



AXIS INCENTIVE

Features & Benefits

- › Automated tracking of commissions allows you easy access to your staff's incentive earnings and reduces or eliminates manual payout calculations
- › A flexible range of incentive rate variables lets you easily generate the proper incentives for complicated sales situations
- › Integration with the Membership service area allows incentive processing for coverage types and unique Membership sales (for example, Automatic Credit Card Renewal)
- › Incentive quotas track sales and help reward employees for positive performance
- › Powerful reporting options let you monitor and analyze commissioned earnings and club performance
- › Flexible pay periods match your payroll calendar for easy incentive payouts
- › Incentive rate reports offer a convenient overview of your current rate setup, allowing you to update your incentive rates quickly and easily
- › Set sales targets and pay bonuses to CSRs who achieve pre-determined quota levels, as based on product counts or percentage of products sold
- › Incentive overrides handle unique service area calculations (e.g. overrides used for discounted or corporate rates)

AXIS Incentive provides an efficient, time-saving tool for defining and automatically calculating and reporting on Customer Service Representatives (CSRs) commissions and incentive earnings. Incentive integrates with AXIS service areas such as Membership, Travel, Auto Touring, Medical Insurance, Sundry, and Traveller's Cheques for processing various kinds of product sales.

For clubs using AXIS Navigator, dialog topics and promotions are displayed in the Navigator Client Workspace for CSRs to act on cross- and up-selling opportunities, and for starting a dialog with the member. Incenting front-line staff to act on such opportunities will help your club meet its MRM objectives while appropriately rewarding your staff for strengthening your club's relationship with members.

Incentive's reports also give you an overview of the effectiveness of MRM promotions, products and services in terms of achieved sales rates and quotas.

The Travel Point-of-Sale (TPOS) Interface to Incentive has been enhanced to better match how TPOS transactions operate. These changes only apply if your club uses Incentive for Travel transactions.

Powerful Incentive Tracking

The Incentive system calculates and records incentives and commission earnings generated by your CSRs on incentive-approved products, services and activities (e.g., collecting missing client information, suggesting authorized credit card renewal, etc.). Incentive supports all sales transactions processed via AXIS Point-of-Sale and Membership mailroom. The AXIS Travel Interface supports Incentives calculated on regular or weighted commission amounts and can reward agents for booking with preferred suppliers.

AXIS offers a range of options when defining incentives rates:

- ✓ Incentives can be generated as either a percentage of the sale amount as a flat amount, or as a flat rate for a group of products.
- ✓ Incentives can be calculated on a full sale amount or according to a pro-rated sale amount. For example, coverage purchased mid-year might generate 50% of the regular commission rate.

Incentive provides a number of powerful features to increase flexibility when calculating and recording commissions, allowing you to easily generate the proper incentives for complicated sales situations.

Incentive rates can be affected by the following configurable conditions:

- ✓ The effective date range of the incentive
- ✓ The sales group to which the CSR belongs - part-time employee may generate a different incentive rate than a full-time employee
- ✓ The type of product sold - different product types can generate different incentive rates
- ✓ The status group of the sale - a product can have any number of different status groups to differentiate incentives
- ✓ The compensation can be varied based on effective date(s), sales group, product(s) and status group.

Managing Quotas

Incentive's Quota tool allows you to set sales targets and pay bonuses to CSRs who achieve pre-determined quota levels. Quota determines how much commission a CSR will receive on their sales for certain products and services, based on product counts or percentage of products sold. You can also set different bonus rates for varying quota levels. Quotas are derived from Incentive calculations, so a CSR must already be set up to receive a base commission for a product, before qualifying for a quota bonus. Quotas are mapped to individual CSRs, not a sales group.

Service Area Integration

Incentive is configured to process and report commissions for Membership, Travel, Sundry, Medical Insurance, Traveller's Cheques, and other Point-of-Sale services. In the case of Members, Incentive provides the following Membership-specific features and functionality:

- ✓ Product groups to easily process incentives for different coverage types (primary, associate, plus, premier) and unique sales situations (for example, automatic credit card renewal and miscellaneous charges such as entrance fees)

- ✓ Status groups to differentiate incentive rates within coverage types (for example, renewals on suspended coverages, new coverages transferred in from different clubs, annually renewed coverages, etc.)
- ✓ Incentive overrides to effectively handle discounted, promotional and corporate rates
- ✓ A rate type override, useful for unique membership-specific conditions (for example, to recalculate incentives on sales to employees)
- ✓ In instances where two or more overrides apply, a priority system calculates an appropriate "incentive rate" combination.

Comprehensive Reporting

Incentive offers a number of powerful reporting options that let you monitor and analyze commissioned earnings and club performance of sales and services initiatives. Incentive reports provide detailed and summary overviews of commissioned earnings for user-defined pay periods.

Incentive reports also support the measurement of MRM-specific and other sales initiative metrics to gauge success rates.

Sales Register Report

Use the Sales Register Report to review sales transactions, including generated incentives, for each product sold by an employee for a specified pay period.

Payroll Register Report

Use the Payroll Register Report to review the commission amounts for each combination of pay type (percentage or flat dollar) and bill type (full or prorated) in each service area.

Incentive Rate Report

To effectively review and maintain your incentive rates, AXIS provides an Incentive Rate Report detailing your current rate setup, allowing you to quickly and easily update rates. For a quick rate review, a Preview option is available to calculate the incentive rate applied to a sample transaction. In addition, use the Preview option to review the incentive rate of a past transaction.

Related Product Sheets

- › Membership
- › Sundry
- › Medical Insurance
- › Traveller's Cheques
- › Travel



**AXIS MEMBERSHIP RELATIONSHIP
MANAGEMENT BUNDLE**

Integrated Solutions. Integrated Minds.