**Incentive Program Design Worksheet**

**Specify the objectives.**In measurable terms, list your objectives noting primary and secondary (e.g., Primary: Increase sales per individual by 15% for the year resulting in $3M total increase)

**Audience for the incentive.**Which internal teams or divisions, or external dealers, agents or distributors will be part of the incentive program

**Determine WIIFM.**Based on knowledge and past experience, identify what this audience finds motivating and what will get their attention. Remember, it needs to be important to the participant!

**Recommended Program Structure**. Open-end? Closed-end? Minimum thresholds? Incremental bonuses? Self-funding?

**Determine the award system.**If Group Travel is your primary award, will there be other awards for progress along the way? Are you creating tiers (eg. Top 3% earn the trip, the next 5% get gift cards). Consider if you’re only trying to motivate top performers, or if you want to structure your program to appeal to the “middle 60%” as well.

**Develop a tracking system.**How will you validate? Recognize? Update? Motivate? Consider third party tracking programs. Again, make sure the qualification criteria are clear and measurable. What system will you use to track?

**Decide who will run the program.**In-house? Third-party? Dealer or partner administrators?

**Write the rules.**Consider clarity, simplicity, achievability and trackability. Ensure program participants will understand how their efforts will be measured.

**Establish a communications plan.**

How will you announce and drive adoption?

What will you do to keep participants engaged and motivated during the earning period?

How will you report progress to participants and leadership?

**Consider the role of training.**Does the team know what they need to know? If your incentive is meant to drive a new behavior or sell a new product make sure the team is properly trained before launching.

**Develop your budget.**To gain a clear sense of program budget you need to consider all costs including:

Program Design

Program Administration

Communications

Training Cost (if required)

Interim Rewards

Travel Program

Post-program measurement

Estimated Total Program Cost:

**Launch and track the program.**Launch, support, communicate and monitor. If you’ve chosen your reward destination you can theme your launch around the destination to build excitement. This is a great chance to make sure rules are clear and motivation is high!

**Conclude the program.**Generate reports and determine winners.

**Announce and show your appreciation.**Presentation is as important as the award itself. Where will it happen? Who will be part of the announcement? Again, use your destination for inspiration.

**Evaluate and change.**Measure to prove what worked and improve what didn’t. Return on Investment models range from the simple to the complex. Start by understanding what’s meaningful to your leadership. How will you capture attendee feedback? Who needs to receive the report?