

Commission Data Readiness Checklist

Use this checklist to assess whether your commission data is controlled, reliable, connected, ready to support better incentive decisions, and identify where your commission data may need attention.

01

Data foundations and controls

- ☐ Accuracy, completeness, and timeliness controls are defined for core commission, producer, policy, premium, and payout data.
- ☐ Commission rules are version-controlled, with effective dates, ownership, and approval history.
- ☐ All payouts, adjustments, reversals, and exceptions are consistently captured.
- ☐ Data sources (including commission, CRM, policy, premium, business outcome data) are identifiable and documented.
- ☐ Data refresh cycles support operational needs (e.g., instantly, daily, weekly, per payout cycle).
- ☐ Universal identifiers exist, or a reliable mapping strategy is in place to link producers, partners, and customers.
- ☐ Historical data is complete enough to support trend analysis and comparisons.

02

Data quality and reliability

- ☐ Commission calculations can be traced from source data to final payout.
- ☐ Adjustments, chargebacks, and disputes are recorded in a structured, analyzable format.
- ☐ Premium, policy, and commission data reconcile without frequent manual fixes.
- ☐ Input validation against defined eligibility and rule conditions is consistently enforced.
- ☐ Data quality issues can be detected through defined checks, thresholds, or exception reports.

03

Integration across systems

- ☐ Commission data can be linked to CRM activity signals (leads, conversions, pipeline velocity).
- ☐ Policy and premium data can be tied to producer actions and incentive triggers.
- ☐ Outcome data, such as retention, persistency, cancellations, and profitability indicators, can be matched to payout patterns.
- ☐ Hierarchies, channel structures, and product metadata align across systems without manual stitching.

04

Transparency and governance

- ☐ All commission outputs are auditable, with traceable rule execution.
- ☐ Data owners are clearly designated for each dataset or field.
- ☐ Changes to rules, hierarchies, or eligibility conditions follow a documented review and approval workflow.
- ☐ Role-based access controls are properly defined for sensitive compensation data.
- ☐ Producers and managers have access to clear, dispute-reducing views of payouts.
- ☐ Compliance reporting (e.g., explanations for adjustments or incentive decisions) is easily generated.

05

Analytical readiness

- ☐ Data is extractable in an analytics-ready format without manual restructuring.
- ☐ Producers, products, and channels can be compared using consistent metrics.
- ☐ Persistency, conversion, and compensation cost metrics can be measured reliably.
- ☐ Dispute, exception, and adjustment patterns can be analyzed across time periods.
- ☐ Incentive components can be tied to measurable behavioral outcomes.

06

AI and automation readiness

- ☐ IDs and mappings are stable enough for automated entity matching.
- ☐ Adjustment and dispute data follow consistent patterns suitable for pattern detection.
- ☐ Historical data is consistent, labelled, and granular enough to support predictive or pattern-based use cases, such as chargeback risk analysis.
- ☐ Commission rules are structured enough to support scenario analysis or hypothesis testing.
- ☐ Governance ensures AI insights won't conflict with compliance or payout transparency requirements.

07

Operational readiness

- ☐ Reports and alerts reach the right users early enough to support action, not only after-the-fact review.
- ☐ Business and operations teams understand which data sources to use for reporting, disputes, analysis, and decision-making.
- ☐ There is a documented workflow for handling data issues, disputes, or reconciling inconsistencies.

Found gaps in your commission data readiness?

Speak to us about how SAP Pioneer's Incentive and Commission Management (ICM) can help strengthen data structure, traceability, and control across commission processes.

Speak to us →