

Salesforce Spiff Training

COURSE CONTENT

GET IN TOUCH



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About Multisoft

Train yourself with the best and develop valuable in-demand skills with Multisoft Systems. A leading certification training provider, Multisoft collaborates with top technologies to bring world-class one-on-one and certification trainings. With the goal to empower professionals and business across the globe, we offer more than 1500 training courses, which are delivered by Multisoft's global subject matter experts. We offer tailored corporate training; project Based Training, comprehensive learning solution with lifetime e-learning access, after training support and globally recognized training certificates.

About Course

The Salesforce Spiff Training by Multisoft Systems is designed to help professionals master the automation of sales compensation management through Salesforce's innovative incentive platform, Spiff. This course equips learners with in-depth knowledge of how to design, implement, and manage real-time commission plans that motivate sales teams and align business goals with performance outcomes.

Module 1: Introduction & Overview

- ✓ Definition: Spiff as a commission / incentive compensation platform
- ✓ Business challenges with manual commission systems
- ✓ Key capabilities: real-time visibility, automation, auditability
- ✓ Spiff + Salesforce relationship (acquisition, add-on for Sales Cloud)
- ✓ Stakeholders and roles: Sales Reps, Sales Ops, Finance, Admins

Module 2: Spiff Designer & Plan Configuration

- ✓ Introduction to Spiff Designer UI (tabs, navigation)
- ✓ Creating a commission plan: plan hierarchy, periods, rules
- ✓ Data modeling: datasets, fields, filters, mapping to source systems
- ✓ Assignment of plans to users / roles
- ✓ Versioning, "ghost rules," plan changes, hidden plans

Module 3: Rules & Calculations (Line-by-Line Rules, Aggregations, Exceptions)

- ✓ Line-by-line rule basics and building them in Spiff
- ✓ Aggregated rules: applying thresholds, tiers, quotas
- ✓ Overrides, caps, minimums, exceptions
- ✓ Ghost / hidden rules (rules not yet active for reps)
- ✓ Tracing and auditability: how Spiff tracks calculations back to the data
- ✓ Handling plan changes mid period

Module 4: Data Integration & Pipelines

- ✓ Source systems: Salesforce objects (Opportunities, Quotes), ERP, spreadsheets, custom data
- ✓ Data import mechanisms: daily syncs, incremental vs full load
- ✓ Data mapping, transformations, filters
- ✓ Data validation, error detection & reconciliation

- ✓ Handling missing or mismatched data
- ✓ Dealing with currency, time zones, effective dates

Module 5: Commission Statements, Dashboards & User Experience

- ✓ Designing commission statements: line items, formatting, grouping
- ✓ Permissions and who sees what
- ✓ Commission Estimator (selling stage impact on commission)
- ✓ In-app notifications, comments, dispute resolution
- ✓ Manager dashboards, tracking attainment, pacing

Module 6: Payouts, Freeze / Recalculation, Audit & Compliance

- ✓ Freeze / locking logic: when to freeze a period to prevent changes
- ✓ Recalculation rules and retrospective corrections
- ✓ Adjustments and disputes workflow
- ✓ Audit trails, version history, change logs
- ✓ Compliance: revenue recognition (ASC 606, IFRS 15) and expense reporting

Module 7: Advanced Topics & Best Practices

- ✓ Global / multi-currency setups
- ✓ Portfolio-based or team-based commission schemes
- ✓ Handling mergers, reorganizations, role changes
- ✓ Performance tuning and scaling large organizations
- ✓ Change management, test & sandbox strategies
- ✓ Best practices for plan design and governance
- ✓ Troubleshooting common errors / issues