

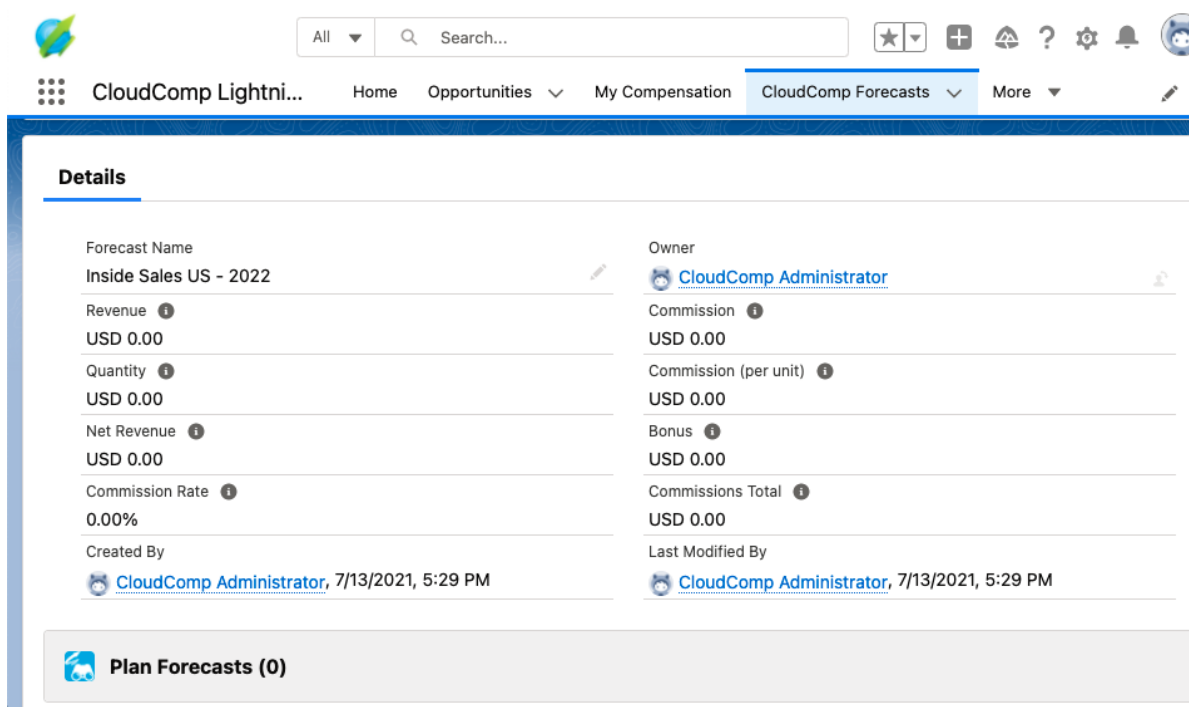


CloudComp Commission Anything™ Forecasting and Modeling



For many organizations, sales commissions are the highest variable expense and unfortunately, sales commissions and related revenue margins can be very challenging to forecast.

CloudComp Forecasting and Modeling enables you to perform powerful Commissions and Revenue Forecasting and Modeling using your existing or new CloudComp Compensation Plans.



The screenshot shows the CloudComp Commission Anything Forecasting and Modeling interface. The top navigation bar includes a search bar, a star icon, a plus icon, a bell icon, a question mark icon, a gear icon, and a user profile icon. The main navigation bar includes a grid icon, "CloudComp Lightni...", "Home", "Opportunities", "My Compensation", "CloudComp Forecasts", and "More". The "CloudComp Forecasts" section is active, showing a "Details" view for a forecast named "Inside Sales US - 2022". The details are organized into two columns. The left column includes: Forecast Name (Inside Sales US - 2022), Revenue (USD 0.00), Quantity (USD 0.00), Net Revenue (USD 0.00), Commission Rate (0.00%), and Created By (CloudComp Administrator, 7/13/2021, 5:29 PM). The right column includes: Owner (CloudComp Administrator), Commission (USD 0.00), Commission (per unit) (USD 0.00), Bonus (USD 0.00), Commissions Total (USD 0.00), and Last Modified By (CloudComp Administrator, 7/13/2021, 5:29 PM). At the bottom, there is a "Plan Forecasts (0)" button.

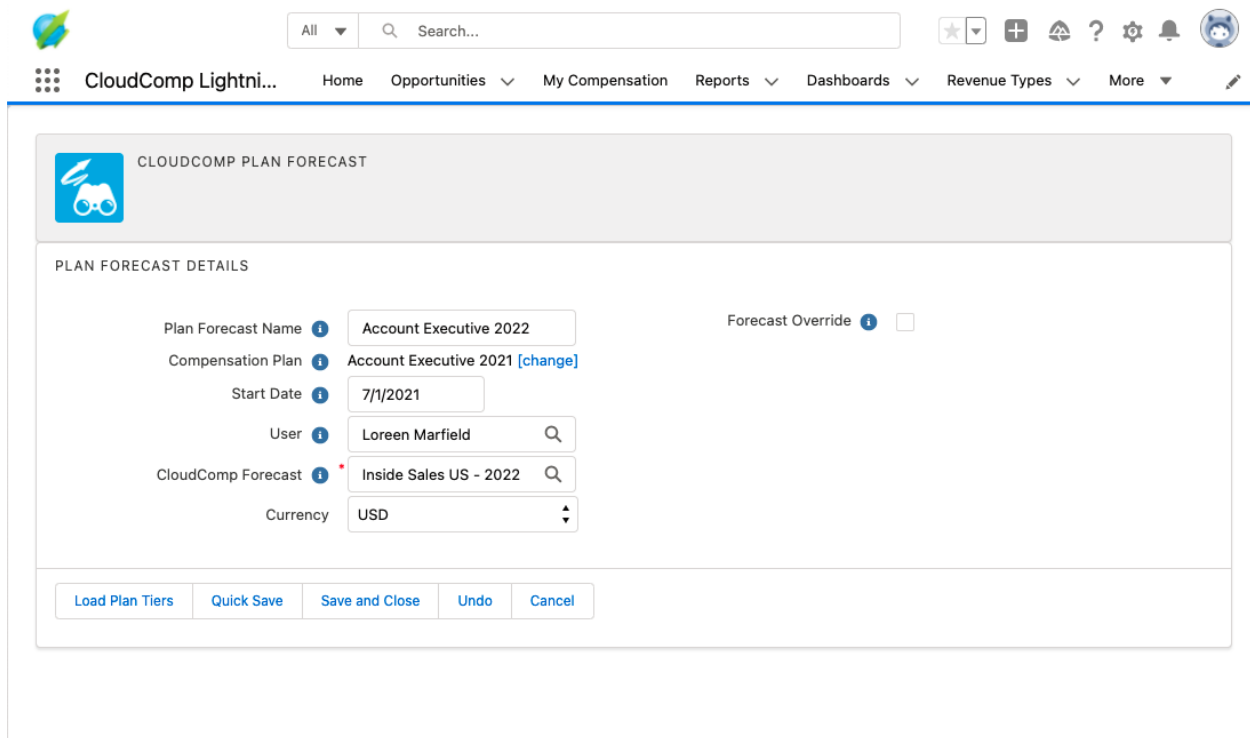
Details	
Forecast Name	Owner
Inside Sales US - 2022	CloudComp Administrator
Revenue	Commission
USD 0.00	USD 0.00
Quantity	Commission (per unit)
USD 0.00	USD 0.00
Net Revenue	Bonus
USD 0.00	USD 0.00
Commission Rate	Commissions Total
0.00%	USD 0.00
Created By	Last Modified By
CloudComp Administrator, 7/13/2021, 5:29 PM	CloudComp Administrator, 7/13/2021, 5:29 PM

Plan Forecasts (0)

Figure 1 - You can create an unlimited number of CloudComp Forecast™ records

CloudComp Forecasting and Modeling is not just for Commissions Administrators! CloudComp Forecasting and Modeling has been specifically designed to equip resources at all levels within your Sales and Finance Organizations to collaborate on forecasts or model their own private scenarios, at the Deal, Individual, Team or Organization levels.

You can create an unlimited number of CloudComp ForecastTM Records and each one can contain an unlimited number of CloudComp Plan ForecastTM records.



The screenshot shows the 'CLOUDCOMP PLAN FORECAST' form in the CloudComp Lightning interface. The form is titled 'PLAN FORECAST DETAILS' and contains the following fields:

- Plan Forecast Name: Account Executive 2022
- Compensation Plan: Account Executive 2021 [change]
- Start Date: 7/1/2021
- User: Loreen Marfield
- CloudComp Forecast: Inside Sales US - 2022
- Currency: USD

There is also a 'Forecast Override' checkbox which is currently unchecked. At the bottom of the form, there are five buttons: 'Load Plan Tiers', 'Quick Save', 'Save and Close', 'Undo', and 'Cancel'.

Figure 2 - CloudComp ForecastsTM aggregate the sums of a collection of 1 or many child CloudComp Plan ForecastTM records.

CloudComp Plan Forecasts enable you to use any of your CloudComp Multi-Tier Compensation Plans as a template for a forecast. The Plan Forecast can represent the outcome of anything from one sales deal to the total sales of an individual or a team

who share a compensation plan. Additional Plan Forecasts can be created to represent the production of other individuals or teams who are on different compensation plans within your organization. The aggregate of all Plan Forecasts roll up under your particular CloudComp Forecast, thereby giving you ultimate flexibility in your forecasting and modeling.

You can create a Plan Forecast in a few seconds. The Compensation Plan Tiers of the chosen Compensation Plan are imported, but the commission variables are changeable for you in your Plan Forecast. Meaning you can experiment with changes to your Compensation Plan Tiers from within your Plan Forecast!

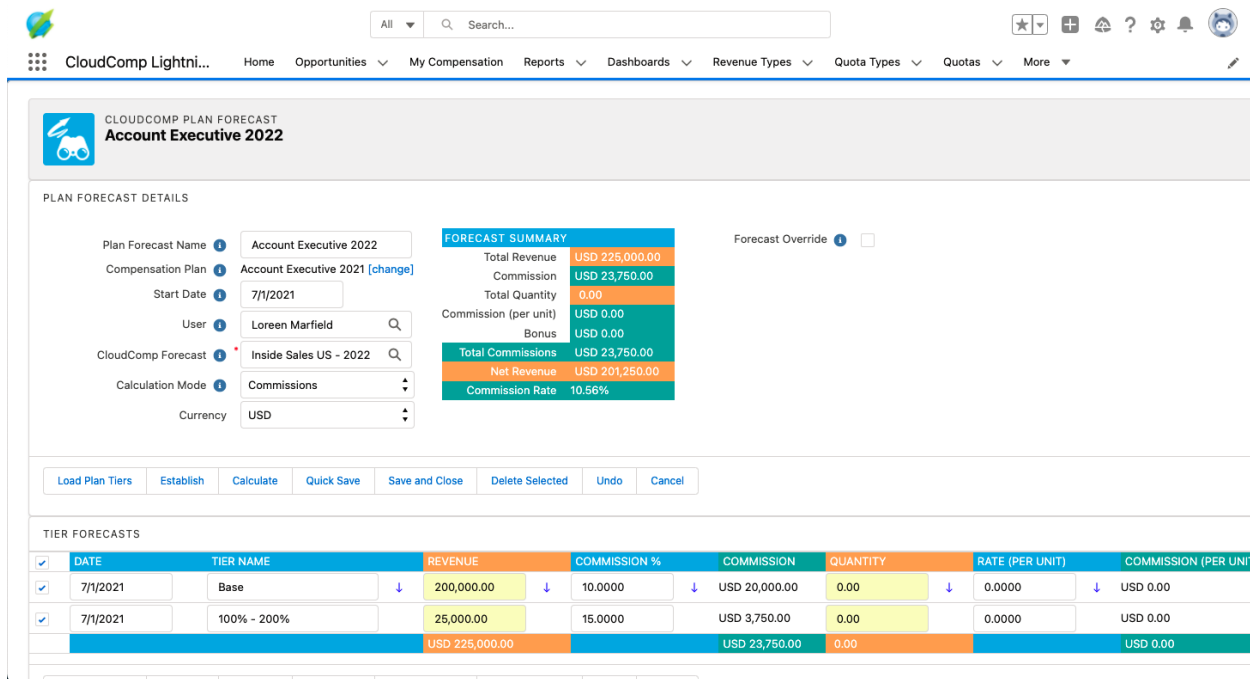
The obvious What-If scenarios you want to solve whether for one sales deal or for an individual or team are “if I pay X in Commission Rates, what would the total Commissions Expense be and what would the Total Sales be?” or “If Sales = Y, what would the cost of Commissions and Sales Margin be?”

The screenshot displays the 'CLOUDCOMP PLAN FORECAST' interface for 'Account Executive 2022'. The 'PLAN FORECAST DETAILS' section includes fields for Plan Forecast Name, Compensation Plan, Start Date, User, CloudComp Forecast, Calculation Mode, and Currency. A 'FORECAST SUMMARY' table shows values for Total Revenue, Commission, Total Quantity, Commission (per unit), Bonus, Total Commissions, Net Revenue, and Commission Rate. Below this is a 'TIER FORECASTS' table with columns for DATE, TIER NAME, REVENUE, COMMISSION %, COMMISSION, QUANTITY, RATE (PER UNIT), and COMMISSION (PER UNIT). The interface also features a 'Forecast Override' toggle and a row of action buttons: Load Plan Tiers, Establish, Calculate, Quick Save, Save and Close, Delete Selected, Undo, and Cancel.

CLOUDCOMP PLAN FORECAST							
Account Executive 2022							
PLAN FORECAST DETAILS							
Plan Forecast Name	Account Executive 2022			FORECAST SUMMARY		Forecast Override ☐	
Compensation Plan	Account Executive 2021 [change]			Total Revenue		USD 0.00	
Start Date	7/1/2021			Commission		USD 0.00	
User	Loreen Marfield			Total Quantity		0.00	
CloudComp Forecast	Inside Sales US - 2022			Commission (per unit)		USD 0.00	
Calculation Mode	Commissions			Bonus		USD 0.00	
Currency	USD			Total Commissions		USD 0.00	
				Net Revenue		USD 0.00	
				Commission Rate		0.00%	
Load Plan Tiers Establish Calculate Quick Save Save and Close Delete Selected Undo Cancel							
TIER FORECASTS							
DATE	TIER NAME	REVENUE	COMMISSION %	COMMISSION	QUANTITY	RATE (PER UNIT)	COMMISSION (PER UNIT)
7/1/2021	Base	0.00	10.0000	USD 0.00	0.00	0.0000	USD 0.00
7/1/2021	100% - 200%	0.00	15.0000	USD 0.00	0.00	0.0000	USD 0.00
		USD 0.00		USD 0.00	0.00		USD 0.00

Figure 3 - Toggle between Calculation modes to pivot on Sales or Commissions What-If Scenarios

CloudComp Plan Forecasts supports these What-If scenarios with the ability to toggle between the Calculation Mode: “Commissions”, which enables entering sales amounts (see yellow shading in Figures 3 and 4) to calculate commission payouts and net sales margin after commissions and the Calculation Mode: “Performance” which enables entering commission values to calculate total sales and sales margin after commissions expense.



PLAN FORECAST DETAILS

Plan Forecast Name: Account Executive 2022
 Compensation Plan: Account Executive 2021 [change]
 Start Date: 7/1/2021
 User: Loreen Marfield
 CloudComp Forecast: Inside Sales US - 2022
 Calculation Mode: Commissions
 Currency: USD

FORECAST SUMMARY

Total Revenue	USD 225,000.00
Commission	USD 23,750.00
Total Quantity	0.00
Commission (per unit)	USD 0.00
Bonus	USD 0.00
Total Commissions	USD 23,750.00
Net Revenue	USD 201,250.00
Commission Rate	10.56%

Forecast Override: ☐

Buttons: Load Plan Tiers, Establish, Calculate, Quick Save, Save and Close, Delete Selected, Undo, Cancel

TIER FORECASTS

DATE	TIER NAME	REVENUE	COMMISSION %	COMMISSION	QUANTITY	RATE (PER UNIT)	COMMISSION (PER UNIT)
7/1/2021	Base	200,000.00	10.0000	USD 20,000.00	0.00	0.0000	USD 0.00
7/1/2021	100% - 200%	25,000.00	15.0000	USD 3,750.00	0.00	0.0000	USD 0.00
		USD 225,000.00		USD 23,750.00	0.00		USD 0.00

Figure 4 - Enter projected currency and quantity by Plan Tier to generate your Plan Forecast

So this architecture gives you an extremely powerful Sales Commissions and Revenue calculator for all levels of Sales and Finance, but what if you need to model your forecasts across fiscal periods?

Every Plan Forecast can be easily expanded to become a Daily, Weekly, Quarterly or Annual Revenue and Commissions Forecast with just a few more clicks!

Simply click the “Establish” Button and a familiar, intuitive forecast scheduling interface (figure 5) opens up to enable you to repeat or divide your Plan Forecast across time!



CloudComp Lightni...

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Plan Forecast Name

Account Executive 2022

Compensation Plan

Account Executive 2021 [change]

Start Date

7/1/2021

User

Loreen Marfield

CloudComp Forecast

Inside Sales US - 2022

Calculation Mode

Commissions

Currency

USD

FORECAST SUMMARY

Total Revenue

USD 225,000.00

Commission

USD 23,750.00

Total Quantity

0.00

Commission (per unit)

USD 0.00

Bonus

USD 0.00

Total Commissions

USD 23,750.00

Net Revenue

USD 201,250.00

Commission Rate

10.56%

Forecast Override

☐

Calculate

Quick Save

Save and Close

Delete Selected

Undo

Cancel

ESTABLISH FORECAST

Start Date

7/1/2021

Schedule Type

Repeat

Installment Period

Quarterly

Number of Installments

4

Generate Forecast

TIER FORECASTS

	DATE	TIER NAME	REVENUE	COMMISSION %	COMMISSION	QUANTITY	RATE (PER UNIT)	COMMISSION (PER UNIT)
☒	7/1/2021	Base	200,000.00	10.0000	USD 20,000.00	0.00	0.0000	USD 0.00
☒	7/1/2021	100% - 200%	25,000.00	15.0000	USD 3,750.00	0.00	0.0000	USD 0.00
			USD 225,000.00		USD 23,750.00	0.00		USD 0.00

Figure 5 - Generating a Quarterly Forecast from a 2 Tier Compensation Plan

Figure 5 (above) shows an example of generating a Quarterly Plan Forecast from a 2 Tier Compensation Plan. When you click Generate Forecast, you'll get 4 Quarterly instances of the 2 Plan Tiers and all are editable! So you can change the values in individual Quarterly Tiers to represent seasonal changes in projected Sales or Rules changes in Commission Rates.

You can save the Plan Forecast with all of its new Tiers and Clone it as many times as you wish to make additional versions all of which roll up to the parent CloudComp Forecast.

The CloudComp Forecasting and Modeling architecture is designed to enable the best possible combination of flexibility to use your numbers, your approaches to forecast your way, with the power to rapidly build a detailed Sales and Commissions Forecast that is granular across individuals, teams, divisions and fiscal periods.

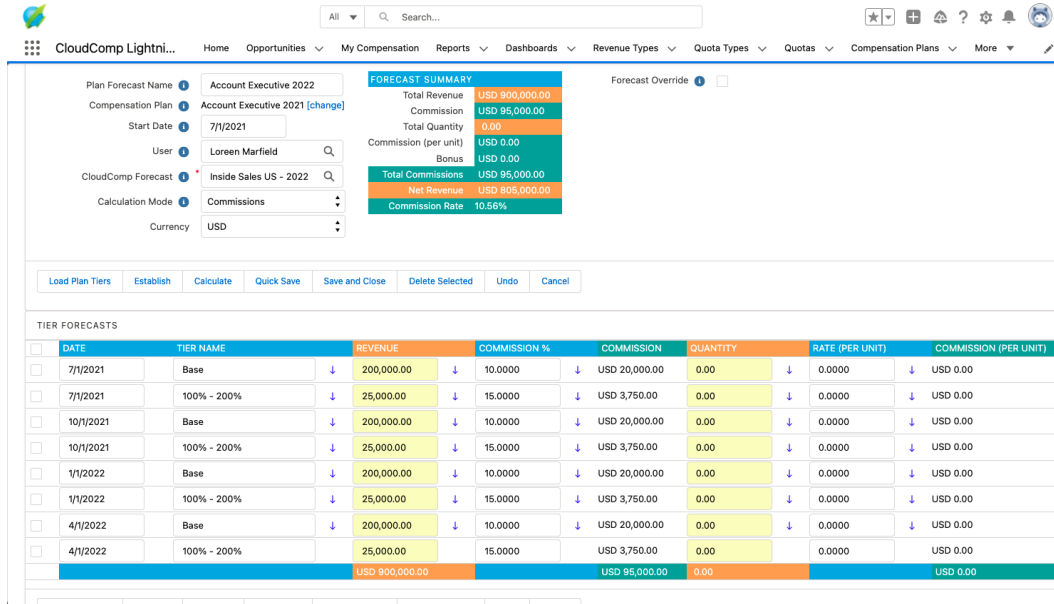


Figure 6 - 2 Tier Compensation Plan Expanded Across 4 Quarters

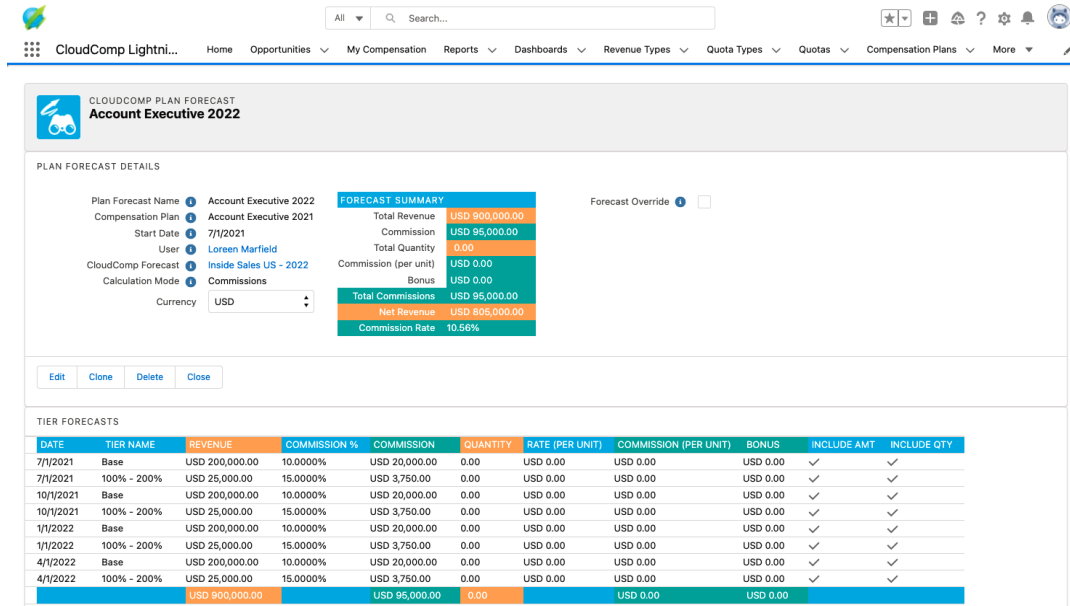
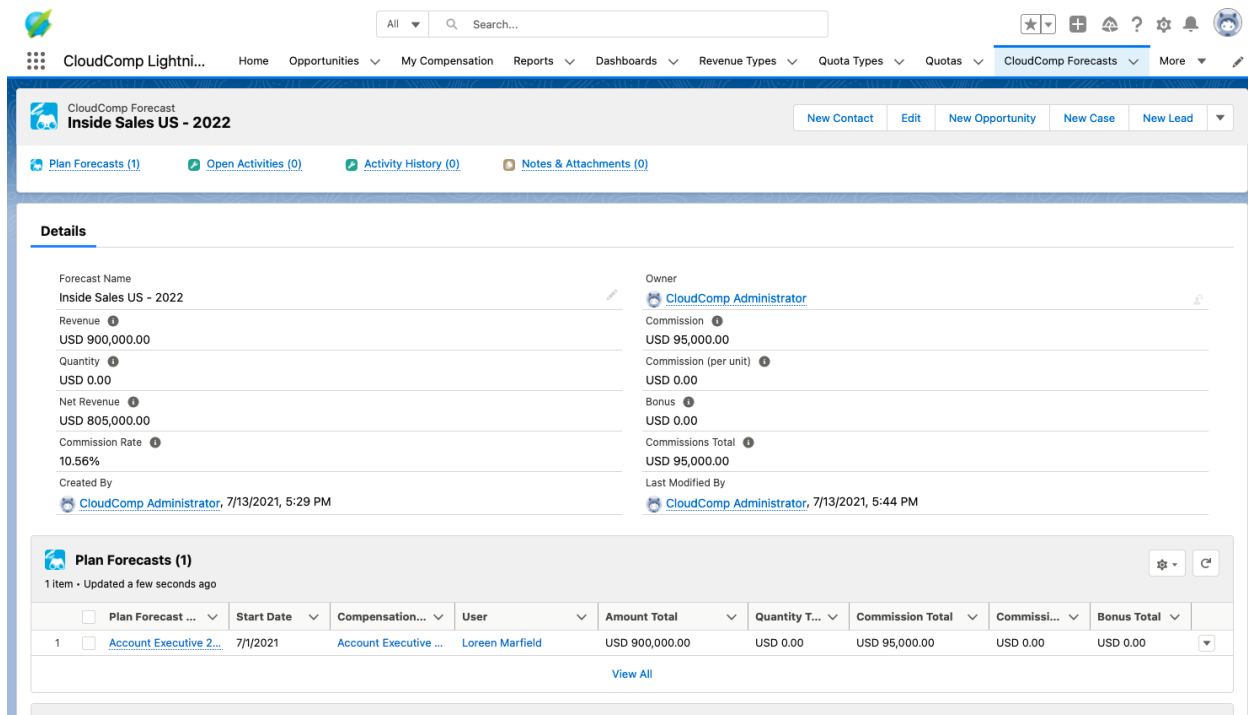


Figure 7 - Quarterly Plan Forecast Saved

The ability to rapidly create Plan Forecasts and, expand them across Fiscal Periods, clone and modify them for different deals, individuals, teams or Commission / Revenue modeling scenarios makes CloudComp Forecasting and Modeling the most powerful, agile and flexible tool in this market for your Commissions and Revenue Forecasting needs!



The screenshot shows the CloudComp Lightning interface. At the top, there's a navigation bar with tabs like Home, Opportunities, My Compensation, Reports, Dashboards, Revenue Types, Quota Types, Quotas, and CloudComp Forecasts. The main content area displays a forecast for 'Inside Sales US - 2022'. The forecast details include:

- Forecast Name: Inside Sales US - 2022
- Revenue: USD 900,000.00
- Quantity: USD 0.00
- Net Revenue: USD 805,000.00
- Commission Rate: 10.56%
- Created By: CloudComp Administrator, 7/13/2021, 5:29 PM
- Owner: CloudComp Administrator
- Commission: USD 95,000.00
- Commission (per unit): USD 0.00
- Bonus: USD 0.00
- Commissions Total: USD 95,000.00
- Last Modified By: CloudComp Administrator, 7/13/2021, 5:44 PM

Below the details, there's a section for 'Plan Forecasts (1)' with a table showing one item:

Plan Forecast ...	Start Date	Compensation...	User	Amount Total	Quantity T...	Commission Total	Commissi...	Bonus Total
Account Executive 2...	7/1/2021	Account Executive ...	Loreen Marfield	USD 900,000.00	USD 0.00	USD 95,000.00	USD 0.00	USD 0.00

Figure 8 - Plan Forecasts roll up to CloudComp Forecasts

If you have questions about CloudComp Forecasting and Modeling or you would like to schedule a live demo, please feel free to contact us today at surfwriter.com/contact