



2012 COURSE OFFERINGS GUIDE

Callidus Education Services

Table of Contents

- Callidus Software Training Course Offerings 3
- Training Format..... 4
- Compensation Management 5
 - Compensation Management Basics..... 5
 - Rule Writing 1 – Advanced Course..... 6
 - Rule Writing 2 – Advanced Course..... 7
 - Incentive Management Delta 8
 - TrueComp 6.x Delta Training 9
- Reporting and Analytics 10
 - Callidus Reporting and Analytics..... 10
 - Creating Web Intelligence Reports 11
 - End User Reporting 12
- Objective Management 13
- Quota Management..... 14
- Communicator 15
 - Using the Communicator 15
- Data Administration..... 16
- Channel Management..... 17
 - TrueProducer 17
- Non-Product Training..... 18
 - Principles of Sales Compensation 18

Callidus Software Training Course Offerings

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 Education Services 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 Education 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, 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.

Software Versions

Callidus Software offers two types of implementations, On Demand and Enterprise. Enterprise implementations involve you, the customer, handling your own hardware equipment and data. In an On Demand, or SaaS, implementation Callidus handles your data and there is no hardware to purchase. You will notice throughout the Course Offerings Guide references to courses and the software versions they pertain to. There are slight differences in the software versions and instructors do their best to point these out during class. Please make sure you are looking at the correct course for the software version your company is implementing.

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:

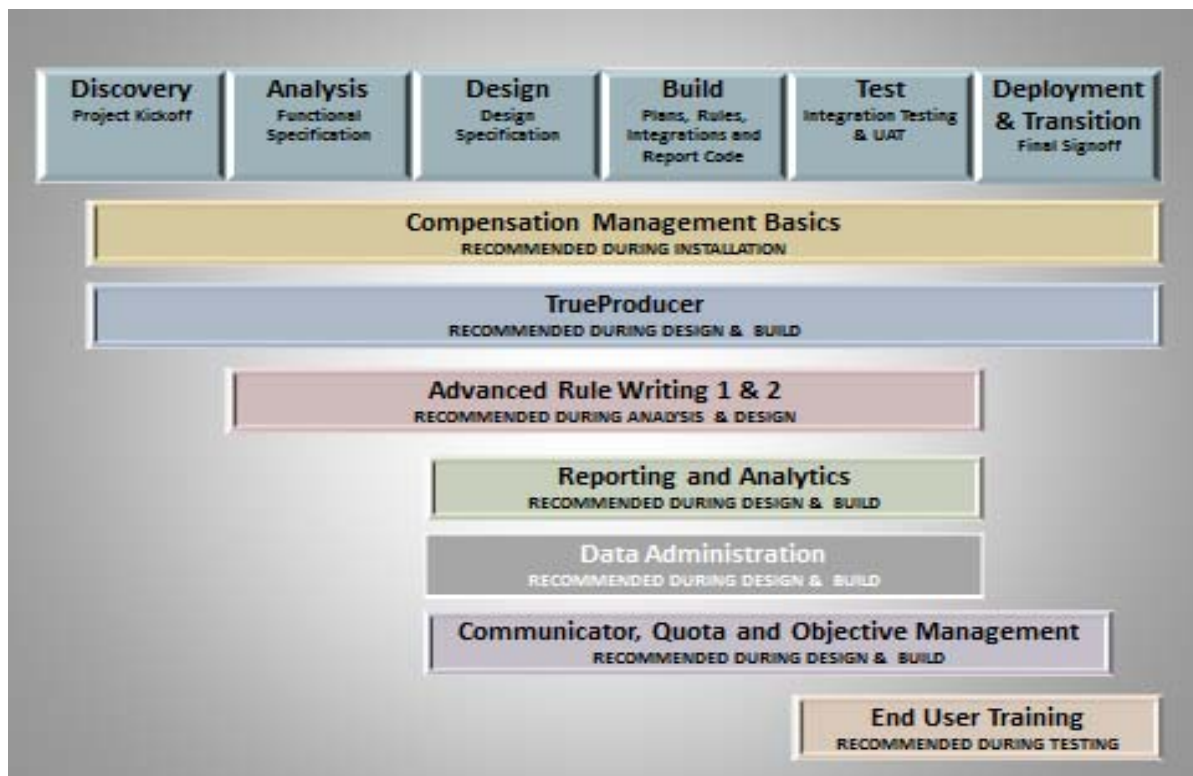
Concept: The instructor will provide a conceptual explanation and description of the feature, functionality or capability being discussed.

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. In most classes, the labs build upon previous exercises to provide a complete start-to-finish understanding of the application.

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® 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 For On Demand and Enterprise Editions

Audience

This course is intended for individuals who make up part of a 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 is a high-end overview of Incentive Management, designed to introduce students to the software's user-interface, its various components and the functions and features which serve as the foundation to all compensation plans.

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
For On Demand and Enterprise Editions**

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

For On Demand and Enterprise Editions

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*

Incentive Management Delta For On Demand Edition

Audience This self-paced course is intended for Compensation Administrators who are upgrading from TrueComp Manager to Incentive Management for On Demand.

Duration

Delivery Method	Course Length
Self-paced training	1 Hour

Description This course is designed to introduce students to the new Incentive Management user interface and the new features available in this application.

Objective Upon completion, students will be able to:

- Navigate the Incentive Management interface
- Set user preferences
- Create a Compensation Plan using Plan Components
- Run a Calculation for multiple periods
- Run a Calculation that populates data for reports
- Customize Workspaces
- Set user permissions for Quota and Objective Programs and Communications

Prerequisites

- Experience with prior version of On Demand – *REQUIRED*

TrueComp 6.x Delta Training

For Enterprise Edition

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
Self-paced training	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*

Reporting and Analytics

Callidus Reporting and Analytics For On Demand and Enterprise Editions

Audience This course is intended for Managers, Compensation Administrators, Report Designers, or individuals who will be creating or managing Callidus results data and reports-

Duration

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

Description In this course, students will become familiar working with Callidus Reporting and Analytical tools, including dynamic reports, static reports, visual dashboards and the data environments they are built upon. Additionally, students will become familiar with the data structures, including the Universe as well as the Reporting & Analytic security architecture

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 Crystal Reports
- Understand the Reporting & Analytics security architecture

Prerequisites

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

Creating Web Intelligence Reports

For On Demand Edition

Audience This self-paced course is intended for Managers, Report Administrators, and others working with reporting & analytics.

Duration

Delivery Method	Course Length
Self-paced training	1 Hour

Description This course demonstrates how Business Objects Web Intelligence Reports are created within Callidus Reporting & Analytics.

- Objective** Upon completion, students will be able to:
- Create Basic & Detailed Web Intelligence Reports
 - Understand “The Universe”
 - Create Queries & Query Filters
 - Create Various Tables
 - Format & Filter Reports
 - Modify Existing Reports
 - Add Charts & Graphics
 - Create Alerters
 - Publish Reports
 - Save Reports In Various File Types

End User Reporting For On Demand Edition

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
Self-paced training	30 minutes

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

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

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

Prerequisites

- Familiarity with compensation terminology
- Familiarity with Microsoft Windows

Objective Management

Objective Management For On Demand Edition

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
Self-paced training	1.5 hours

Description The Objective Management 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*

Quota Management

Quota Management For On Demand Edition

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 for Payees who need to be able to review and accept quota objective programs.

Duration

Delivery Method	Course Length
Self-paced training	1 hour

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 in implementing 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*

Communicator

Using the Communicator

For On Demand Edition

Audience This self-paced course is intended for administrators, managers and payees who will be creating, requesting or receiving a company’s compensation plan communication process that requires approval by all parties involved.

Duration

Delivery Method	Course Length
Self-paced training	45 Minutes

Description This course is designed to introduce students to the Communicator user- interface and request process. Other topics include how to create, implement and communicate a compensation plan, and requirements and workflow features.

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

- Identify the steps in the Communicator workflow
- Create a program template
- Distribute a program to various members
- Adjust and allocate quotas
- Review and accept compensation proposals

Data Administration

Data Administration For Enterprise Edition

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 Live Web	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 environment
- Manage user security
- Manage the transfer of implementation and plan data
- Understand the Calculation process
- Describe the architecture of the Callidus databases
- Deploy, Configure, and populate the Datamart

Prerequisites

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

Channel Management

TrueProducer

For On Demand and Enterprise Editions

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*