



Incentive Plan Worksheet

Determine Program Objectives

What are you hoping to achieve with your Incentive Program? Write down your goal below, adhering to the following criteria: SPECIFIC, MEASURABLE, ACHIEVABLE, RESULTS-DRIVEN, and TIMELY:

Establish Your Budget

Budget allocation is ultimately dependent on your ROI, or return on investment. Visit www.incentivesolutions.com/roi-calculator/ for help calculating your desired ROI and write your results below.

Target Your Audience

Who does your incentive program need to motivate in order to achieve your goals and objectives?

Choose Your Reward

Common reward options include incentive travel, merchandise, gift cards and reloadable debit cards. What reward type would most effectively motivate your target audience?

■ Identify KPIs

Key performance indicators can be divided into two camps: leading indicators (initial factors that affect outcome), and lagging indicators (program results). All are objective measurements to determine program success.

■ Customize with Technology & Tools

Your incentive program platform should be engaging, easy to use, and provide valuable program data with advanced incentive technology. Visit www.incentivesolutions.com/incentive-software-modules/ and record the software modules that best support your program goals.

■ Form a Marketing Plan

You'll want to engage your participants, communicate the value of your incentive program, and train them on how to participate! How will you keep your participants active? (Think: positive re-inforcement, enrollment strategy, communication frequency plans, etc)

■ Launch (and Manage!) Your Program

How will you effectively manage your program? Brainstorm weekly time allotment for data organization, monitoring KPI's, and overall participant engagement.

■ Analyze & Optimize

What worked? What didn't? How can you improve? Has the goal changed? Are there different technology modules you'd like to add on? Plan those below: