

October 27, 2015

# I'm Paying My Top Four People \$1Million-- What am I Getting for it?



THE VISIONLINK  
ADVISORY GROUP

Today's Presenter:

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- Founded in 1996
- Over 450 Clients in North America
- Focus: Compensation design and management that drives growth

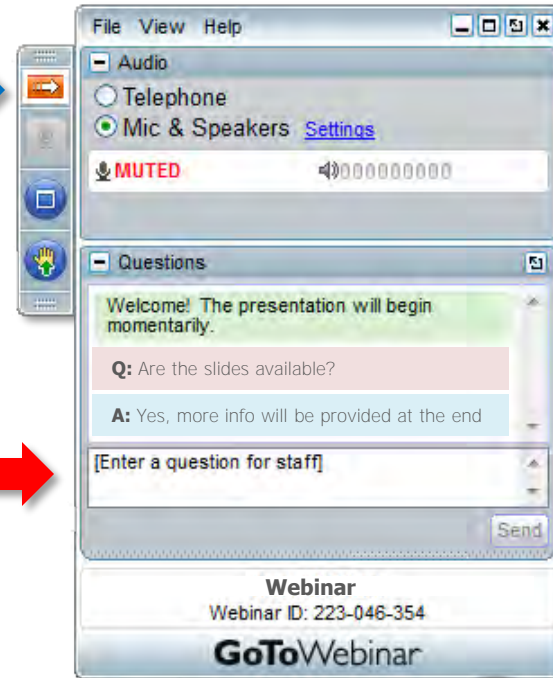
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# Key Questions

- What is the overall purpose of your pay program?
- How are you determining whether you're accomplishing that purpose?
- What type of pay philosophy will work best for your business?
- What changes, if any, should you make to achieve better results?



# Let's take a look at FoxHill's 4 VPs

## Total Rewards Investment (TRI)

Name	Position	Annual Salary	Last Year's Short-term Incentives	Last Year's Long-term Incentives	Total Direct Comp	H&W Annual Value	QRP Annual Value	ExBen Annual Value	Total Indirect Comp	Total Rewards Investment
Janice Porter	VP	\$ 185,000	\$ 44,000	\$ -	\$ 229,000	\$ 28,284	\$ 11,000	\$ -	\$ 39,284	\$ 268,284
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# Let's take a look at FoxHill's 4 VPs

## Total Rewards Investment (TRI) Allocation

TRI looks at each component of pay as a percentage of the total

Name	Salary	STI%	LTI%	H&W%	QRP%	ExBen%	TRI
Janice Porter	69.0%	16.4%	0.0%	10.5%	4.1%	0.0%	\$ 268,284
Evelyn Jamison	71.6%	21.9%	0.0%	17.8%	0.0%	0.0%	\$ 248,650
Amir Pashan	73.3%	21.6%	0.0%	9.7%	5.2%	0.0%	\$ 240,155
Kan Watanabe	67.9%	21.2%	0.0%	19.7%	6.3%	0.0%	\$ 242,911

## TRI% (Total)

Salary	STI%	LTI%	H&W%	QRP%	EB%
70%	20.3%	0.0%	14.4%	3.9%	0.0%

# Let's take a look at FoxHill's 4 VPs

## Total Allocation



# What behavior should we expect? What questions might employees ask?

- Behavior
  - Focus on short-term results
- Questions
  - Do I have a long-term future with the organization?
  - Should I be concerned with the company's long-term results?



# Some questions for us as the planners

- Why are the STIP targets varied by person?
- Why no LTIP?
  - Why no long-term perspective on value sharing?\*
- What is the pay philosophy here?
  - “We pay well for short-term results!”
- How can we measure the return FoxHill is getting on its TRI?



# Let's look at a way to measure the return on the TRI





# Pay the Company First

**ROTRI™**

**Return on Total Rewards Investment™**

Measuring the return on your compensation investment



# How much is your Total Rewards Investment?

- Salaries
- Commissions
- Bonuses
- Deferred award accruals (LTIP)
- Core benefits (H&W)
- Executive benefit plans
- Retirement contributions



The background of the slide features a light blue and white color scheme. It includes several faint, stylized elements: a large upward-pointing arrow on the right side, a jagged line graph resembling a stock market chart, and several dollar signs (\$) scattered throughout. In the center, there are faint silhouettes of four business professionals in suits. The text is centered over these elements.

What return do you get on  
that investment?

           %

# ROTRI™ Example:

Capital Account	\$ 20,000,000
Cost of Capital	12%
Capital Charge	\$ 2,400,000
Operating Income	\$ 10,000,000
Productivity Profit	\$ 7,600,000
Total Rewards Investment	\$ 25,000,000

ROTRI™

30.4%

(ROTRI™ = Productivity Profit/Total Rewards Investment)

# ROTRI™ Example:

Capital Account \$ 20,000,000

Cost of Capital 12%

Capital Charge \$ 2,400,000

Operating Income \$ 10,000,000

**Productivity Profit** **\$ 7,600,000**

Total Rewards Investment \$ 25,000,000

ROTRI™

30.4%

***Variable Pay Plans (Value Sharing) are financed from Productivity Profit***



# If ROTRI™ is improving...

- Shareholders are experiencing a positive return on the compensation investment
- They should be open to expanding compensation arrangements and levels



The background of the slide features a light blue and white color scheme. It includes several horizontal bands of dollar signs (\$\$\$\$) and a large, stylized upward-pointing arrow on the right side. In the center, there are faint silhouettes of four business professionals in suits, standing in a line. The overall aesthetic is clean and professional, typical of a corporate presentation.

So now we have a way to  
measure our return.

But how do we even know we  
have the right approach to pay?

# We need to look at pay philosophy

- Why do we pay?
- What results do we pay for?
- How much do we pay?
- How do we pay?
  - What should be the balance between short-term and long-term pay?
  - Who participates in which components of pay?
- Other descriptions of beliefs and practices

## FoxHill Compensation Philosophy Statement

FoxHill compensation philosophy has one overarching goal: rewarding employees for driving outstanding business performance. This goal will be accomplished by rewarding exceptional performance with above market compensation when outstanding business results are delivered. FoxHill compensation strategies will be highly differentiated with Pay for Performance being the primary philosophy.

FoxHill is committed to providing high quality compensation and benefits programs in order to attract and retain superior talent. We want our employees to be able to provide a meaningful standard of living for themselves and their families, help secure their health and well-being, and plan for a secure financial future.

Our pay programs will focus on rewarding employees who contribute to the fulfillment of our business objectives, which include: (a) steady growth of sales revenue, (b) maintenance of positive and improving margins, (c) careful management of expenses, and (d) retention of our customers through excellent service. Ultimately, our ability to provide significant compensation for our employees is tied to our ability to contribute to the creation of value for our clients.

In order to accomplish this, FoxHill will utilize the following compensation components:

- **Base salaries** –Salaries are targeted to fall near the 50<sup>th</sup> percentile of the market (compared to companies of similar size, business scope, and growth posture in Chicago);
- **Short-term incentives** – FoxHill offers annual bonuses tied to a percentage of an employee's salary or overall company profits that compete favorably with those offered within other similar firms. FoxHill targets incentive pay at the 50<sup>th</sup> percentile against peer benchmark data.
- **Long-term incentive plans** - Where appropriate, Long-Term incentives are offered to those employees, primarily at the senior level, whose job duties relate to the development and/or preservation of long-term value;
- **Benefits plans** – FoxHill provides core benefit programs comparable to market norms and capable of providing employees with meaningful levels of security for themselves and their dependents.
- **Retirement Plans** – With our defined benefit retirement program, FoxHill leads the market in terms of retirement benefits. Company contributions towards employee retirement help our employees to prepare for the future.

FoxHill is a relatively small company and, thus, cannot provide every type of compensation program that might be provided in large company environments. In addition, the size or amount of pay elements may not always be competitive with every peer company. However, FoxHill's culture is also an important part of the overall value proposition offered to employees. FoxHill is determined to offer an environment

that encourages personal development, adequate free time, flexible work scheduling (where conducive to the job duties) and opportunities for professional growth. FoxHill employees should take the value of these intangible benefits into consideration when evaluating the overall worth of the FoxHill's job experience.

Overall our pay programs reflect fixed or guaranteed elements (e.g., salaries and benefits) along with variable or non-guaranteed elements (short- and long-term incentives). The incentive plans are a crucial element of FoxHill's **Pay for Performance** strategy. These "at risk" elements provide the strongest link to FoxHill's business plan. Annually, or more often as needed, FoxHill's leadership will emphasize and communicate to employees the most important areas to focus on in order to achieve the business plan objectives. FoxHill will structure the incentive plans around these areas. For example, in a given year FoxHill may emphasize revenue growth, margin expansion, new client acquisition, client retention, certain profit goals, or other key metrics of business performance. FoxHill will tie incentive payments to these key indicators to ensure that employees will understand precisely the linkage between **Pay and Performance**. The financing for FoxHill's incentive plans will come from the achievement of the desired business results.

No employees are assured of receiving incentives in any given year. The nature of our business can lead to unexpected revenue reductions. These periods in our business cycle may result in the need for shareholders and employees alike to make sacrifices in order to serve our customers and provide for the long-term stability of the firm. At the same time, in profitable years we recognize the contributions of valuable employees and stand firmly committed to share our financial success.

As stated above, our compensation and rewards programs are intended to help employees meet their cash flow, security and wealth accumulation needs. FoxHill will do its best to communicate how its programs are designed to do so. We want our employees to understand each element of pay, see the standards and metrics for achievement as being believable and consider the overall value of the pay programs to be meaningful to them. In this sense we are striving to create a unified financial vision between shareholders and employees to operate and grow our company successfully.

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**Tom Miller**  
Why we pay.



**Tom Miller**  
What we pay for.



**Tom Miller**  
How much we pay.



# Conservative Pay Profile

Profile	Base Pay	Short-Term Incentives	Long-Term Incentives	Core Benefits	Retirement
Conservative	High	Low	Moderate	High	Moderate

**Provides a high degree of employee security at the expense of variable pay**

High base salaries and low incentives

Generally offers high level of core benefits

Cash friendly stable organization

Generally attractive to a younger employee population

Can inhibit the hiring of “high performers”

Rewards performance through merit/promotion

Retains executive leadership through moderate long-term awards

# Variable Pay Profile

Profile	Base Pay	Short-Term Incentives	Long-Term Incentives	Core Benefits	Retirement
Variable	Low	High	High	Moderate	Moderate

**Provides a high degree of upside earning potential with higher level of risk**

- Base salaries at or below market
- Rewards tied directly to business performance
- Entrepreneurial mindset – less cash friendly
- Attracts high performers, frightens risk averse
- Rewards performance through incentive pay
- Promotes high level of value sharing
- Attracts entrepreneurial leadership through long-term awards

# Moderate Pay Profile

Profile	Base Pay	Short-Term Incentives	Long-Term Incentives	Core Benefits	Retirement
Moderate	Moderate	Moderate	Moderate	Moderate	Moderate

## **Provides a middle of the road approach to pay**

Base salaries at market

Some upside incentive potential

Performance rewarded moderately

Attracts a diverse employee population

Rewards performance through multiple facets

Tries to provide a balanced approach without any distinguishing element of pay


# Which philosophy does FoxHill have?

conservative?

variable?

Total Rewards Investment (TRI)										
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		\$ 704,000	\$ 156,000	\$ -	\$ 860,000	\$ 109,526	\$ 30,474	\$ -	\$ 140,000	\$ 1,000,000

moderate?



How does this happen?  
Why don't more companies  
have a systematic philosophy  
and process?



# *Stages*

Seeking a Transformation

Making an Investment

Getting Complicated

Ramping Up

Just Startin'

# Just Startin'



When do you move to this stage?

- Hiring your first few employees

Characteristics

- Negotiating salaries

Who's Making Most Decisions?

- Owner

Biggest Challenges

- Finding payroll provider
- Meeting payroll

Employee Quality and Engagement Indicators

- Low expectations; grateful for the job

# Ramping Up



When do you move to this stage?

- 6-15 employees

Characteristics

- Simple benefits plan
- *Ad hoc* year-end bonus

Who's Making Most Decisions?

- Owner; perhaps a trusted support person

Biggest Challenges

- Finding a benefits broker
- Determining what you can afford
- Trying to be "fair"

Employee Quality and Engagement Indicators

- At first, employees are very grateful; bonuses may generate an entitlement issue

# Getting Complicated



When do you move to this stage?

- 25-100 employees

Characteristics

- Multiple people in the same position
- People asking for “more”
- Profit sharing bonuses
- 401(k) plan

Who's Making Most Decisions?

- Owner; Office Manager or 1<sup>st</sup> HR person

Biggest Challenges

- Legal compliance
- Benefits Law
- Compensation Law (FLSA)
- Third-party vendor management

Employee Quality and Engagement Indicators

- Employees generally satisfied; starting to notice inequalities and inconsistencies

# Making an Investment



When do you move to this stage?

- 100+ employees

Characteristics

- Market assessments
- Early stage pay grades
- Structured bonuses

Who's Making Most Decisions?

- Owner – HR Manager – Sr. Finance Person

Biggest Challenges

- Internal equity issues
- Top people asking for equity
- Retention of premier talent

Employee Quality and Engagement Indicators

- Top employees wondering how they can increase pay and where their long-term value will come from

# Seeking a Transformation



**When do you move to this stage?**

- Any size (typically 100 or more)

**Characteristics**

- Compensation Philosophy Statement
- Comprehensive Pay Structure
- Balance short-term and long-term incentives
- Supplemental executive benefits
- Stewardship and Accountability Systems

**Who's Making Most Decisions?**

- Internal Compensation Action Committee

**Biggest Challenges**

- Establishing a system
- Staying true to the CPS
- Measuring the return on the TRI
- Reinforcing the partnership commitment to employees

**Employee Quality and Engagement Indicators**

- High engagement; respect for business model; value sharing system is clearly understood

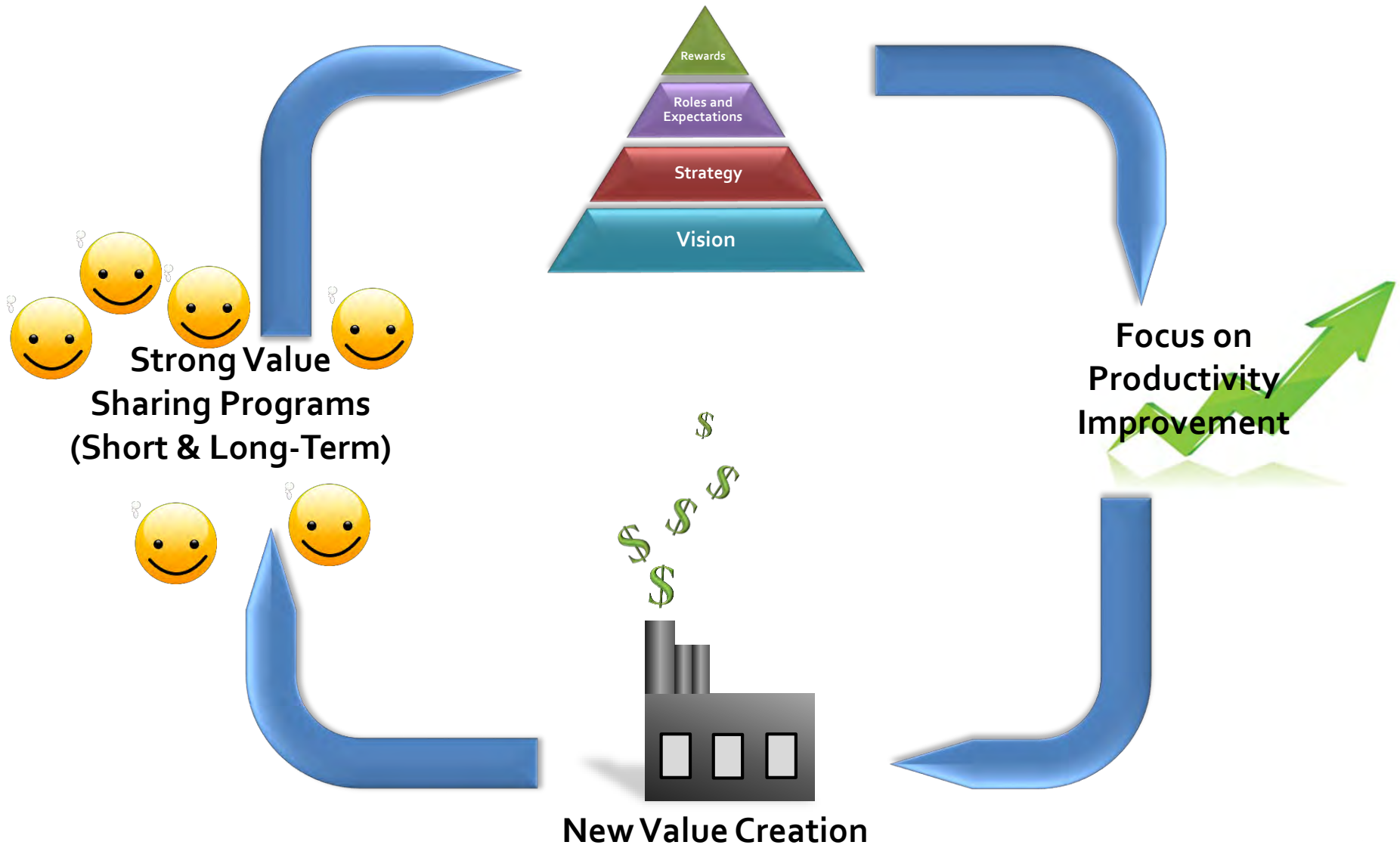
Stage	Just Startin'	Ramping Up	Getting Complicated	Making an Investment	Seeking a Transformation
When do you move to this stage?	Hiring your first few employees	6-15 employees	25-100 employees	100+ employees	Any size (Typically 100 or more)
Characteristics	Negotiating salaries	Simple benefits plan	Multiple people in the same position	Market assessments	Compensation Philosophy Statement
		<i>Ad hoc</i> year-end bonus	People asking for "more"	Early stage pay grades	Comprehensive Pay Structure
			Profit sharing bonuses	Structured bonuses	Balanced short-term and long-term incentives
			401(k) plan		Supplemental executive benefits
					Stewardship and Accountability Systems
Who's Making Most Decisions?	Owner	Owner; perhaps a trusted support person	Owner; Office Manager or 1st HR person	Owner--HR Manager Sr. Finance Person	Internal Compensation Action Committee
Biggest challenges	Finding payroll provider	Finding a benefits broker	Legal compliance	Internal equity issues	Establishing a system
	Meeting payroll	Determining what you can afford	Benefits Law	Top people asking for equity	Staying true to the CPS
		Trying to be "fair"	Compensation Law (FLSA)	Retention of premier talent	Measuring the return on the total rewards investment
			Third-party vendor management		Reinforcing the partnership commitment to employees
Employee Quality and Engagement Indicators	Low expectations; grateful for the job	At first, employees are very grateful; bonuses may generate an entitlement issue	Employees generally satisfied; starting to notice inequalities and inconsistencies	Top employees wondering how they can increase pay and where their long-term value will come from	High engagement; respect for business model; value sharing system is clearly understood



# What should employees understand?



# Ownership Mentality



# What do we mean by “Value Sharing”

- Variable pay arrangements (commonly referred to as incentives or bonuses)
- Not trying to “change behavior”
- Not obsessed with “market values”
- Value Sharing reflects this philosophy:
  - “Here’s what value creation means here.”
  - “Here’s how you can contribute.”
  - “Here’s how we share the value you help create.”



# Why Value Sharing Matters

1. Value sharing attracts premier talent
2. Value sharing plans reinforce the company's business model (how do we make money?)
3. Value sharing protects against bad profits (i.e., profits at any cost) and promotes good profits (i.e., profits that build sustainable enterprise value)
4. Value sharing encourages an ownership mindset
5. Value sharing builds trust and accelerates results

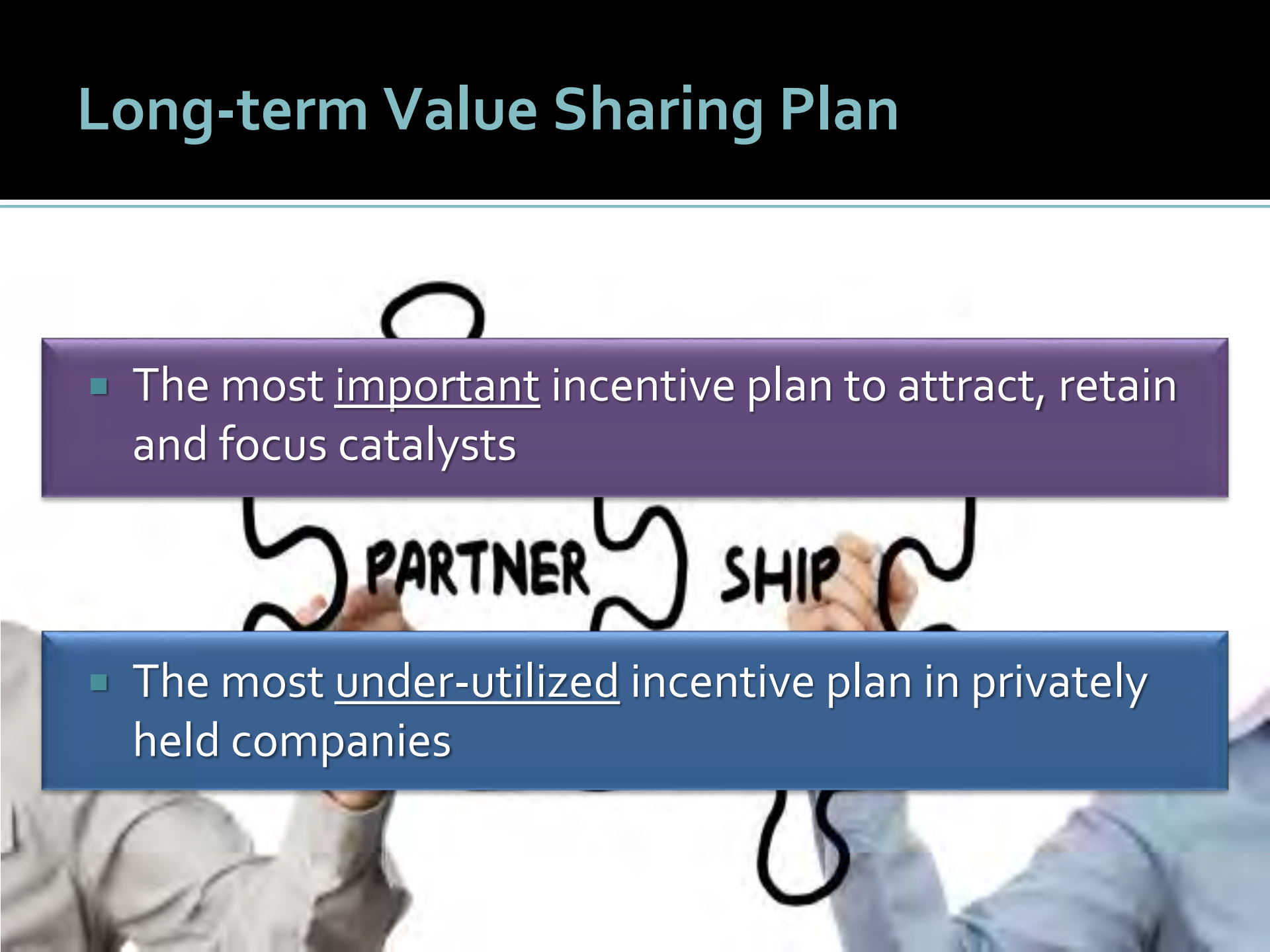


# Long-Term Value Sharing Plans

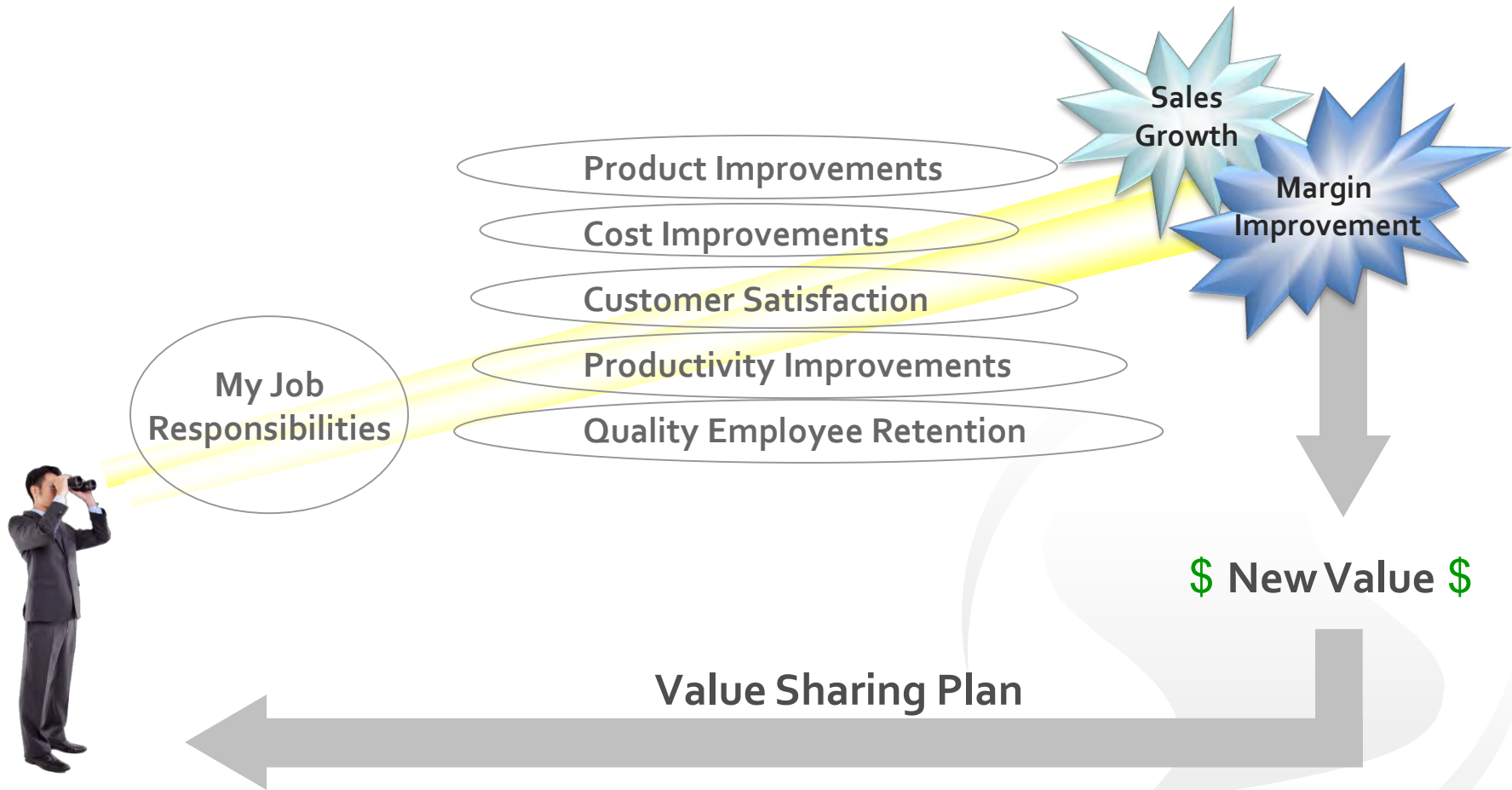
- May be the single most important component in attracting “catalysts”
- Should be used in every size organization
- Create “wealth multiplier” mindset
- Tie employees to vision and growth plan of the company



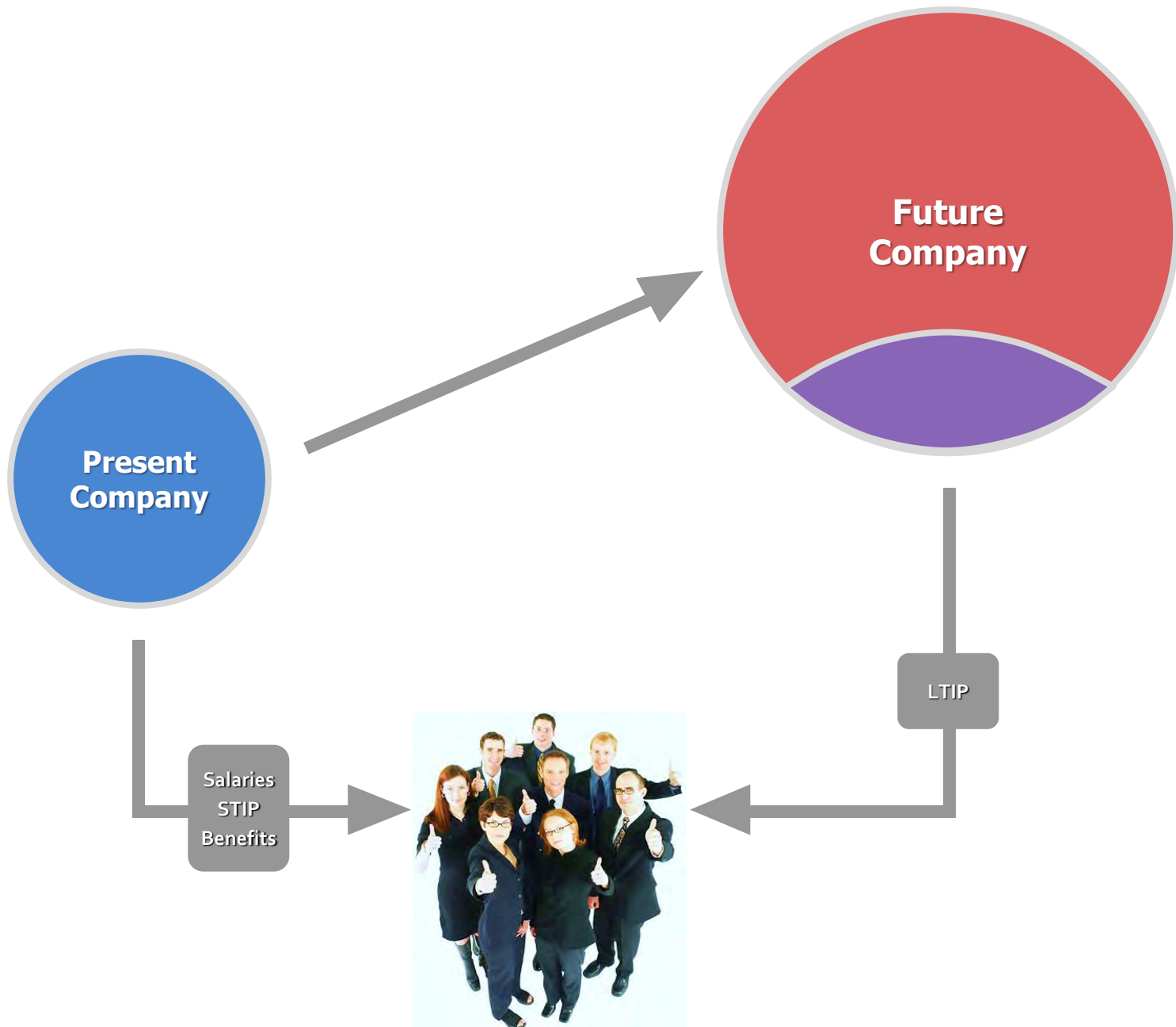
# Long-term Value Sharing Plan

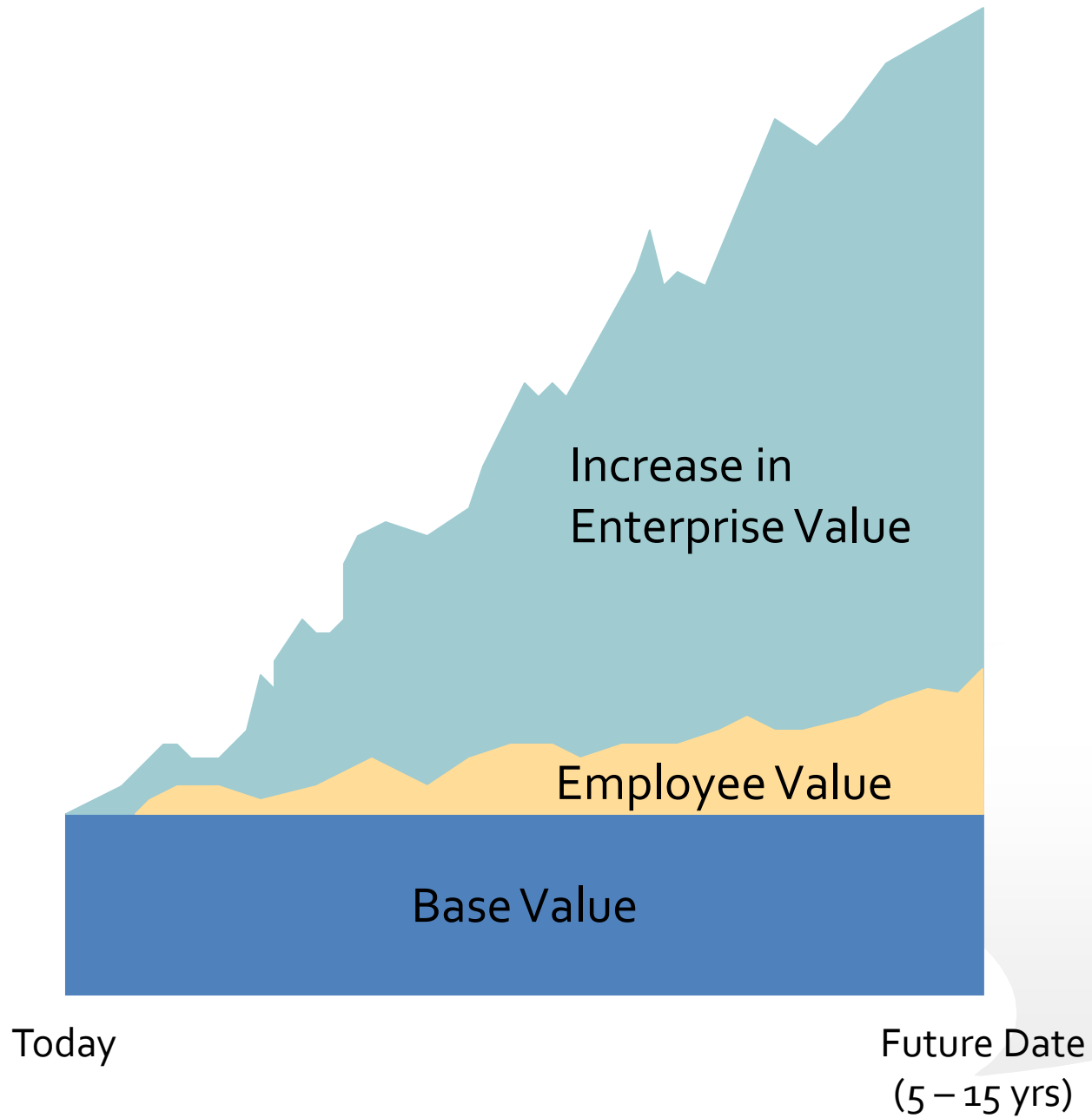
- 
- The most important incentive plan to attract, retain and focus catalysts
  - The most under-utilized incentive plan in privately held companies

# Line of Sight









# The Old and the New

## Total Rewards Investment (TRI)

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## Revised Total Rewards Investment (TRI)

Name	Position	Annual Salary	Short-term Incentives	Long-term Incentives	Total Direct Comp	H&W Annual Value	QRP Annual Value	ExBen Annual Value	Total Indirect Comp	Total Rewards Investment
Janice Porter	VP	\$ 185,000	\$ 37,000	\$ 37,000	\$ 229,000	\$ 28,284	\$ 11,000	\$ 9,250	\$ 39,284	\$ 268,284
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										<b>\$ 160,800</b>

# The Old and the New

Total Allocation



■ Salary ■ STI% ■ LTI%  
■ H&W% ■ QRP% ■ ExBen%

Total Allocation



■ Salary ■ STI% ■ LTI%  
■ H&W% ■ QRP% ■ ExBen%

# A Wealth Multiplier Mindset

- Locked in on sustainable long-term growth
- More likely to attract premier leadership talent
- Compensation is viewed as the system for sharing financial value with employee-partners
  - Salaries are not the center of attention
  - Annual variable pay is uncapped
  - Long-term plan is a huge upside opportunity (link to shareholders)



# What to expect:

- Increased ownership mentality (“we’re in the same boat”)
- Higher engagement
- Balanced focus on short-term and long-term results
- Higher ROTRI (even with increased investment)
  - **BTW, the LTIP doesn’t pay off if value isn’t created**
- Better value proposition for new recruits
- Greater retention (lower turnover)



# Employee Perspective

I'm in the same boat as owners (*alignment*)

My annual incentive directly reflects material value creation for shareholders and it's correlated with my personal contribution (*pay for performance*)

If I stay I stand to earn a significant amount of wealth—and I will deserve it (*retention*)

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# Conclusions

- The owners of FoxHill were getting a mediocre return on their investment of \$1mm in their top 4 people
- After . . .
  - Adopting a variable pay philosophy (and communicating it)
  - Adding a LTIP and balancing the short- and long-term awards
  - Clarifying expected results (i.e., the both plans have clear performance expectations)
  - Including a targeted executive benefits component
- They have sent a new partnership/value-sharing message; backed it up by increasing the overall TRI; more tightly aligned owner-employee wealth objectives
- Watch their growth accelerate!



**Type Your Questions**

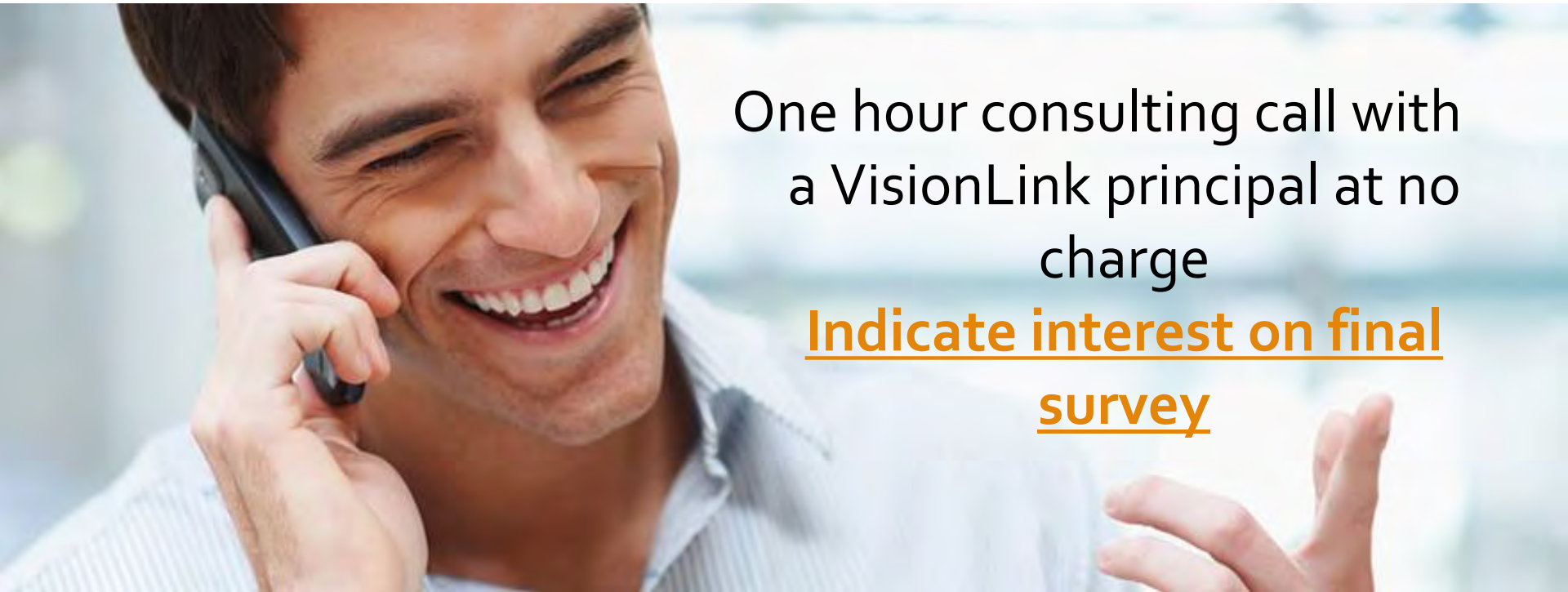
# BonusRight



The screenshot displays the BonusRight SaaS tool interface. At the top left, a cartoon woman with glasses and a white shirt points upwards. To her right, the text reads: "Let's define your plan" followed by "You might wind up with multiple plans within your company, or just 1". A pencil icon is positioned to the right of this text. Below the woman, a section titled "Here's how we define a plan" with a question mark icon contains the text: "As you can see there are four things to capture. Tell us a little about each. You can easily change any input at any time." Below this text are four input fields labeled "PEOPLE", "METRICS", "METRICS", and "DESIRED RESULTS", each with an information icon (i) to its right. To the right of the input fields is a large, stylized circular graphic with a teal and grey color scheme. Inside the circle, it says "15% PLAN COMPLETE". Above the circle is an "EDIT" button with a pencil icon. Below the circle is a "NEXT" button with a right arrow icon.

- New SaaS tool in development
- Build and manage your bonus plan online
- **Indicate on survey if you would like to be notified of early release date.**

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**SURVEY**



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*We value your input.*

*Request a copy of our slides, white paper and a complimentary consultation.*



# Upcoming VisionLink 2015 Online Seminars:

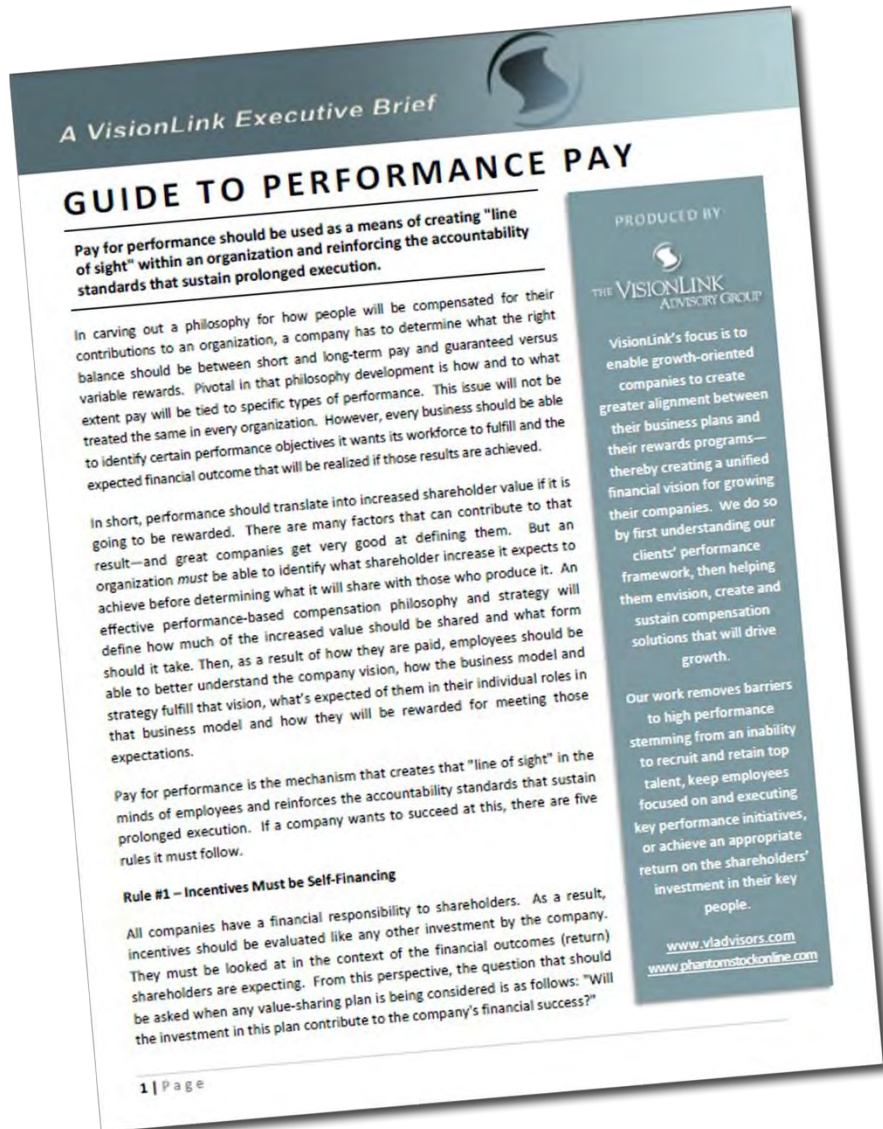
<b>How to Build and Manage a Total Compensation Structure</b> (HR Audience)	<b>Nov 11<sup>th</sup></b>
<b>Performance-Based Pay that Actually Performs</b> <i>How to Engineer Rewards that Drive the Outcomes You Want</i>	<b>Dec 8<sup>th</sup></b>

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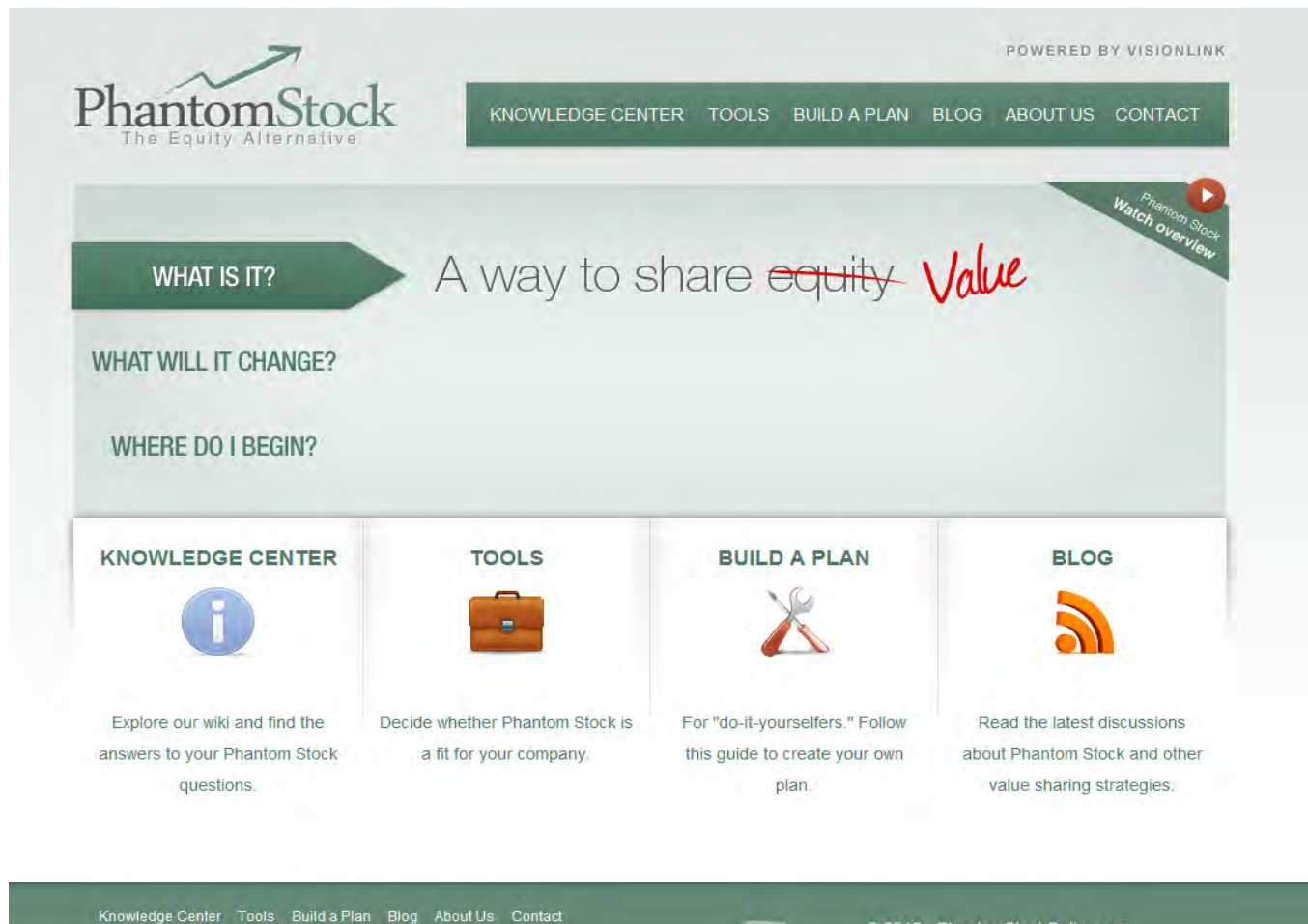
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Q&A





# Thank You



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