

Workforce Planning Performance Blueprint Powered by TM1



Executive summary

This application brief describes the objectives and the content of a Web-based planning application for managing headcount and compensation planning projections using IBM Cognos® TM1 9.5 Contributor and Cognos 8.4 Business Intelligence. By implementing the *IBM Cognos Workforce Planning Blueprint Powered by TM1*, a company will have forward-looking visibility into workforce decisions at the operational level, at the company level as a whole and by geographical preference. Headcount projections can be used to drive other planning processes of the organization. The *Blueprint* and processes described in this document apply to employees in any industry. You can configure the model to support the complexity of fixed and variable compensation requirements for any industry. There are also a number of countries reflected in the design.

Introduction

Employee-related costs often make up the greatest share of corporate operating expenses. It is no surprise, then, that executive management focuses on controlling employee expenses in every way possible. At divisional and departmental levels, however, managers must make hiring and compensation decisions that will help their units meet objectives: hiring the right people for the right jobs, compensating them fairly, helping them become productive and retaining them for as long as possible.

Human Resources (HR) administers the headcount and compensation planning process. It makes sure managers adhere to corporate hiring and compensation policies. HR seeks forward visibility for hiring decisions so that it can source the best talent. It analyzes employee trends, such as attrition, so that their corporation can make decisions to help retain top talent.

Workforce planning helps corporations manage cross-enterprise employee headcount, compensation and benefit costs so that they can align business unit decisions with corporate objectives. However, most companies use human resource management systems and spreadsheets for the planning process, which often creates errors, delay and difficulty.

Consequently, executive management, finance and HR are looking for tools and disciplines to manage headcount and compensation planning. To boost accuracy in this vital planning process, a solution with flexible modeling capabilities, personalized analytics and integrated workflows is required. The *Workforce Planning Performance Blueprint Powered by TM1* is that solution, enabling an integrated workforce planning process that aligns corporate financial objectives with divisional workforce decisions.

IBM Cognos Performance Blueprints are pre-configured solution building blocks that enable companies to jump-start their implementations. Blueprints are pre-defined data models that encapsulate the collective best-practice knowledge from the IBM Cognos Innovation Center for Performance Management and its leading customers in specific business process areas. Blueprints enable streamlined project implementation schedules and improve project success rates.

Using the *Workforce Planning Blueprint Powered by TM1*, companies can align corporate financial objectives with divisional workforce decisions. Links to business drivers in other planning areas—such as sales or customer service—can be established to ensure proper alignment with headcount plans. Staff managers throughout a corporation can manage existing and new employee headcounts from one integrated system. Salary, merit and bonus decisions can be managed at the employee level, group level or both. The complexity of fixed and variable compensation requirements can be managed for any industry and company—even those spread over multiple countries.

More specifically, the *Blueprint* helps your company:

- Manage headcount for existing and new employees.
- Manage salary, merit and bonus decisions at the employee and/or group level.
- Determine benefit and tax expenses in multiple countries.
- Link salary and headcount projections as drivers for other items on an expense plan.
- Demonstrate variable compensation capabilities.
- Demonstrate internal transfer planning capabilities.

The *Workforce Planning Blueprint Powered by TM1* has two primary components:

- Reporting, analysis and dashboards using Cognos 8 Business Intelligence
- Planning and forecasting using Cognos TM1 Contributor

The remainder of this document describes these components in detail.

Business intelligence model

The Workforce Planning Dashboard presents critical information to executives at a glance. The top graphs present the trending statistics for salary and headcount over the course of the year. The middle left graphs focus on adjustments and the middle right graph uses drill up and drill down functionality to display total headcounts at the department level so managers can see how employee salaries contribute to the overall totals.



The Employee Summary report prompts a user to select a department and provides the employee details for a breakdown on vital salary related attributes.

Cognos Viewer - Workforce Planning Blueprint | Bob Russell - Innovation Center | Log On | Launch | About

Workforce Planning Dashboard | Reports Menu | Workforce Planning TM1

Workforce Planning TM1 Model | Report Page | Back to default entry

TM1 Model
Name: Workforce Planning TM1 Model

Managed Reports
Name: Compensation Letter
Corporate Guidelines Summary
Employee Information
Employee Summary
HR Exceptions
New Employee Count by Month

Ad-hoc
Name: Existing Employees New Salary Breakdown by Org

Cognos Search
Search: Name field
Advanced

Employee Details

Australia Comp

| Employee | Status | FTE | Action | Action Date | Current Department | Transfer To | Severance | Merit Increase | Merit Month | New Salary | Rec. Bonus | Stock Options | % of Midpoint | Bonus Adjustment | Salary w/ Bonus | Performance | Previous Rating |
|-------------------|--------|------|--------|-------------|--------------------|-------------|-----------|----------------|-------------|------------|------------|---------------|---------------|------------------|-----------------|-------------|-----------------|
| Sally Foster | | 1.00 | | | | | \$0 | \$115 | Dec | \$46,050 | \$3,684 | 0 | 100.73% | \$0 | \$49,734 | Medium | Low |
| Samantha Hamill | | 1.00 | | | | | \$0 | \$141 | Dec | \$33,927 | \$6,785 | 0 | 101.03% | \$0 | \$40,712 | High | Medium |
| Shayne Reese | | 1.00 | | | | | \$0 | \$671 | Nov | \$134,802 | \$18,872 | 0 | 100.27% | \$0 | \$153,674 | Medium | Medium |
| Sophie Edington | | 1.00 | | | | | \$0 | \$2,640 | Jan | \$55,432 | \$12,195 | 0 | 100.66% | \$0 | \$67,627 | High | Medium |
| Stephanie Rice | | 1.00 | | | | | \$0 | \$4,683 | Jun | \$111,713 | \$35,748 | 0 | 100.29% | \$0 | \$147,462 | Star | Medium |
| Tamara White | | 1.00 | | | | | \$0 | \$310 | Apr | \$41,675 | \$0 | 0 | 100.78% | \$0 | \$41,675 | Low | Medium |
| Travis Niederpelt | | 1.00 | | | | | \$0 | \$1,867 | Feb | \$29,021 | \$8,706 | 0 | 101.49% | \$0 | \$37,728 | Star | Medium |

Top | Page up | Page down | Bottom

There is a compensation letter report that management can use to inform an employee about their performance review and merit increase. This form-based letter pulls the data from the Workforce Planning details.

Cognos Viewer - Workforce Planning Blueprint | Bob Russell - Innovation Center | Log On | Launch | About

Workforce Planning Dashboard | Reports Menu | Workforce Planning TM1

Workforce Planning TM1 Model | Report Page | Back to default entry

TM1 Model
Name: Workforce Planning TM1 Model

Managed Reports
Name: Compensation Letter
Corporate Guidelines Summary
Employee Information
Employee Summary
HR Exceptions
New Employee Count by Month

Ad-hoc
Name: Existing Employees New Salary Breakdown by Org

Cognos Search
Search: Name field
Advanced

Dec 24, 2009

ATTN: Kristi Harrower
DEPT: Australia Production

Dear Kristi Harrower,

After reviewing your performance, we have evaluated you as a High performer compared to your performance rating from last year as a Medium performer. After achieving the current performance level and evaluating your base salary of \$105,203.42 which is 1.0% of the midpoint at \$0 we are adjusting your current salary by \$1,315.04 - 0% which brings your new base salary to \$106,818.46. We also are adjusting your bonus amount \$26,704.62 - 25.00%. Effective immediately your new salary with bonus is \$133,523.08 and will be paid on future imbursements.

Thank you,
Your Management Team

Dec 24, 2009
Top | Page up | Page down | Bottom

Planning Model

The *Workforce Planning Blueprint Powered by TM1* features a planning model based on a best-in-class planning process and technology with the following attributes:

- Driver-based
- Modeling flexibility
- High participation
- Top down/bottom up reconciliation
- Web-based deployment of models for data collection and consolidation.
- Real-time workflow
- Real-time consolidation
- Real-time calculations in the browser for immediate results
- Linking functionality to provide collaboration between all areas of the corporation.
- Capability to perform form-based planning with selection boxes to drive application logic and calculations

Real-time workflow visibility

When you log in to the planning application as an administrator, you see the Welcome screen, which displays the first level of the hierarchy for all areas of the company with Total Operations and Total Legal expanded another level down.

The screenshot displays the IBM Cognos TM1 Contributor web application interface. The browser window shows the URL: <http://ip-mvlcscv:3000/pepvc/bmpjs/workflow/workflow.jsp?portal=1&aid=%7B22c4e772-4cd5-4db1-bc1f-325e052661d1%7D>. The application title is "IBM Cognos TM1 Contributor" and the user is "admin".

The left sidebar shows a tree view of contributions, with "Total Operations" and "Total Legal" expanded. The main content area shows a table of contributions for "Germany Legal" and a detailed view for "Germany Legal".

| Name | State | Ownership | Reviewer | Last Data Commit |
|---------------|-------------|-----------|----------|------------------|
| Germany Legal | Not Started | None | ADMIN | Never committed |

Which consists of:

| Name | State | Ownership | Reviewer | Last Data Commit |
|------------------------------|-------------|-----------|----------|------------------|
| Germany Legal (All) | Not Started | None | ADMIN | Never committed |
| Germany General Counsel | Not Started | None | ADMIN | Never committed |
| Germany Patent Protection/TP | Not Started | None | ADMIN | Never committed |

Workflow Detail for Germany Legal

Commit state: Not Started
This contribution still requires an owner to edit or submit.

Viewed: no
Reviewed: no

You can expand each geographical operations area to get down to a department level. When an individual contributor logs on, the workflow perspective contains only those departments that he or she is responsible for. You can view additional information about the status of the plan and the individual department by clicking the down triangles for each cell. In the following example, we selected the down arrow next to Exec 51 for US Procurement to find out other contributors that could take ownership of this node in the hierarchy. The same row provides information about the state of the node, which in this case is Work in Progress, and the last time data was saved and by whom.

The screenshot shows the IBM Cognos TM1 Contributor interface. On the left is a tree view of the organizational hierarchy. The main area on the right displays a table of nodes and their details.

Tree View (Left):

- Total Company
 - Total Operations
 - Australia Operations
 - Australia Procurement
 - Australia Manufacturing Control
 - Australia QC/QA
 - Australia Production
 - Japan Operations
 - Japan Procurement
 - Japan Manufacturing Control
 - Japan QC/QA
 - Japan Production
 - US Operations
 - US Procurement
 - US Manufacturing Control
 - US QC/QA
 - US Production
 - France Operations
 - France Procurement
 - France Manufacturing Control
 - France QC/QA
 - France Production
 - UK Operations
 - UK Procurement
 - UK Manufacturing Control
 - UK QC/QA
 - UK Production

Main View (Right):

You are a reviewer or contributor for:

| Name | State | Ownership | Reviewer | Last Data Commit |
|---------------|------------|-----------|----------|------------------|
| US Operations | Incomplete | None | ADMIN | Never committed |

Which consists of:

| Name | State | Ownership | Reviewer | Last Data Commit |
|--------------------------|------------------|-----------|----------|---------------------------------|
| US Operations (All) | Incomplete | | ADMIN | |
| US Procurement | Work In Progress | Exec 51 | ADMIN | October 19, 2009 3:43:53 PM CDT |
| US Manufacturing Control | Not Started | None | ADMIN | Never committed |
| US QC/QA | Not Started | None | ADMIN | Never committed |
| US Production | Not Started | None | ADMIN | Never committed |




Ownership Information for US Procurement

Current owner: Exec 51

Groups that could own this node:

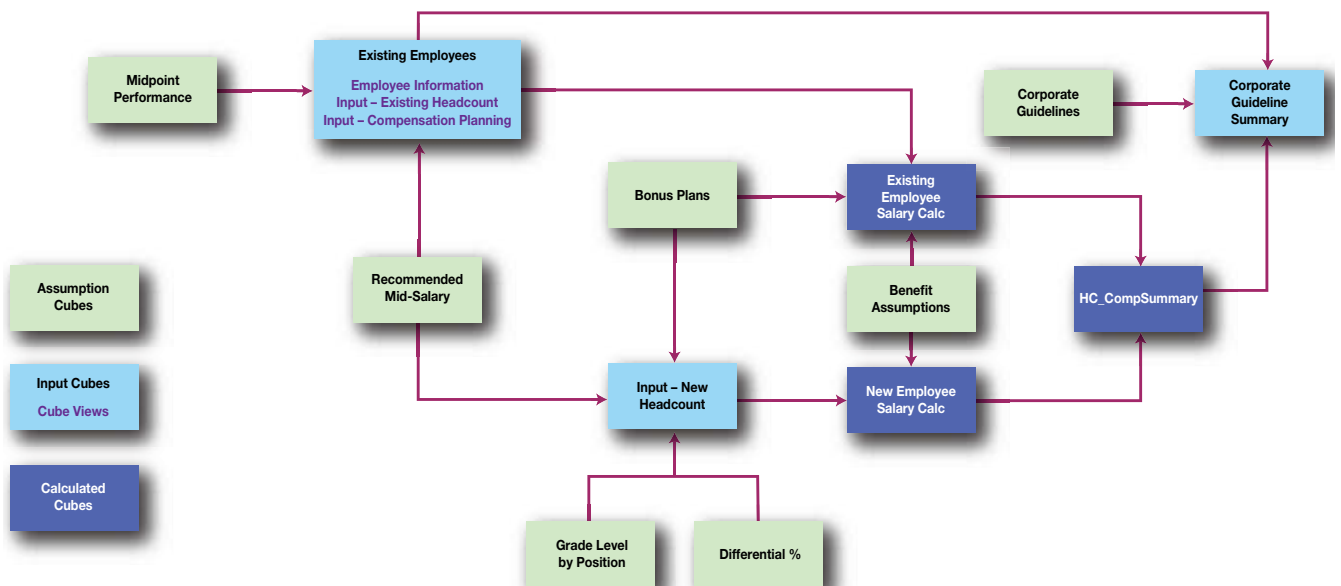
- ADMIN
- Exec 1
- Exec 3
- Exec 51
- ADMIN
- Exec 1
- Exec 5
- Exec 51

From Total Company, the model breaks down into seven operational areas (Operations, Legal, HR, IT, Finance, Administration and Sales), which are then broken down by country (Australia, Japan, U.S., France, U.K. and Germany). There are 98 departments rolling up to these 6 countries. You can create any hierarchical design you desire. The application also calculates the appropriate taxes based upon country, such as Social Security in the U.S., Superannuation Guarantee (GS) in Australia or CSG (general social contribution) in France.

Before anyone enters data, the state of the plan is designated as  **Not started**. After someone saves a plan, the state becomes  **Work in progress** and remains accessible for further editing. When a contributor submits an item, the plan is  **Locked** and no more changes can be made. The locked state indicates that the plan is ready for review. A reviewer can review the plan in any state, but can only reject a locked plan item. When a locked plan is rejected, it returns to the work in progress state and a departmental manager can make changes to it.

When the workflow status changes, data consolidation and aggregation all occur in real-time, without the need for a batch process to be performed for the database.

The following chart highlights the work and information flows for the planning application:



The cubes represented above in light **blue** are the points in the model where a contributor may enter data. The model is designed around existing employees and new employees. The Existing Employees cube has three views; **Employee Information**, **Input - Existing Headcount** and **Input Compensation Planning**. Input New Headcount is where new employee information is entered. The dark **blue** cubes are either calculated or consolidated cubes. The light green cubes hold assumption data used in the application. The sections that follow describe these cubes in greater detail.

Employee Information

The first tab in the *Blueprint* is **EmployeeInformation**. It is here that the forecasting and budgeting process begins. A user may view the employees that currently report to a specific department and see information uploaded from your current payroll system. This information is used for calculating both salaries and benefits in the application. A user may change someone's health plan, work location or position from this input screen. This tab is a view of the Existing Employees cube in the model. Here, we have logged in as the contributor to U.S. Procurement. If we had the security clearance and were to log into a different department, we would see the employees in that specific department.

| Department | Employee # | FT/PT | FTE | Merit Month | Salary | Position | Grade | Location | Health Plan |
|-------------------------|------------|-------|----------|-------------|----------------|------------------------|-------|-----------------|-----------------|
| Total Company | | | 7 | | 252,668 | | | | |
| Total Operations | | | 7 | | 252,668 | | | | |
| US Operations | | | 7 | | 252,668 | | | | |
| US Procurement | | | 7 | | 252,668 | | | | |
| Naton, Anne | 1101 15613 | FT | 1 | Jun | 37,656 | Senior Buyer | 8 | Minneapolis, MN | Individual Plan |
| Owens, Julie A | 1101 18454 | FT | 1 | Apr | 43,310 | Senior Buyer | 8 | Chicago, IL | |
| Post, Karen K | 1101 19204 | FT | 1 | Feb | 50,817 | Purchase & Sales Coord | 8 | New York, NY | Family Plan |
| Serginson, Dawn R | 1101 15697 | FT | 1 | Mar | 38,557 | Accounting Mgr | 9 | Boston, MA | Individual Plan |
| Shepherd, Kelly Ann | 1101 15950 | FT | 1 | Nov | 25,360 | Order Clerk | 3 | Los Angeles, CA | Individual Plan |
| Smith, Heather M | 1101 15788 | FT | 1 | Mar | 32,658 | Advisory Serv Spec | 7 | Minneapolis, MN | Individual + 1 |
| Spencer, Cecilia | 1101 16048 | FT | 1 | Sep | 24,310 | Order Clerk | 3 | Chicago, IL | |

When a user is making selections for a specific employee, dropdown lists are available to aid the user wherever appropriate. The following screen shot shows the dropdown list for position. It becomes viewable when you click on the cell.

| | | | | | | | | | | | |
|--|--------------------------------------|------------|-------|-----|-------------|---------|--------------------------------|-------|-----------------|-----------------|----------------------------------|
| Rows: | Columns: | | | | | | | | | | Context: |
| ExistingEmployees [ExistingEmployees] | EmployeeDetails [EmployeeDetails] | | | | | | | | | | US Procurement [Organization] |
| | Department | Employee # | FT/PT | FTE | Merit Month | Salary | Position | Grade | Location | Health Plan | |
| [-] Total Company | | | | 7 | | 252,668 | | | | | |
| [-] Total Operations | | | | 7 | | 252,668 | | | | | |
| [-] US Operations | | | | 7 | | 252,668 | | | | | |
| [-] US Procurement | | | | 7 | | 252,668 | | | | | |
| Nation, Anne | 1101 | 15613 | FT | 1 | Jun | 37,656 | Senior Buyer | 8 | Minneapolis, MN | Individual Plan | |
| Owens, Julie A | 1101 | 18454 | FT | 1 | Apr | 43,310 | Senior Buyer | | Chicago, IL | | |
| Post, Karon K | 1101 | 19204 | FT | 1 | Feb | 50,817 | | | ork, NY | Family Plan | |
| Sarginson, Dawn R | 1101 | 15697 | FT | 1 | Mar | 38,557 | Account Consultant | | n, MA | Individual Plan | |
| Shepherd, Kelly Ann | 1101 | 15950 | FT | 1 | Nov | 25,360 | Account Entry Spclst | | geles, CA | Individual Plan | |
| Smith, Heather M | 1101 | 15788 | FT | 1 | Mar | 32,658 | Account Transfer Coordinator | | apolis, MN | Individual + 1 | |
| Spencer, Cecilia | 1101 | 16048 | FT | 1 | Sep | 24,310 | Accountant | | go, IL | | |
| | | | | | | | Accounting Clerk | | | | |
| | | | | | | | Accounting Coordinator | | | | |
| | | | | | | | Accounting Dir | | | | |
| | | | | | | | Accounting Mgr | | | | |
| | | | | | | | Accounts Processor I | | | | |
| | | | | | | | Actuarial Analyst | | | | |
| | | | | | | | Actuarial Assistant | | | | |
| | | | | | | | Actuarial Assistant I | | | | |
| | | | | | | | Actuarial Associate | | | | |
| | | | | | | | Actuarial Trainee | | | | |
| | | | | | | | Admin Assist II | | | | |
| | | | | | | | Admin Asst III | | | | |
| | | | | | | | Administrative Assistant | | | | |
| | | | | | | | Advisory Serv Spec | | | | |
| | | | | | | | Agency Manager | | | | |
| | | | | | | | Asc Real Estate Finance Legal | | | | |
| | | | | | | | Assoc Budget Analyst | | | | |
| | | | | | | | Assoc Case Coordinator | | | | |
| | | | | | | | Assoc Finance Dir | | | | |
| | | | | | | | Assoc New Business Rep | | | | |
| | | | | | | | Assoc, Mortgage Loan Servicing | | | | |
| | | | | | | | Associate Business Analyst | | | | |
| | | | | | | | Associate Call Center Director | | | | |
| | | | | | | | Associate Funding Rep | | | | |
| | | | | | | | Associate Imaging Clerk | | | | |
| | | | | | | | Associate New Business Coord | | | | |
| | | | | | | | Associate Office Support Clerk | | | | |
| | | | | | | | Associate Press Operator | | | | |
| | | | | | | | Associate Quality Analyst | | | | |
| | | | | | | | Associate Research Analyst | | | | |
| | | | | | | | Associate Voice Comm Specialis | | | | |

Input – Existing Headcount

The second tab in the *Blueprint*, **Input – Existing Headcount**, is also a view of the Existing Employees cube. After having first verified that we are working with the correct employee pool, we may now manage the status of our existing employees. For each employee, we may take the desired action and decide when said action starts.

| |
|------------------------|
| Active |
| Suspension w/Pay |
| Leave W/Pay |
| Change Merit Month to: |
| Term w/Severence |
| Transfer |
| Suspension |
| Leave |
| Retirement |
| Termination |

The Action Code field is a list of codes describing the reason for the Status change. Each of the codes has different business rules associated with it, and the financial ramifications are calculated automatically month-by-month for the user using standardized assumptions. There are no set limits to the number of Action Codes that can be set up in the system; additionally, any business rules and conditions can be set up.

The Action Date provides the effective month for the Status Change and the Corresponding Action Code. The Action Date drives the financial month-by-month changes that occur based on Status Changes or changes to an Action Code.

Below, for Dawn Sarginson, we have selected **Retirement** from the dropdown list for Action and received a Warning that this action needs a date.

| Employee Information Input - Existing Headcount Input - Compensation Planning Existing Employee Salary Calc Input - New Headcount New Employee Salary Calc Headcount Summary Corporate Guidelines Summary Benefit Assumptions Bonus Plans Corporate Guidelines Differential Grade/Level by Position Midpoint Performance Recommended Midpoint | | | | | | | | | | |
|---|------------|-------|-------------|--------|------------------|---------------------|-------------------|-------------|-----------|---|
| Rows: ExistingEmployees (ExistingEmployees) Columns: EmployeeDetails (EmployeeDetails) Contexts: US Procurement (Organization) | | | | | | | | | | |
| | Department | FT/PT | Merit Month | Status | Action | Action Date - Start | Action Date - End | Transfer To | Severance | Warning |
| Total Company | | | | | | | | | 5000 | |
| Total Operations | | | | | | | | | 5000 | |
| US Operations | | | | | | | | | 5000 | |
| US Procurement | | | | | | | | | 5000 | |
| Naton, Anne | 1101 | FT | Jun | | | | | | 0 | |
| Owens, Julie A | 1101 | FT | Apr | | | | | | 0 | |
| Post, Karon K | 1101 | FT | Feb | | Term w/Severance | Mar | | | 5000 | |
| Sarginson, Dawn R | 1101 | FT | Mar | | Retirement | | | | 0 | Selected Action Requires an Action Date |
| Shepherd, Kelly Ann | 1101 | FT | Nov | | | | | | 0 | |
| Smith, Heather M | 1101 | FT | Mar | | | | | | 0 | |
| Spencer, Cecilia | 1101 | FT | Sep | | | | | | 0 | |

When we make a selection from the Action Date - Start dropdown, the warning will disappear.

| ExistingEmployees (ExistingEmployees) EmployeeDetails (EmployeeDetails) US Procurement (Organization) | | | | | | | | | | |
|---|------------|-------|-------------|--------|------------------|---------------------|-------------------|-------------|-----------|---------|
| | Department | FT/PT | Merit Month | Status | Action | Action Date - Start | Action Date - End | Transfer To | Severance | Warning |
| Total Company | | | | | | | | | 5000 | |
| Total Operations | | | | | | | | | 5000 | |
| US Operations | | | | | | | | | 5000 | |
| US Procurement | | | | | | | | | 5000 | |
| Naton, Anne | 1101 | FT | Jun | | | | | | 0 | |
| Owens, Julie A | 1101 | FT | Apr | | | | | | 0 | |
| Post, Karon K | 1101 | FT | Feb | | Term w/Severance | Mar | | | 5000 | |
| Sarginson, Dawn R | 1101 | FT | Mar | | Retirement | Feb | | | 0 | |
| Shepherd, Kelly Ann | 1101 | FT | Nov | | | | | | 0 | |
| Smith, Heather M | 1101 | FT | Mar | | | | | | 0 | |
| Spencer, Cecilia | 1101 | FT | Sep | | | | | | 0 | |

Certain actions on the list also require an end date such as Suspension or Leave. A Termination with Severance would require a severance amount to prevent a warning.

Companies often have difficulty planning employee transfers in the upcoming year. Employees can sometimes “fall through the cracks” as a department recognizes the transfer out on their plan while the receiving department fails to recognize the incoming employee. The *Blueprint* has processes to manage planned employee transfers effectively.

Fields in gray cannot be edited. Fields in white can be edited and used to manage our existing headcount. As we make changes, they are highlighted in blue along with any cells affected by the change. As we make changes to this table, the headcount and salary impacts are being made automatically to all the other tabs affected by the changes.

Input – Compensation Planning

Input – Compensation Planning is the third tab in the *Blueprint* and the final view of the Existing Employees cube. In the first two tabs, we’ve made decisions about headcount planning for our existing employees. Here, we will manage their compensation. Doing so requires making decisions in four main areas.

We start by selecting a Performance level for each employee from a drop down list of predetermined choices. In our *Blueprint*, an employee may fall into the categories of **Star, High, Medium** or **Low**. This information combined with where an employee stands relative to their midpoint salary determines the recommended merit increase. We can then adjust the recommended merit increase to reflect what we want. Managing the employee’s performance rating will calculate a new salary for the employee.

Having arrived at a new salary, we can, if we wish, make an adjustment to the recommended bonus. The Bonus percentage is looked up in a table based on the employee’s performance and what grade level they are. The bonus percentage is a corporate guideline. As with the merit increase, we can adjust the recommended bonus if we wish, which will result in the calculation of a new salary with bonus. Our final decision involves equity. The user may grant employees stock options, restricted share units or other compensation.

After you have made all four of these decisions, the *Blueprint* has all the information it needs to go forward and calculate the monthly salary, benefits and headcount for you. You can plan at the individual employee level or for all employees at one time. Planning at the total department level enables managers to target specific corporate guidelines in areas such as merit compensation or department bonuses.

For example, the following screen capture shows that by terminating Dawn Sarginson, we have affected her merit increase and recommended bonus. The changes caused by our actions are flowing through to this tab and are highlighted in **blue**.

| Rows | FTE | Salary | Base Salary | % of Midpoint | Previous Rating | Performance | Merit Target % | Rec. Merit Increase | Merit Adjustment \$ | Merit Adjustment % | New Salary | Bonus Target % | Rec. Bonus |
|---------------------|-----|---------|-------------|---------------|-----------------|-------------|----------------|---------------------|---------------------|--------------------|------------|----------------|------------|
| Total Company | 7 | 252,668 | 252,668 | 703.42% | | | 2.63% | 6,648 | 0 | 2.63% | 259,316 | 13.65% | 35,407 |
| Total Operations | 7 | 252,668 | 252,668 | 703.42% | | | 2.63% | 6,648 | 0 | 2.63% | 259,316 | 13.65% | 35,407 |
| US Operations | 7 | 252,668 | 252,668 | 703.42% | | | 2.63% | 6,648 | 0 | 2.63% | 259,316 | 13.65% | 35,407 |
| US Procurement | 7 | 252,668 | 252,668 | 703.42% | | | 2.63% | 6,648 | 0 | 2.63% | 259,316 | 13.65% | 35,407 |
| Naton, Anne | 1 | 37,656 | 37,656 | 100.42% | High | High | 5.00% | 1,098 | 0 | 2.92% | 38,754 | 22.00% | 8,526 |
| Owens, Julie A | 1 | 43,310 | 43,310 | 100.43% | High | Star | 7.50% | 2,436 | 0 | 5.63% | 45,746 | 32.50% | 14,867 |
| Post, Karon K | 1 | 50,817 | 50,817 | 100.38% | Medium | Low | 1.00% | 466 | 0 | .92% | 51,283 | .00% | 0 |
| Sarginson, Dawn R | 1 | 38,557 | 38,557 | 100.41% | Low | Low | 1.00% | 321 | 0 | .83% | 38,878 | .00% | 0 |
| Shepherd, Kelly Ann | 1 | 25,360 | 25,360 | 100.63% | Medium | Low | 1.00% | 42 | 0 | .17% | 25,402 | .00% | 0 |
| Smith, Heather M | 1 | 32,658 | 32,658 | 100.49% | Star | Star | 7.50% | 2,041 | 0 | 6.25% | 34,699 | 32.50% | 11,277 |
| Spencer, Cecilia | 1 | 24,310 | 24,310 | 100.66% | High | Medium | 3.00% | 243 | 0 | 1.00% | 24,554 | 3.00% | 737 |

The following screenshot shows a change in the bonus adjustment dollars for my department from 17,200 to 22,000 dollars. Making the change causes the dollar amount to break back proportionally over those persons receiving bonuses.

| Rows | Merit Target % | Rec. Merit Increase | Merit Adjustment \$ | Merit Adjustment % | New Salary | Bonus Target % | Rec. Bonus | Bonus Adjustment \$ | Bonus Adjustment % | New Salary w/Bonus | Stop Date |
|---------------------|----------------|---------------------|---------------------|--------------------|------------|----------------|------------|---------------------|--------------------|--------------------|-----------|
| Total Company | 2.63% | 6,648 | 0 | 2.63% | 259,316 | 13.65% | 35,407 | 22,000 | 22.14% | 316,723 | 1 |
| Total Operations | 2.63% | 6,648 | 0 | 2.63% | 259,316 | 13.65% | 35,407 | 22,000 | 22.14% | 316,723 | 1 |
| US Operations | 2.63% | 6,648 | 0 | 2.63% | 259,316 | 13.65% | 35,407 | 22,000 | 22.14% | 316,723 | 1 |
| US Procurement | 2.63% | 6,648 | 0 | 2.63% | 259,316 | 13.65% | 35,407 | 22,000 | 22.14% | 316,723 | 1 |
| Naton, Anne | 5.00% | 1,098 | 0 | 2.92% | 38,754 | 22.00% | 8,526 | 5,116 | 35.20% | 52,397 | |
| Owens, Julie A | 7.50% | 2,436 | 0 | 5.63% | 45,746 | 32.50% | 14,867 | 5,372 | 44.24% | 65,985 | |
| Post, Karon K | 1.00% | 466 | 0 | .92% | 51,283 | .00% | 0 | 0 | .00% | 51,283 | |
| Sarginson, Dawn R | 1.00% | 321 | 0 | .83% | 38,878 | .00% | 0 | 0 | .00% | 38,878 | |
| Shepherd, Kelly Ann | 1.00% | 42 | 0 | .17% | 25,402 | .00% | 0 | 0 | .00% | 25,402 | |
| Smith, Heather M | 7.50% | 2,041 | 0 | 6.25% | 34,699 | 32.50% | 11,277 | 5,116 | 47.24% | 51,092 | |
| Spencer, Cecilia | 3.00% | 243 | 0 | 1.00% | 24,554 | 3.00% | 737 | 6,395 | 29.05% | 31,686 | |

Existing Employee Salary Calc

In the previous three tabs, we have made all the decisions necessary for calculating the salaries, benefits and government impositions for the existing employees in this department. **ExistingEmployeeSalaryCalc**, the fourth tab, calculates, by employee by month, the results of our choices. In the following screen capture, you can see the salary, taxes and benefits being calculated for Anne Nation.

| Employee Information Input - Existing Headcount Input - Compensation Planning ExistingEmployeeSalaryCalc Input - New Headcount NewEmployeeSalaryCalc Headcount Comp Summary | | | | | | | | | | | | | |
|--|--|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|-----------------|
| CorporateGuidelineSummary BenefitAssumptions BonusPlans CorporateGuidelines Differential GradeLevelBy Position MidpointPerformance RecommendedMidSalary | | | | | | | | | | | | | |
| Rows: SalaryCalc [SalaryCalc] | Columns: Months [Months] | | | | | | | | | | | | |
| | Context: US Procurement [Organization] Nation, Anne [ExistingEmployee] | | | | | | | | | | | | |
| | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Total Year |
| Base Salary | 37,656 | 37,656 | 37,656 | 37,656 | 37,656 | 37,656 | 37,656 | 37,656 | 37,656 | 37,656 | 37,656 | 37,656 | 37,656 |
| Action | | | | | | | | | | | | | |
| Bonus | 1,137 | 1,137 | 1,137 | 1,137 | 1,137 | 1,137 | 1,137 | 1,137 | 1,137 | 1,137 | 1,137 | 1,137 | 13,642 |
| Total Salary | 4,275 | 4,275 | 4,275 | 4,275 | 4,275 | 4,275 | 4,275 | 4,275 | 4,275 | 4,275 | 4,275 | 4,275 | 51,939 |
| Govt Taxes | 425.35 | 412.95 | 391.15 | 391.15 | 391.15 | 399.52 | 337.92 | 334.03 | 334.03 | 334.03 | 334.03 | 334.03 | 4,419.34 |
| Social Security | 265.04 | 265.04 | 265.04 | 265.04 | 265.04 | 270.72 | 270.72 | 270.72 | 270.72 | 270.72 | 270.72 | 270.72 | 3,220.22 |
| Medicare | 61.99 | 61.99 | 61.99 | 61.99 | 61.99 | 63.31 | 63.31 | 63.31 | 63.31 | 63.31 | 63.31 | 63.31 | 753.12 |
| SUI | 64.12 | 64.12 | 64.12 | 64.12 | 64.12 | 65.50 | 3.89 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 390.00 |
| FUTA | 34.20 | 21.80 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 56.00 |
| Other Benefits | 1,154.21 | 1,154.21 | 1,154.21 | 1,154.21 | 1,154.21 | 1,178.93 | 1,178.93 | 1,178.93 | 1,178.93 | 1,178.93 | 1,178.93 | 1,178.93 | 14,023.55 |
| Health Plan Expense | 150 | 150 | 150 | 150 | 150 | 150 | 150 | 150 | 150 | 150 | 150 | 150 | 1,800 |

Karon Post, if you remember, was terminated with severance in March, which is reflected in the next screen capture.

| Rows: SalaryCalc [SalaryCalc] | Columns: Months [Months] | | | | | | | | | | | | |
|-------------------------------|---|---------------|------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-----------------|
| | Context: US Procurement [Organization] Post, Karon K [ExistingEmployee] | | | | | | | | | | | | |
| | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Total Year |
| Base Salary | 50,817 | 50,817 | 50,817 | 50,817 | 50,817 | 50,817 | 50,817 | 50,817 | 50,817 | 50,817 | 50,817 | 50,817 | 50,817 |
| Action | | | Term w/Severance | | | | | | | | | | |
| Severance | 0 | 0 | 5,000 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 5,000 |
| Total Salary | 4,235 | 4,274 | 5,000 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 13,508 |
| Govt Taxes | 421.36 | 413.15 | 457.50 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1,292.01 |
| Social Security | 262.55 | 264.96 | 310.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 837.52 |
| Medicare | 61.40 | 61.97 | 72.50 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 195.87 |
| SUI | 63.52 | 64.10 | 75.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 202.62 |
| FUTA | 33.88 | 22.12 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 56.00 |
| Other Benefits | 1,143.38 | 1,153.86 | 1,350.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 3,647.25 |
| Health Plan Expense | 325 | 325 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 650 |

Dawn Sarginson retired in February.

| Rows: SalaryCalc [SalaryCalc] | Columns: Months [Months] | | | | | | | | | | | | |
|-------------------------------|---|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|---------------|
| | Context: US Procurement [Organization] Sarginson, Dawn R [ExistingEmployee] | | | | | | | | | | | | |
| | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Total Year |
| Base Salary | 38,557 | 38,557 | 38,557 | 38,557 | 38,557 | 38,557 | 38,557 | 38,557 | 38,557 | 38,557 | 38,557 | 38,557 | 38,557 |
| Action | | Retirement | | | | | | | | | | | |
| Total Salary | 3,213 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 3,213 |
| Govt Taxes | 319.70 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 319.70 |
| Social Security | 199.21 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 199.21 |
| Medicare | 46.59 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 46.59 |
| SUI | 48.20 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 48.20 |
| FUTA | 25.70 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 25.70 |
| Other Benefits | 867.53 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 867.53 |

You will notice that in all these screen captures that the government impositions are all U.S.-based. This is because we are looking at a U.S. department, specifically, U.S. Procurement. If we were to look at departments in other countries, we would see the corresponding government impositions for those countries being calculated as shown in these examples:

- Australia

| Rows: | Columns: | Context: | | | | | | | | | | | |
|---|-------------------------------------|--|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|------------|
| <div>SalaryCalc</div> <div>SalaryCalc</div> | <div>Months</div> <div>Months</div> | <div>Australia Procurement</div> <div>Organization</div> <div>Patrick Mills</div> <div>ExistingEmployees</div> | | | | | | | | | | | |
| | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Total Year |
| Base Salary | 45,942 | 45,942 | 45,942 | 45,942 | 45,942 | 45,942 | 45,942 | 45,942 | 45,942 | 45,942 | 45,942 | 45,942 | 45,942 |
| Action | | | | | | | | | | | | | |
| Bonus | 2,277 | 2,277 | 2,277 | 2,277 | 2,277 | 2,277 | 2,277 | 0 | 0 | 0 | 0 | 0 | 13,662 |
| Severance | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1,000 | 0 | 0 | 0 | 0 | 1,000 |
| Total Salary | 6,106 | 6,106 | 6,106 | 6,316 | 6,316 | 6,316 | 6,316 | 1,000 | 0 | 0 | 0 | 0 | 38,264 |
| Govt Taxes | 223.72 | 1,139.55 | 2,055.37 | 3,009.90 | 3,957.26 | 5,244.19 | 5,363.19 | 5,329.14 | 5,329.14 | 5,329.14 | 5,329.14 | 5,329.14 | 47,638.86 |
| Superannuation Guarantee (GS) | 116.31 | 116.31 | 116.31 | 120.32 | 120.32 | 120.32 | 19.05 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 728.93 |
| AUS Income Tax | 15.83 | 931.65 | 1,847.48 | 2,794.84 | 3,742.21 | 5,029.14 | 5,329.14 | 5,329.14 | 5,329.14 | 5,329.14 | 5,329.14 | 5,329.14 | 46,335.97 |
| AUS Medical Levy | 91.58 | 91.58 | 91.58 | 94.74 | 94.74 | 94.74 | 15.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 573.96 |
| Other Benefits | 1,648.49 | 1,648.49 | 1,648.49 | 1,705.25 | 1,705.25 | 1,705.25 | 270.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 18,331.22 |
| Health Plan Expense | 150 | 150 | 150 | 150 | 150 | 150 | 150 | 0 | 0 | 0 | 0 | 0 | 900 |

- Japan

| Rows: | Columns: | | | | | | | | | | | | Context: | | |
|----------------------------|--------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|---|--|--|
| SalaryCalc (SalaryCalc) | Months (Months) | | | | | | | | | | | | Japan Manufacturing Control (Organization) | | Yoshihisa Naruse (ExistingEmployee) |
| | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Total Year | | |
| Base Salary | 3,571,351 | 3,571,351 | 3,571,351 | 3,571,351 | 3,571,351 | 3,571,351 | 3,571,351 | 3,571,351 | 3,571,351 | 3,571,351 | 3,571,351 | 3,571,351 | 3,571,351 | | |
| Bonus | 24,108 | 24,108 | 24,108 | 24,108 | 24,108 | 24,108 | 24,108 | 24,108 | 24,108 | 24,108 | 24,108 | 24,108 | 289,301 | | |
| Total Salary | 321,721 | 321,721 | 321,721 | 321,721 | 321,721 | 321,721 | 321,721 | 321,721 | 321,721 | 325,203 | 325,203 | 325,203 | 3,871,098 | | |
| Govt Taxes | 4,825.81 | 4,825.81 | 4,825.81 | 4,825.81 | 4,825.81 | 4,825.81 | 4,825.81 | 4,825.81 | 4,825.81 | 4,878.05 | 4,878.05 | 4,878.05 | 58,066.46 | | |
| Japan Social Security | 4,825.81 | 4,825.81 | 4,825.81 | 4,825.81 | 4,825.81 | 4,825.81 | 4,825.81 | 4,825.81 | 4,825.81 | 4,878.05 | 4,878.05 | 4,878.05 | 58,066.46 | | |
| Other Benefits | 86,864.66 | 86,864.66 | 86,864.66 | 86,864.66 | 86,864.66 | 86,864.66 | 86,864.66 | 86,864.66 | 86,864.66 | 87,804.82 | 87,804.82 | 87,804.82 | 1,045,196.37 | | |
| Health Plan Expense | 325 | 325 | 325 | 325 | 325 | 325 | 325 | 325 | 325 | 325 | 325 | 325 | 3,900 | | |

- United Kingdom

| | | | | | | | | | | | | | | | |
|--------------------------|--|------------------|----------|--------------------------------|----------|----------|----------|----------|----------|----------|----------|----------|----------|-------------------------------------|------------|
| Rows: | | Columns: | | Context: | | | | | | | | | | | |
| SalaryCalc SalaryCalc | | Months Months | | UK Procurement Organization | | | | | | | | | | Amphlett, Edger ExistingEmployee | |
| | | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | # | Total Year |
| Base Salary | | 42,994 | 42,994 | 42,994 | 42,994 | 42,994 | 42,994 | 42,994 | 42,994 | 42,994 | 42,994 | 42,994 | 42,994 | | 42,994 |
| Bonus | | 287 | 287 | 287 | 287 | 287 | 287 | 287 | 287 | 287 | 287 | 287 | 287 | | 3,448 |
| Total Salary | | 3,870 | 3,870 | 3,870 | 3,870 | 3,870 | 3,870 | 3,870 | 3,870 | 3,870 | 3,870 | 3,870 | 3,879 | | 46,452 |
| Govt Taxes | | 444.95 | 444.95 | 444.95 | 444.95 | 444.95 | 444.95 | 444.95 | 444.95 | 444.95 | 444.95 | 444.95 | 446.10 | | 5,340.59 |
| National Insurance | | 445 | 445 | 445 | 445 | 445 | 445 | 445 | 445 | 445 | 445 | 445 | 446 | | 5,341 |
| Other Benefits | | 1,044.96 | 1,044.96 | 1,044.96 | 1,044.96 | 1,044.96 | 1,044.96 | 1,044.96 | 1,044.96 | 1,044.96 | 1,044.96 | 1,044.96 | 1,047.38 | | 12,541.92 |

- Germany

| | | | | | | | | | | | | | | | | | | | | | | | | |
|----------------------------|--------------------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|---|--|--|--|--|--|--|--|--|--|--|--|
| Rows: | Columns: | | | | | | | | | | | | Context: | | | | | | | | | | | |
| SalaryCalc [SalaryCalc] | Months [Months] | | | | | | | | | | | | Germany Patent Protection/PP [Organization] Strader, Sherman [ExistingEmployees] | | | | | | | | | | | |
| | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Total Year | | | | | | | | | | | |
| Base Salary | 43,969 | 43,969 | 43,969 | 43,969 | 43,969 | 43,969 | 43,969 | 43,969 | 43,969 | 43,969 | 43,969 | 43,969 | 43,969 | | | | | | | | | | | |
| Bonus | 760 | 760 | 760 | 760 | 760 | 760 | 760 | 760 | 760 | 760 | 760 | 760 | 9,123 | | | | | | | | | | | |
| Total Salary | 4,424 | 4,424 | 4,424 | 4,562 | 4,562 | 4,562 | 4,562 | 4,562 | 4,562 | 4,562 | 4,562 | 4,562 | 54,329 | | | | | | | | | | | |
| Govt Taxes | 928.11 | 928.11 | 928.11 | 957.97 | 957.97 | 957.97 | 957.97 | 957.97 | 957.97 | 957.97 | 957.97 | 957.97 | 11,409.04 | | | | | | | | | | | |
| German Social Security | 928.11 | 928.11 | 928.11 | 957.97 | 957.97 | 957.97 | 957.97 | 957.97 | 957.97 | 957.97 | 957.97 | 957.97 | 11,409.04 | | | | | | | | | | | |
| Other Benefits | 1,194.57 | 1,194.57 | 1,194.57 | 1,231.67 | 1,231.67 | 1,231.67 | 1,231.67 | 1,231.67 | 1,231.67 | 1,231.67 | 1,231.67 | 1,231.67 | 14,668.77 | | | | | | | | | | | |
| Health Plan Expense | 150 | 150 | 150 | 150 | 150 | 150 | 150 | 150 | 150 | 150 | 150 | 150 | 1,800 | | | | | | | | | | | |

The tab may also be re-orientated to a department – employee – salary calc view.
In the following example, you can see the calculations for some French employees in the France Manufacturing Control Department. Note the France-specific government impositions.

| Rows: | | Columns: | | | | | Context: | | | | | |
|---|---|-----------------------------------|-----------|-----------|-----------|-----------|---|-----------|-----------|-----------|-----------|-----------|
| Existing Employees <small>(Existing Employees)</small> | | Months <small>(Months)</small> | | | | | France Manufacturing Control <small>(Organization)</small> | | | | | |
| | | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov |
| France Manufacturing Control | Base Salary | 897,925 | 897,925 | 897,925 | 897,925 | 897,925 | 897,925 | 897,925 | 897,925 | 897,925 | 897,925 | 897,925 |
| | Bonus | 13,399 | 13,399 | 13,399 | 13,399 | 13,399 | 13,399 | 13,399 | 13,399 | 13,399 | 13,399 | 13,399 |
| | Total Salary | 88,352 | 88,352 | 88,352 | 88,352 | 88,352 | 88,352 | 88,352 | 88,352 | 88,352 | 88,352 | 88,352 |
| | Govt Taxes | 7,068.14 | 7,068.14 | 7,068.14 | 7,068.14 | 7,068.14 | 7,068.14 | 7,068.14 | 7,068.14 | 7,087.37 | 7,087.37 | 7,101.14 |
| | CSG (general social contribution) | 6,626.38 | 6,626.38 | 6,626.38 | 6,626.38 | 6,626.38 | 6,626.38 | 6,626.38 | 6,626.38 | 6,644.41 | 6,644.41 | 6,657.14 |
| | CRDS (repayment of the debt of social security) | 441.76 | 441.76 | 441.76 | 441.76 | 441.76 | 441.76 | 441.76 | 441.76 | 442.96 | 442.96 | 443.00 |
| | Other Benefits | 23,854.96 | 23,854.96 | 23,854.96 | 23,854.96 | 23,854.96 | 23,854.96 | 23,854.96 | 23,854.96 | 23,919.89 | 23,919.89 | 23,968.00 |
| | Health Plan Expense | 775 | 775 | 775 | 775 | 775 | 775 | 775 | 775 | 775 | 775 | 775 |
| | Base Salary | 173,160 | 173,160 | 173,160 | 173,160 | 173,160 | 173,160 | 173,160 | 173,160 | 173,160 | 173,160 | 173,160 |
| | Bonus | 3,228 | 3,228 | 3,228 | 3,228 | 3,228 | 3,228 | 3,228 | 3,228 | 3,228 | 3,228 | 3,228 |
| Malia Metella | Total Salary | 17,657 | 17,657 | 17,657 | 17,657 | 17,657 | 17,657 | 17,657 | 17,657 | 17,898 | 17,898 | 17,898 |
| | Govt Taxes | 1,412.60 | 1,412.60 | 1,412.60 | 1,412.60 | 1,412.60 | 1,412.60 | 1,412.60 | 1,412.60 | 1,431.84 | 1,431.84 | 1,431.84 |
| | CSG (general social contribution) | 1,324.31 | 1,324.31 | 1,324.31 | 1,324.31 | 1,324.31 | 1,324.31 | 1,324.31 | 1,324.31 | 1,342.35 | 1,342.35 | 1,342.35 |
| | CRDS (repayment of the debt of social security) | 88.29 | 88.29 | 88.29 | 88.29 | 88.29 | 88.29 | 88.29 | 88.29 | 89.49 | 89.49 | 89.49 |
| | Other Benefits | 4,767.51 | 4,767.51 | 4,767.51 | 4,767.51 | 4,767.51 | 4,767.51 | 4,767.51 | 4,767.51 | 4,832.45 | 4,832.45 | 4,832.45 |
| | Health Plan Expense | 150 | 150 | 150 | 150 | 150 | 150 | 150 | 150 | 150 | 150 | 150 |
| | Base Salary | 199,025 | 199,025 | 199,025 | 199,025 | 199,025 | 199,025 | 199,025 | 199,025 | 199,025 | 199,025 | 199,025 |
| | Bonus | 5,424 | 5,424 | 5,424 | 5,424 | 5,424 | 5,424 | 5,424 | 5,424 | 5,424 | 5,424 | 5,424 |
| | Total Salary | 22,009 | 22,009 | 22,009 | 22,009 | 22,009 | 22,009 | 22,009 | 22,009 | 22,009 | 22,009 | 22,009 |
| | Govt Taxes | 1,760.75 | 1,760.75 | 1,760.75 | 1,760.75 | 1,760.75 | 1,760.75 | 1,760.75 | 1,760.75 | 1,760.75 | 1,760.75 | 1,760.75 |
| Manuel Reynaert | CSG (general social contribution) | 1,650.70 | 1,650.70 | 1,650.70 | 1,650.70 | 1,650.70 | 1,650.70 | 1,650.70 | 1,650.70 | 1,650.70 | 1,650.70 | 1,650.70 |
| | CRDS (repayment of the debt of social security) | 110.05 | 110.05 | 110.05 | 110.05 | 110.05 | 110.05 | 110.05 | 110.05 | 110.05 | 110.05 | 110.05 |
| | Other Benefits | 5,942.52 | 5,942.52 | 5,942.52 | 5,942.52 | 5,942.52 | 5,942.52 | 5,942.52 | 5,942.52 | 5,942.52 | 5,942.52 | 5,942.52 |
| | Base Salary | 202,480 | 202,480 | 202,480 | 202,480 | 202,480 | 202,480 | 202,480 | 202,480 | 202,480 | 202,480 | 202,480 |
| | Total Salary | 16,873 | 16,873 | 16,873 | 16,873 | 16,873 | 16,873 | 16,873 | 16,873 | 16,873 | 16,873 | 16,873 |
| | Govt Taxes | 1,349.87 | 1,349.87 | 1,349.87 | 1,349.87 | 1,349.87 | 1,349.87 | 1,349.87 | 1,349.87 | 1,349.87 | 1,349.87 | 1,349.87 |
| | CSG (general social contribution) | 1,265.50 | 1,265.50 | 1,265.50 | 1,265.50 | 1,265.50 | 1,265.50 | 1,265.50 | 1,265.50 | 1,265.50 | 1,265.50 | 1,265.50 |
| | CRDS (repayment of the debt of social security) | 84.37 | 84.37 | 84.37 | 84.37 | 84.37 | 84.37 | 84.37 | 84.37 | 84.37 | 84.37 | 84.37 |
| | Other Benefits | 4,555.80 | 4,555.80 | 4,555.80 | 4,555.80 | 4,555.80 | 4,555.80 | 4,555.80 | 4,555.80 | 4,555.80 | 4,555.80 | 4,555.80 |
| | Health Plan Expense | 325 | 325 | 325 | 325 | 325 | 325 | 325 | 325 | 325 | 325 | 325 |
| Manuela Montebrun | Base Salary | 173,147 | 173,147 | 173,147 | 173,147 | 173,147 | 173,147 | 173,147 | 173,147 | 173,147 | 173,147 | 173,147 |
| | Bonus | 4,748 | 4,748 | 4,748 | 4,748 | 4,748 | 4,748 | 4,748 | 4,748 | 4,748 | 4,748 | 4,748 |
| | Total Salary | 19,177 | 19,177 | 19,177 | 19,177 | 19,177 | 19,177 | 19,177 | 19,177 | 19,177 | 19,177 | 19,177 |
| | | | | | | | | | | | | |

It is not necessary to display this tab. We have included it here as a courtesy for informational purposes. An administrator of the TM1 Contributor application could make the determination to hide this tab and allow the user to see the consolidated results in the Headcount Comp Summary tab.

The Salaries, Bonus and Severance lines are calculated by entries in the previous tabs. The Benefits lines are calculated as a standard rate per active employee. Government impositions are calculated employee-by-employee using the appropriate rates and taxable caps. Headcount can be a driver for additional expense line items.

All information is calculated in the local currency. This *Blueprint* can feed the *Expense Planning and Control Blueprint Powered by TM1*, which would convert the information from the local currency to the chosen corporate standard.

Input New Headcount

Having completed our modeling for our existing employees, we can make decisions regarding new hires. This tab allows 20 new hires per department. This number can be increased or decreased based on company need. Planning is by position, dropdown boxes are provided to assist in the decision-making process.

| | FTE | Position | Location | Health Plan | Warnings | Bonus Amount | Start Month | Differential % | Target Base | Market Adjustment | Hiring Salary | Bonus M |
|----------------------------|----------|--------------------------|-----------------|-----------------|----------|--------------|-------------|----------------|----------------|-------------------|----------------|---------|
| Total New Employees | 7 | | | | | 0 | | % | 251,500 | 0 | 251,500 | |
| 1 | FT | 1 Senior Buyer | Minneapolis, MN | Individual Plan | | 1,750 | Jun | 100% | 37,500 | 0 | 37,500 | Dec |
| 2 | FT | 1 Senior Buyer | Chicago, IL | | | 2,588 | Apr | 115% | 43,125 | 0 | 43,125 | Oct |
| 3 | FT | 1 Purchase & Sales Coord | New York, NY | Family Plan | | 3,713 | Feb | 133% | 50,625 | 0 | 50,625 | Aug |
| 4 | FT | 1 Accounting Mgr | Boston, MA | Individual Plan | | 2,880 | Mar | 80% | 38,400 | 0 | 38,400 | Sep |
| 5 | FT | 1 Order Clerk | Los Angeles, CA | Individual Plan | | 126 | Nov | 120% | 25,200 | 0 | 25,200 | |
| 6 | FT | 1 Advisory Serv Spec | Minneapolis, MN | Individual + 1 | | 1,896 | Mar | 100% | 32,500 | 0 | 32,500 | Sep |
| 7 | FT | 1 Order Clerk | Chicago, IL | | | 242 | Sep | 115% | 24,150 | 0 | 24,150 | |
| 8 | 0 | | | | | 0 | | % | 0 | 0 | 0 | |
| 9 | 0 | | | | | 0 | | % | 0 | 0 | 0 | |
| 10 | 0 | | | | | 0 | | % | 0 | 0 | 0 | |
| 11 | 0 | | | | | 0 | | % | 0 | 0 | 0 | |
| 12 | 0 | | | | | 0 | | % | 0 | 0 | 0 | |
| 13 | 0 | | | | | 0 | | % | 0 | 0 | 0 | |
| 14 | 0 | | | | | 0 | | % | 0 | 0 | 0 | |
| 15 | 0 | | | | | 0 | | % | 0 | 0 | 0 | |
| 16 | 0 | | | | | 0 | | % | 0 | 0 | 0 | |
| 17 | 0 | | | | | 0 | | % | 0 | 0 | 0 | |
| 18 | 0 | | | | | 0 | | % | 0 | 0 | 0 | |
| 19 | 0 | | | | | 0 | | % | 0 | 0 | 0 | |
| 20 | 0 | | | | | 0 | | % | 0 | 0 | 0 | |

To hire a new employee:

1. A selection is made from a list of pre-approved positions,
2. The employee's FTE is chosen and then the FT/PT field is instantly calculated,
3. A location where this employee will be working is picked from a list you tailor.
4. The new employee is assigned to a Health Plan Choice if known.
5. A start month is selected.

The *Blueprint* calculates a differential to be paid based on where the employee will be located. Minneapolis is our baseline, so a location of Minneapolis would pay 100% of the recommended midpoint for this position. Someone working in New York, as you can see, would get a differential equal to 135% of the midpoint, while someone working in Sioux Falls, South Dakota would get 85% of the midpoint. The midpoints also have exchange rates built into them so that a position in Narita Japan, being paid in Yen instead of dollars would have a very large differential associated with it. Differentials are described later in this document

Each position has an associated salary grade. It is the combination of salary grade and location choice that causes the target base to be populated. The user can make a marketing adjustment to the target base to arrive at a hiring salary. The Bonus percentage is arrived at using business rules embedded in the model. Based on the grade, and assuming all first year employees perform at mid level, a lookup table brings up a bonus. Our model pays a bonus to employees who serve at least six months in the calendar year. These rules are assumptions made in the existing *Blueprint*. It is very easy to modify a *Blueprint* to reflect your own set of headcount and payroll assumptions.

This tab is form-based so that you can prepare a plan based on the decisions you would make to manage their employees, rather than burdening you with the month-by-month calculations of cost and headcount. This makes workforce planning easy for department managers, while providing visibility for corporate into the decisions that make up changes to the workforce, rather than just receiving the change in dollars spent in a department.

New Employee Salary Calc

The sixth tab in the *Blueprint* is **NewEmployeeSalaryCalc**. It requires no input and in this case is based entirely on information entered into **Input – New Headcount** and the assumptions and rules built into the model. This tab is displayed for the convenience of the user and can be hidden in a deployed model by an administrator.

| Row: | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Total Year |
|---------------------|--------------|--------------|--------------|--------------|--------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|-----------------|
| Base Salary | 37,500 | 37,500 | 37,500 | 37,500 | 37,500 | 37,500 | 37,500 | 37,500 | 37,500 | 37,500 | 37,500 | 37,500 | 37,500 |
| Bonus | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1,750 | 1,750 |
| Total Salary | 0 | 0 | 0 | 0 | 0 | 3,125 | 3,125 | 3,125 | 3,125 | 3,125 | 3,125 | 4,875 | 23,625 |
| Headcount Status | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.00 | 1.00 | 1.00 | 1.00 | 1.00 | 1.00 | 1.00 | 1.00 |
| Govt Taxes | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 310.94 | 310.94 | 291.94 | 285.94 | 285.94 | 285.94 | 446.06 | 2,217.69 |
| Social Security | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 193.75 | 193.75 | 193.75 | 193.75 | 193.75 | 193.75 | 302.25 | 1,464.75 |
| Medicare | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 45.31 | 45.31 | 45.31 | 45.31 | 45.31 | 45.31 | 70.69 | 342.56 |
| SUI | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 46.88 | 46.88 | 46.88 | 46.88 | 46.88 | 46.88 | 73.13 | 354.38 |
| FUTA | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 25.00 | 25.00 | 6.00 | 0.00 | 0.00 | 0.00 | 0.00 | 56.00 |
| Other Benefits | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 843.75 | 843.75 | 843.75 | 843.75 | 843.75 | 843.75 | 1,316.25 | 6,378.75 |
| Health Plan Expense | 0 | 0 | 0 | 0 | 0 | 150 | 150 | 150 | 150 | 150 | 150 | 150 | 1,050 |
| Position | Senior Buyer | Senior Buyer | Senior Buyer | Senior Buyer | Senior Buyer | Senior Buyer | Senior Buyer | Senior Buyer | Senior Buyer | Senior Buyer | Senior Buyer | Senior Buyer | Senior Buyer |

In the previous section, our first hire was for a Senior Buyer that we wanted to start in June at a target base of 37,500 with a 1,750 bonus payable in December. In the screen capture here you can view the results for those choices. As with existing employees, the appropriate government impositions are charged based on location.

Headcount Comp Summary

The seventh tab is **HeadcountCompSummary**. It displays the results based on the choices made by a user. There are a number of expandable calculations. A user may also view quarterly results if desired. This functionality is available for all tabs calculated by month. This view gives the contributor a consolidated view of Existing Employees, New Employees and all employees within the department.

Workforce Planning V2 | Work InProgress | US Procurement [3] - Microsoft Internet Explorer

EmployeeInformation

Input - Existing Headcount

Input - Compensation Planning

ExistingEmployeeSalaryCalc

Input - New Headcount

NewEmployeeSalaryCalc

Headcount Comp Summary

CorporateGuidelineSummary

BenefitAssumptions

BonusPlans

CorporateGuidelines

Differential

GradeLevelBy Position

MidpointPerformance

RecommendedMidSalary

Rowset:

EmployeeSummary
[EmployeeSummary]

HC_CompSummary
[HC_CompSummary]

Columns:

Months
[Months]

Context:

US Procurement
[Organization]

| | | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Total Year |
|--------------------|--|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|------------|
| Existing Employees | Salary | 21,056 | 17,843 | 13,608 | 13,608 | 13,608 | 13,608 | 13,608 | 13,608 | 13,608 | 13,608 | 13,608 | 13,608 | 174,976 |
| | Merit | 0 | 39 | 170 | 373 | 373 | 465 | 465 | 465 | 485 | 485 | 488 | 488 | 4,296 |
| | Merit% | .00% | .22% | 1.25% | 2.74% | 2.74% | 3.41% | 3.41% | 3.41% | 3.56% | 3.56% | 3.59% | 3.59% | 2.45% |
| | Total Salary | 21,056 | 17,881 | 13,778 | 13,981 | 13,981 | 14,072 | 14,072 | 14,072 | 14,093 | 14,093 | 14,096 | 14,096 | 179,272 |
| | Salary | 21,056 | 17,843 | 13,608 | 13,608 | 13,608 | 13,608 | 13,608 | 13,608 | 13,608 | 13,608 | 13,608 | 13,608 | 174,976 |
| | Merit | 0 | 39 | 170 | 373 | 373 | 465 | 465 | 465 | 485 | 485 | 488 | 488 | 4,296 |
| | Severance | 0 | 0 | 5,000 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 5,000 |
| | Total Employee Comp (less Equity) | 25,840 | 22,665 | 23,562 | 18,765 | 18,765 | 18,856 | 18,856 | 18,856 | 18,877 | 18,877 | 18,880 | 18,880 | 241,679 |
| | Total Employee Comp (Including Equity) | 25,840 | 22,665 | 23,562 | 18,765 | 18,765 | 18,856 | 18,856 | 18,856 | 18,877 | 18,877 | 18,880 | 18,880 | 241,679 |
| | Total Employee Comp (less Equity) | 25,840 | 22,665 | 23,562 | 18,765 | 18,765 | 18,856 | 18,856 | 18,856 | 18,877 | 18,877 | 18,880 | 18,880 | 241,679 |
| New Employee | Headcount | 7.00 | 6.00 | 5.00 | 5.00 | 5.00 | 5.00 | 5.00 | 5.00 | 5.00 | 5.00 | 5.00 | 5.00 | 7.00 |
| | Bonus % | 22.72% | 26.75% | 34.72% | 34.22% | 34.22% | 34.00% | 34.00% | 34.00% | 33.95% | 33.95% | 33.94% | 33.94% | 32.02% |
| | Salary | 0 | 4,219 | 10,127 | 13,721 | 13,721 | 16,846 | 16,846 | 16,846 | 18,858 | 18,858 | 20,958 | 20,958 | 171,958 |
| | Merit | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| | Total Salary | 0 | 4,219 | 10,127 | 13,721 | 13,721 | 16,846 | 16,846 | 16,846 | 18,858 | 18,858 | 20,958 | 20,958 | 171,958 |
| | Salary | 0 | 4,219 | 10,127 | 13,721 | 13,721 | 16,846 | 16,846 | 16,846 | 18,858 | 18,858 | 20,958 | 20,958 | 171,958 |
| | Merit | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| | Total Employee Comp (less Equity) | 0 | 4,219 | 10,127 | 13,721 | 13,721 | 16,846 | 16,846 | 17,588 | 20,795 | 21,657 | 23,757 | 25,507 | 184,784 |
| | Total Employee Comp (Including Equity) | 0 | 4,219 | 10,127 | 13,721 | 13,721 | 16,846 | 16,846 | 17,588 | 20,795 | 21,657 | 23,757 | 25,507 | 184,784 |
| | Total Employee Comp (less Equity) | 0 | 4,219 | 10,127 | 13,721 | 13,721 | 16,846 | 16,846 | 17,588 | 20,795 | 21,657 | 23,757 | 25,507 | 184,784 |
| Total Employees | Headcount | 0.00 | 1.00 | 3.00 | 4.00 | 4.00 | 5.00 | 5.00 | 5.00 | 6.00 | 6.00 | 7.00 | 7.00 | 7.00 |
| | Bonus % | .00% | .00% | .00% | .00% | .00% | .00% | .00% | 4.41% | 10.27% | 14.84% | 13.35% | 21.70% | 7.46% |
| | Salary | 21,056 | 22,061 | 23,735 | 27,329 | 27,329 | 30,454 | 30,454 | 30,454 | 32,466 | 32,466 | 34,566 | 34,566 | 346,934 |
| | Merit | 0 | 39 | 170 | 373 | 373 | 465 | 465 | 465 | 485 | 485 | 488 | 488 | 4,296 |
| | Merit% | .00% | .18% | .72% | 1.37% | 1.37% | 1.53% | 1.53% | 1.53% | 1.49% | 1.49% | 1.41% | 1.41% | 1.24% |
| | Total Salary | 21,056 | 22,100 | 23,905 | 27,702 | 27,702 | 30,918 | 30,918 | 30,918 | 32,951 | 32,951 | 35,055 | 35,055 | 351,230 |
| | Salary | 21,056 | 22,061 | 23,735 | 27,329 | 27,329 | 30,454 | 30,454 | 30,454 | 32,466 | 32,466 | 34,566 | 34,566 | 346,934 |
| | Merit | 0 | 39 | 170 | 373 | 373 | 465 | 465 | 465 | 485 | 485 | 488 | 488 | 4,296 |
| | Severance | 0 | 0 | 5,000 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 5,000 |
| | Total Employee Comp (less Equity) | 25,840 | 26,884 | 33,689 | 32,486 | 32,486 | 35,702 | 35,702 | 36,445 | 39,671 | 40,534 | 42,637 | 44,387 | 426,463 |
| | Total Employee Comp (Including Equity) | 25,840 | 26,884 | 33,689 | 32,486 | 32,486 | 35,702 | 35,702 | 36,445 | 39,671 | 40,534 | 42,637 | 44,387 | 426,463 |
| | Total Employee Comp (less Equity) | 25,840 | 26,884 | 33,689 | 32,486 | 32,486 | 35,702 | 35,702 | 36,445 | 39,671 | 40,534 | 42,637 | 44,387 | 426,463 |
| | Headcount | 7.00 | 7.00 | 8.00 | 9.00 | 9.00 | 10.00 | 10.00 | 10.00 | 11.00 | 11.00 | 12.00 | 12.00 | 116.00 |
| Bonus % | 22.72% | 21.65% | 20.01% | 17.27% | 17.27% | 15.47% | 15.47% | 17.87% | 20.40% | 23.01% | 21.63% | 26.62% | 20.00% | |

If a user happens to be a reviewer of more than one department, they may re-orientate this tab to view the compensation for all their reporting departments for easy comparisons and evaluation.

Workforce Planning V2 | Incomplete | US Operations - Microsoft Internet Explorer

EmployeeInformation | Input - Existing Headcount | Input - Compensation Planning | ExistingEmployeeSalaryCalc | Input - New Headcount | NewEmployeeSalaryCalc | Headcount Comp Summary

CorporateGuidelineSummary | BenefitAssumptions | BonusPlans | CorporateGuidelines | Differential | GradeLevelBy Position | MidpointPerformance | RecommendedMidSalary

Rows: EmployeeSummary [EmployeeSummary] HC_CompSummary [HC_CompSummary] Columns: Organization [Organization] Context: Total Year [Months]

| | | US Operations | US Procurement | US Manufacturing Control | US QC/QA | US Production |
|--------------------|--|---------------|----------------|--------------------------|----------|---------------|
| Existing Employees | Salary | 1,672,020 | 174,976 | 379,961 | 303,971 | 813,112 |
| | Merit | 24,178 | 4,296 | 5,930 | 3,944 | 10,008 |
| | Merit% | 1.45% | 2.45% | 1.56% | 1.30% | 1.23% |
| | Total Salary | 1,696,198 | 179,272 | 385,890 | 307,915 | 823,120 |
| | Severance | 5,000 | 5,000 | 0 | 0 | 0 |
| | Total Employee Comp (less Equity) | 2,017,460 | 241,679 | 452,707 | 358,515 | 964,559 |
| | Total Employee Comp (Including Equity) | 2,017,460 | 241,679 | 452,707 | 358,515 | 964,559 |
| | Headcount | 41.00 | 7.00 | 9.00 | 8.00 | 17.00 |
| | Bonus % | 18.65% | 32.02% | 17.31% | 16.43% | 17.18% |
| | Bonus | 961,650 | 171,958 | 207,927 | 152,615 | 429,150 |
| New Employee | Salary | 961,650 | 171,958 | 207,927 | 152,615 | 429,150 |
| | Merit | (0) | (0) | (0) | 0 | (0) |
| | Total Salary | 961,650 | 171,958 | 207,927 | 152,615 | 429,150 |
| | Total Employee Comp (less Equity) | 1,029,930 | 184,784 | 221,977 | 160,885 | 462,284 |
| | Total Employee Comp (Including Equity) | 1,029,930 | 184,784 | 221,977 | 160,885 | 462,284 |
| | Headcount | 41.00 | 7.00 | 9.00 | 8.00 | 17.00 |
| | Bonus % | 7.10% | 7.46% | 6.76% | 5.42% | 7.72% |
| | Bonus | 2,633,670 | 346,934 | 587,888 | 456,585 | 1,242,262 |
| | Merit | 24,178 | 4,296 | 5,930 | 3,944 | 10,008 |
| | Merit% | .92% | 1.24% | 1.01% | .86% | .81% |
| Total Employees | Total Salary | 2,657,848 | 351,230 | 593,818 | 460,530 | 1,252,270 |
| | Severance | 5,000 | 5,000 | 0 | 0 | 0 |
| | Total Employee Comp (less Equity) | 3,047,389 | 426,463 | 674,684 | 519,399 | 1,426,843 |
| | Total Employee Comp (Including Equity) | 3,047,389 | 426,463 | 674,684 | 519,399 | 1,426,843 |
| | Headcount | 738.00 | 116.00 | 169.00 | 143.00 | 310.00 |
| | Bonus % | 14.47% | 20.00% | 13.62% | 12.78% | 13.94% |
| | Bonus | 961,650 | 171,958 | 207,927 | 152,615 | 429,150 |
| | Merit | 24,178 | 4,296 | 5,930 | 3,944 | 10,008 |
| | Merit% | 1.45% | 2.45% | 1.56% | 1.30% | 1.23% |
| | Total Salary | 1,696,198 | 179,272 | 385,890 | 307,915 | 823,120 |

Corporate Guideline Summary

Tab eight, **CorporateGuidelineSummary**, compares **Proposed Merit Increase**, **Bonuses granted**, and **Equity awarded** to the corporate guidelines that have been set. Looking at the following screen, we notice that we were in a position to grant more merit dollars and stock options.

EmployeeInformation | Input - Existing Headcount | Input - Compensation Planning | ExistingEmployeeSalaryCalc

CorporateGuidelineSummary | BenefitAssumptions | BonusPlans | CorporateGuidelines | Differential | G

Rows: CorporateGuidelines [CorporateGuidelines] Columns: CorporateGuidelineMeasures [CorporateGuidelineMeasures]

| Corporate Guideline | Proposed | Variance | Comments |
|---------------------|----------|----------|----------|
| Merit% | 3.00% | 1.24% | 1.76% |
| Bonus% | 20.00% | 20.00% | .00% |
| Options | 2,000 | 1,000 | 1,000 |
| RSU's | 1,000 | 0 | 1,000 |
| Other | 0 | 0 | 0 |

This tab may also be re-orientated to give us a view of multiple departments.

EmployeeInformation

Input - Existing Headcount

Input - Compensation Planning

ExistingEmployeeSalaryCalc

Input - New Headcount

NewE

CorporateGuidelineSummary

BenefitAssumptions

BonusPlans

CorporateGuidelines

Differential

GradeLevelBy Position

MidpointPerfor

Rows:

Organization
[Organization]

Columns:

CorporateGuidelineMeasures
[CorporateGuidelineMeasures]

CorporateGuidelines
[CorporateGuidelines]

| | Corporate Guideline | | | | | Proposed | | | | | Variance | | | | |
|--------------------------|---------------------|--------|---------|-------|-------|----------|--------|---------|-------|-------|----------|--------|---------|-------|-------|
| | Merit% | Bonus% | Options | RSU's | Other | Merit% | Bonus% | Options | RSU's | Other | Merit% | Bonus% | Options | RSU's | Other |
| US Operations | 3.00% | 20.00% | 0 | 0 | 0 | .92% | 14.47% | 4,475 | 0 | 0 | 2.08% | 5.53% | (4,475) | 0 | 0 |
| US Procurement | 3.00% | 20.00% | 2,000 | 1,000 | 0 | 1.24% | 20.00% | 1,000 | 0 | 0 | 1.76% | .00% | 1,000 | 1,000 | 0 |
| US Manufacturing Control | 3.00% | 20.00% | 2,000 | 1,000 | 0 | 1.01% | 13.62% | 900 | 0 | 0 | 1.99% | 6.38% | 1,100 | 1,000 | 0 |
| US QC/QA | 3.00% | 20.00% | 2,000 | 1,000 | 0 | .86% | 12.78% | 875 | 0 | 0 | 2.14% | 7.22% | 1,125 | 1,000 | 0 |
| US Production | 3.00% | 20.00% | 2,000 | 1,000 | 0 | .81% | 13.94% | 1,700 | 0 | 0 | 2.19% | 6.06% | 300 | 1,000 | 0 |

Benefit Assumptions

This tab is the first of seven that are used to hold assumptions and corporate guidelines. The information they contain does not vary by department and no user input is allowed. At the discretion of your administrator, they may be hidden from the *Blueprint* users.

| Rows: BenefitAssumptions [BenefitAssumptions] | |
|---|---------|
| | Amount |
| Social Security Rate % | 6.20% |
| Social Security Cap | 102,000 |
| Medicare Rate % | 1.45% |
| SUI Rate % | 1.50% |
| SUI Cap | 26,000 |
| FUTA Rate % | .80% |
| FUTA Cap | 7,000 |
| Benefit Rate % | 27.00% |
| Individual Plan | 150.00 |
| Individual + 1 | 290.00 |
| Family Plan | 325.00 |

To show both types of functionality, some government impositions are calculated by referring to this cube for rates and caps; other government impositions have the caps and rates built into the calculation rules. Both methods work well and are easily updated.

Bonus Plans

When entering a performance level in the Input – Compensation Plan tab, this tab is referred to for calculating the bonus target percentage

Rows:

| | Star | High | Medium | Low |
|----|------|------|--------|------|
| 15 | 0.35 | 0.28 | 0.15 | 0.00 |
| 14 | 0.35 | 0.28 | 0.14 | 0.00 |
| 13 | 0.33 | 0.27 | 0.13 | 0.00 |
| 12 | 0.33 | 0.26 | 0.12 | 0.00 |
| 11 | 0.33 | 0.25 | 0.11 | 0.00 |
| 10 | 0.32 | 0.24 | 0.10 | 0.00 |
| 9 | 0.32 | 0.23 | 0.09 | 0.00 |
| 8 | 0.33 | 0.22 | 0.08 | 0.00 |
| 7 | 0.33 | 0.21 | 0.07 | 0.00 |
| 6 | 0.30 | 0.20 | 0.06 | 0.00 |
| 5 | 0.30 | 0.19 | 0.05 | 0.00 |
| 4 | 0.30 | 0.18 | 0.04 | 0.00 |

Corporate Guidelines

Corporate guidelines are used in the Corporate Guidelines Summary tab. In our model, corporate guidelines are the same for all departments. If desired, the data here could be maintained at the department level.

Rows:

| | Amount |
|---------|--------|
| Merit% | 3.00% |
| Bonus% | 20.00% |
| Options | 2,000 |
| RSU's | 1,000 |
| Other | 0 |

Differential

The differentials in the model are by location and grade. They also take into account exchange rates. This table is used to calculate the target base for new employees and to normalize the midpoint calculations in the compensation planning tab.

| Employee Information Input - Existing Headcount Input - Compensation Planning Existing Employee Salary Calc Input - New Headcount New Employee Salary Calc Headcount Comp Summary | | | | | | | | | | | | | | | |
|---|----------------------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Corporate Guideline Summary Benefit Assumptions Bonus Plans Corporate Guidelines Differential Grade Level By Position Midpoint Performance Recommended Mid Salary | | | | | | | | | | | | | | | |
| Rows: | Columns: | | | | | | | | | | | | | | |
| Differential Location (Differential Location) | SubLevelGrade (SubLevelGrade) | | | | | | | | | | | | | | |
| | 15 | 14 | 13 | 12 | 11 | 10 | 9 | 8 | 7 | 6 | 5 | 4 | 3 | 2 | 1 |
| Minneapolis, MN | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| Chicago, IL | 115% | 115% | 115% | 115% | 115% | 115% | 115% | 115% | 115% | 115% | 115% | 115% | 115% | 115% | 115% |
| New York, NY | 150% | 150% | 135% | 125% | 125% | 135% | 135% | 135% | 135% | 135% | 135% | 135% | 135% | 135% | 135% |
| Boston, MA | 75% | 75% | 80% | 80% | 80% | 80% | 80% | 80% | 80% | 80% | 80% | 80% | 80% | 80% | 80% |
| Los Angeles, CA | 135% | 135% | 120% | 120% | 120% | 120% | 120% | 120% | 120% | 120% | 120% | 120% | 120% | 120% | 120% |
| Bristol, UK | 107% | 107% | 114% | 114% | 114% | 114% | 114% | 114% | 114% | 114% | 114% | 114% | 114% | 114% | 114% |
| London, UK | 142% | 142% | 142% | 142% | 142% | 142% | 142% | 142% | 142% | 142% | 142% | 142% | 142% | 142% | 142% |
| Manchester, UK | 164% | 164% | 164% | 164% | 164% | 164% | 164% | 164% | 164% | 164% | 164% | 164% | 164% | 164% | 164% |
| Sydney, AU | 122% | 122% | 122% | 122% | 122% | 122% | 122% | 122% | 122% | 122% | 122% | 122% | 122% | 122% | 122% |
| Melbourne, AU | 140% | 140% | 140% | 140% | 140% | 140% | 140% | 140% | 140% | 140% | 140% | 140% | 140% | 140% | 140% |
| Perth, AU | 182% | 182% | 164% | 164% | 164% | 164% | 164% | 164% | 164% | 164% | 164% | 164% | 164% | 164% | 164% |
| Brisbane, AU | 91% | 91% | 97% | 97% | 97% | 97% | 97% | 97% | 97% | 97% | 97% | 97% | 97% | 97% | 97% |
| Narita, JP | 9522% | 9522% | 9522% | 9522% | 9522% | 9522% | 9522% | 9522% | 9522% | 9522% | 9522% | 9522% | 9522% | 9522% | 9522% |
| Tokyo, JP | 10950% | 10950% | 10950% | 10950% | 10950% | 10950% | 10950% | 10950% | 10950% | 10950% | 10950% | 10950% | 10950% | 10950% | 10950% |
| Osaka, JP | 14283% | 14283% | 12855% | 12855% | 12855% | 12855% | 12855% | 12855% | 12855% | 12855% | 12855% | 12855% | 12855% | 12855% | 12855% |
| Paris, FR | 461% | 461% | 461% | 461% | 461% | 461% | 461% | 461% | 461% | 461% | 461% | 461% | 461% | 461% | 461% |
| Lyon, FR | 530% | 530% | 530% | 530% | 530% | 530% | 530% | 530% | 530% | 530% | 530% | 530% | 530% | 530% | 530% |
| Strasbourg, FR | 691% | 691% | 622% | 622% | 622% | 622% | 622% | 622% | 622% | 622% | 622% | 622% | 622% | 622% | 622% |
| Berlin, GR | 137% | 137% | 137% | 137% | 137% | 137% | 137% | 137% | 137% | 137% | 137% | 137% | 137% | 137% | 137% |
| Bonn, GR | 158% | 158% | 158% | 158% | 158% | 158% | 158% | 158% | 158% | 158% | 158% | 158% | 158% | 158% | 158% |
| Frankfurt, GR | 206% | 206% | 185% | 185% | 185% | 185% | 185% | 185% | 185% | 185% | 185% | 185% | 185% | 185% | 185% |
| Munich, GR | 103% | 103% | 110% | 110% | 110% | 110% | 110% | 110% | 110% | 110% | 110% | 110% | 110% | 110% | 110% |

Grade Level by Position

When selecting a position for a new employee, the corresponding grade is looked up in this table.

| Rows: | |
|--|-------------|
| PositionCategory [PositionCategory] | |
| | Grade-Level |
| Account Consultant | 9 |
| Account Entry Spclst | 7 |
| Account Transfer Coordinator | 7 |
| Accountant | 8 |
| Accounting Clerk | 5 |
| Accounting Coordinator | 7 |
| Accounting Dir | 9 |
| Accounting Mgr | 9 |
| Accounts Processor I | 2 |
| Actuarial Analyst | 5 |
| Actuarial Assistant | 3 |
| Actuarial Assistant I | 2 |
| Actuarial Associate | 4 |
| Actuarial Trainee | 15 |
| Admin Assist II | 4 |
| Admin Asst III | 3 |
| Administrative Assistant | 5 |
| Advisory Serv Spec | 7 |
| Agency Manager | 9 |
| Asc Real Estate Finance Legal | 11 |
| Assoc Budget Analyst | 7 |
| Assoc Case Coordinator | 10 |
| Assoc Finance Dir | 11 |
| Assoc New Business Rep | 7 |
| Assoc, Mortgage Loan Servicing | 6 |
| Associate Business Analyst | 7 |
| Associate Call Center Director | 8 |
| Associate Funding Rep | 7 |

Midpoint Performance

The model calculates, in the Input – Compensation tab, the percentage of midpoint for an individual's salary and then, based on which midpoint range that falls into and their performance rating, a merit target percentage is looked up in this table.

| Rows: | | | | |
|------------------------------------|-------|-------|--------|-------|
| MidpointRanges [MidpointRanges] | | | | |
| | Star | High | Medium | Low |
| <90% | 9.50% | 7.00% | 4.00% | 1.50% |
| 90-105% | 7.50% | 5.00% | 3.00% | 1.00% |
| 105-115% | 6.00% | 4.00% | 2.00% | .00% |
| >115% | 5.00% | 3.50% | 1.50% | .00% |

Recommended Mid Salary

In the Input – New Headcount tab, when a position is selected, the grade is automatically looked up from the GradeLevelBy Position tab. That grade is then used to look up a recommended mid-salary from this table. That amount is then acted upon by the differential percentage, which is based upon location. The resulting calculation results in the target base for the new hire.

Rows:

Plans
[Plans]

Columns:

SubLevelGrade
[SubLevelGrade]

| | 15 | 14 | 13 | 12 | 11 | 10 | 9 | 8 | 7 | 6 | 5 | 4 | 3 | 2 | 1 |
|-----------|--------|--------|--------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| Plan 1 | 125000 | 110000 | 100000 | 85000 | 75000 | 65000 | 48000 | 37500 | 32500 | 27500 | 25000 | 23500 | 21000 | 18000 | 15000 |
| Plan 2 | 137500 | 121000 | 110000 | 93500 | 82500 | 71500 | 52800 | 41250 | 35750 | 30250 | 27500 | 25850 | 23100 | 19800 | 16500 |
| Plan 3 | 112500 | 99000 | 90000 | 76500 | 67500 | 58500 | 43200 | 33750 | 29250 | 24750 | 22500 | 21150 | 18900 | 16200 | 13500 |
| Plan 4 | 131250 | 115500 | 105000 | 89250 | 78750 | 68250 | 50400 | 39375 | 34125 | 28875 | 26250 | 24675 | 22050 | 18900 | 15750 |
| Plan 5 | 118750 | 104500 | 95000 | 80750 | 71250 | 61750 | 45600 | 35625 | 30875 | 26125 | 23750 | 22325 | 19950 | 17100 | 14250 |
| Plan Used | 125000 | 110000 | 100000 | 85000 | 75000 | 65000 | 48000 | 37500 | 32500 | 27500 | 25000 | 23500 | 21000 | 18000 | 15000 |

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- cut costs
- streamline processes
- boost productivity
- enable rapid response to opportunity
- increase management visibility

Staffed globally by experts in planning, technology, and performance and strategy management, the Innovation Center partners with more than 600 IBM Cognos customers, academicians, industry leaders, and others seeking to accelerate adoption, reduce risk, and maximize the impact of technology-enabled performance management practices.

About IBM Cognos BI and Performance Management

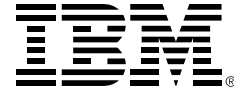
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