



# Callidus OnDemand Course Offerings Guide

Professional Development Services



Callidus Software<sup>®</sup> 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.

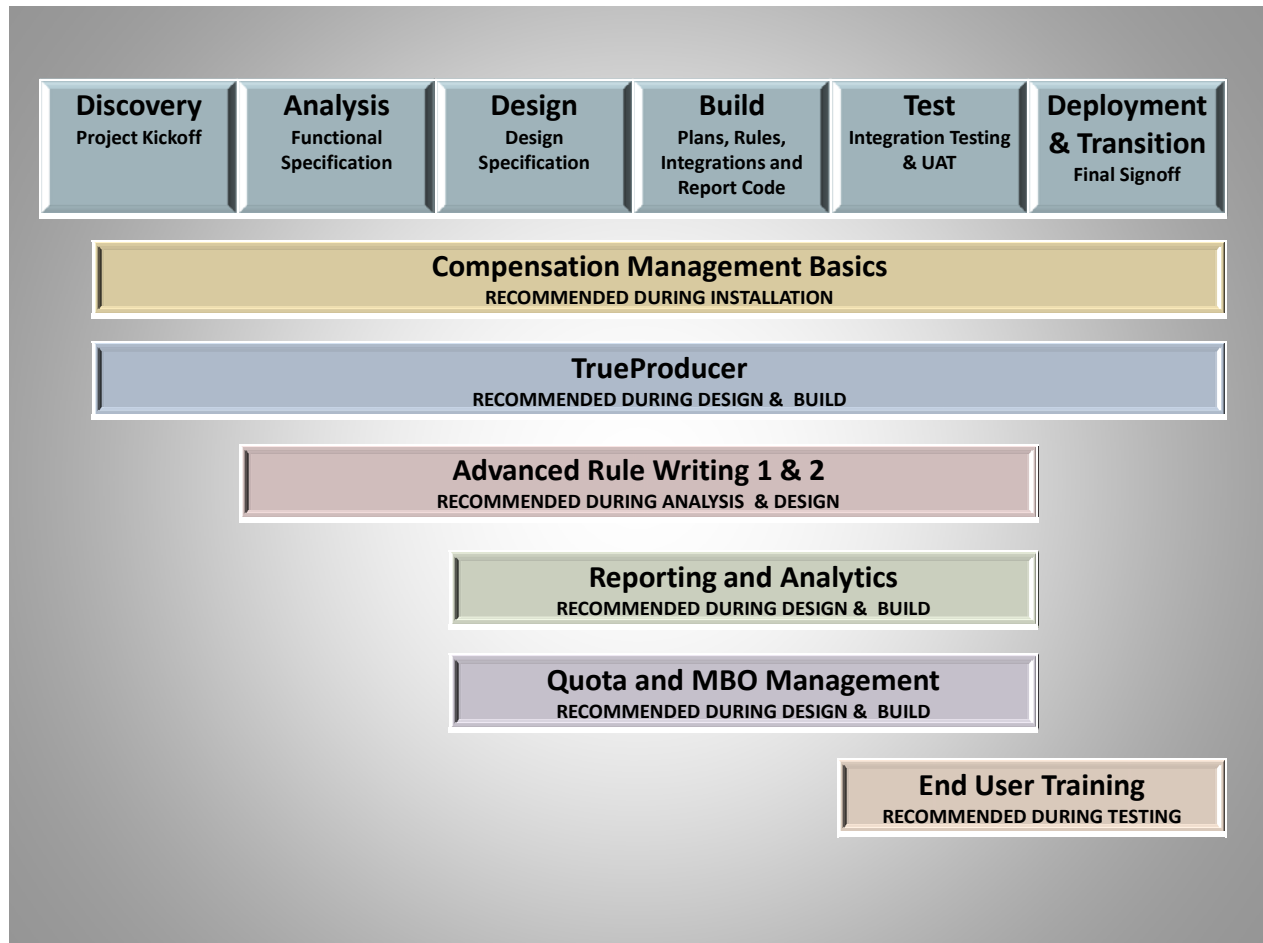
## Suggested Training Plan by Role Training Roadmap

Course Name	Compensation Administrator/ Business Analyst	Integration Specialist/ Systems Administrator	Report Designer/ Report Administrator	Project Manager/ Testers/QA	End Users
<b>Compensation Management</b>					
Compensation Management Basics	■	■	■	■	
Advanced Rule Writing 1	■			□	
Advanced Rule Writing 2	■				
<b>Reporting and Analytics</b>					
Callidus Reporting and Analytics			■		
End User Reporting Training					■
<b>Quota Management</b>					
Using TrueQuota	■				
<b>Objective Management</b>					
Objective Management Administrator	■				
Objective Management End User					■

■ 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 Monaco<sup>®</sup> 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 Instructor Led	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

## 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 pipelines, 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*

# 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:

- Describe the architecture of the Callidus reporting and analytics environment
- Understand the Business Objects Universe
- Create dynamic analytic reports with Web Intelligence
- Create and publish static reports to display Callidus results data
- Create an interactive dashboard

**Prerequisites**

- Compensation Management Basics – *REQUIRED*
- Familiarity with Business Objects – *RECOMMENDED*
- *Familiarity with Crystal Reports - RECOMMENDED*

# Objective Management

## Objective Management Administration

**Audience** This course is intended for Objective Management administrators and managers that will be responsible for creating, distributing, managing and editing managed by objective programs in the organization. The person in the role would be creating the objectives and program elements, distributing the programs to participants, in some cases approving the programs and managing the program workflow.

### Duration

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

**Description** The Objective Management Administration course covers the complete workflow associated with creating and maintaining MBO programs. The course will cover a range of topics, including, navigation within the interface, setting up organizational data, creating MBO program elements, creating MBO programs, program distribution to managers and participants, program approvals and scoring and distribution of scores to program participants.

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

- Be familiar with navigation of the Objective Management interface
- Create organizational data such as participants, positions and titles
- Create program elements that are used in MBO programs
- Develop and distribute an MBO program to program participants
- Manage the scoring process and payouts

### Prerequisites

- Compensation Management Basics – *REQUIRED*
- Familiarity with MBO programs – *RECOMMENDED*

# Objective Management End User

**Audience** This course is intended for MBO plan recipients who are assigned to managed by objective programs and required to understand navigation of the User Interface.

**Duration**

Delivery Method	Course Length
eLearning	1 hour

**Description** This course is designed to introduce the processes of MBO program from an approver, manager and participant perspective.

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

- Learn to navigate within the application and utilize the key functional areas
- Understand and be able to implement the 3 key workflow processes
- Be able to create objectives
- Be able to approve objectives
- Be able to score objectives

**Prerequisites**

- Familiarity with MBO terminology – *RECOMMENDED*

# Quota Management

## Using TrueQuota

**Audience** This course is intended for Administrators, who need to be able to create objective programs based on quota values, for Managers, who need to assign these quota objective programs to their teams and to Payees, who need to be able to review and accept quota objective programs.

### Duration

Delivery Method	Course Length
Onsite	1 day
Virtual Instructor Led	2 half-day sessions

**Description** This course is designed to introduce the administrative process for Managers and Payees who use Callidus Quota Management™. Both Managers and Payees will become proficient on how to implement the components needed to create a quota program, including defining objectives, creating a program template, distributing a program, and publishing team objectives.

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

- Identify the steps in the Quota Management Workflow
- Create a Program Template using Compensation Management
- Distribute a Program to a team
- Adjust and assign quotas to team members
- Review and accept quotas
- Run standard Quota Management reports

### Prerequisites

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