be managing plan development and rule writing within Compensation Management®.

Duration

Delivery Method	Course Length
Onsite	2 days
Virtual Instructor Led	4 half day sessions

Description This course will introduce students to advanced concepts that will assist in developing strategies for interpreting compensation plans, solving compensation-related issues, and structuring rules to be most effective. Students will work with real-life scenarios to improve skills needed to manage various compensation policies and rules.

Objective Upon completion, students will have an understanding of the following:

- Data, formula, and specific conditions that affect rule logic automation
- Efficient and effective ways to design compensation plans
- Benefits and challenges of aggregating data
- How time impacts rules, rates and results within Compensation Management

Prerequisites

- Compensation Management Basics – *REQUIRED*
- Rule Writing 1 – *REQUIRED*
- Implementation experience - *RECOMMENDED*

Data Administration

Data Administration

Audience This course is intended for Information Technology professionals, Database Administrators, advanced Compensation Administrators, and other individuals who are involved in the deployment or ongoing implementation of a Callidus Enterprise environment.

Duration

Delivery Method	Course Length
Onsite	2.5 days
Virtual Instructor Led	5 half-day sessions

Description In this course, students will learn the process of implementing a Callidus Compensation Management environment, from the initial deployment through the generation of results for reporting and analytics.

Objective Upon completion, students will have an understanding of the following:

- Describe the architecture of a Callidus Enterprise environment
- Deploy and configure a Callidus installation
- Configure the Compensation Management
- Manage user security
- Manage the transfer of implementation and plan data
- Understand the Calculation process
- Describe the architecture of the Callidus data stores
- Deploy, Configure, and populate the Datamart

Prerequisites

- Compensation Management Training – REQUIRED
- Familiarity with relational database concepts and database tools - RECOMMENDED
- Familiarity with systems implementation methodology – RECOMMENDED

Reporting and Analytics

End User Reporting

Audience This course is intended for anyone who will interact with reports within the organization. This could include: Compensation Plan Participants and Managers, Report Administrators, Report Developers, Business Analysts and Compensation Analysts.

Duration

Delivery Method	Course Length
eLearning	30 minutes

Description This course is designed to further enhance the user's knowledge of Monaco End-User report functionality and features.

Objective Upon completion, students will have an understanding of the following:

- Monaco terminology and navigation
- Reports available by role
- Managing report security
- Setting report preferences and options

Prerequisites

- Familiarity with compensation terminology
- Familiarity with Microsoft Windows

Callidus Reporting and Analytics

Audience This course is intended for Managers, Compensation Administrators, Report Designers, and other individuals who will be creating or managing Callidus results data in the form of reports and analytics.

Duration

Delivery Method	Course Length
Onsite	2 days
Virtual Instructor Led	4 half-day sessions

Description In this course, students will become familiar with various methods of working with Callidus results data, including dynamic analytics, static reports, and desktop visualizations.

Objective Upon completion, students will have an understanding of the following:

- Be familiar with the process of customizing and developing reports in 6.x that are created with Crystal Reports
- Have an understanding of the Reporting Architecture and development tools

Prerequisites

- Compensation Management Basics – *REQUIRED*
- Familiarity with SQL – *STRONGLY RECOMMENDED*
- Familiarity with Crystal Reports – *STRONGLY RECOMMENDED*

TrueProducer

Audience This course is intended for those responsible for producer administration in the insurance industry.

Duration

Delivery Method	Course Length
Onsite	1.5 days
Virtual Live Web	3 half-day sessions

Description This course will introduce students to TrueProducer – its architecture, environment, and functionality. Students will learn the fundamentals of TrueProducer administration and security, navigation and searches. In addition, students will learn various tasks related to producer, category hierarchy, contract, and credential management.

Objective Upon completion, students will have an understanding of the following:

- Identify the components of the TrueProducer architecture
- Perform quick and advanced searches
- Configure an approval workflow
- Create and approve producer records
- Create and navigate through a category hierarchy
- Create and administer contracts
- Create and view producer credentials
- Customize the look and feel of the TrueProducer interface

Prerequisites

- Familiarity with insurance compensation terminology – *STRONGLY RECOMMENDED*

Non-Product Training

Principles of Sales Compensation

Audience This course is intended for compensation professionals and business analysts responsible for developing, modifying and designing Compensation Plans for an organization.

Duration

Delivery Method	Course Length
eLearning	1 hour

Description This course introduces students to the basic principles of sales compensation. Emphasis is placed on terminology and concepts used throughout the compensation process within organizations. The course reviews compensation design techniques and how they may be incorporated into sales planning. Students will review typical sales cycles and work to gain a better understanding of the influences that impact the sales compensation process.

Objective Upon completion, students will have an understanding of the following:

- Different corporate reward options and the impact they have on sales organizations
- Various selling strategies that drive compensation
- The components of a sales force lifecycle and influences they have on compensation
- The key components of compensation plan design

Prerequisites

- No course prerequisites
- Internet Explorer 5.5 (SP2) or newer – *REQUIRED*
- High-speed Internet connection – *RECOMMENDED*
- Sound card – *RECOMMENDED*