CASE STUDY

Aligning Sales Incentives and Quote Operations to Support Revenue Growth

Sales Operations transformation through shipping-cost standardization and incentive modeling

COMPANY	Ricoma International	FUNCTION	Sales Operations / Analytics
ROLE	Sales Operations Analyst Lead	FOCUS	Quote logic + commission redesign

THE ENGAGEMENT IN ONE SENTENCE

Reduce friction in the sales process by standardizing operational quote logic while redesigning compensation to better align representative behavior with revenue performance.

PORTFOLIO NOTE The case combines shipping-cost / quote standardization and sales-compensation scenario modeling. The documented 40% revenue increase is treated as a period-level business outcome, not proof that either intervention alone caused the full increase.

Executive Summary

The work addressed the commercial system from two sides: execution and motivation. A shipping calculator made operational quote rules faster and more consistent for sales reps; a commission model made incentive tradeoffs visible to leadership through historical sales analysis and tier-based scenarios.

QUOTE	OPS	INCENTIVE	OUTCOME
Standardized logic	Reduced lookup	Tier scenarios	40% revenue growth

TURNING OPERATIONAL RULES INTO A SALES TOOL

1. Standardizing Shipping & Quote Logic

The shipping workbook consolidated equipment configuration, destination, crating / ramp needs, and documentation considerations into a single calculator. Rather than relying on repeated manual lookup, representatives could select the relevant inputs and receive a consistent estimated total.

Shipping Cost Quote Calculator

Interactive portfolio model — choose equipment and destination to calculate a representative quote.

INPUT	SELECTION
Equipment Configuration	1 Head
Destination State	Florida - FL
Ramp Required?	No

CALCULATED QUOTE	
Base Shipping	$565
Crating	$0
Ramp	$0
Estimated Total	**$565**

Documentation / Compliance Prompt	
Rule	Single-purchase certificate
Applicability	May vary by transaction type

Portfolio note: The original operational workbook combined destination, equipment configuration, crating/ram sales-facing calculator. This version keeps that workflow while using representative pricing and generalized con quotes.

Figure 1. Sanitized Dynamic Shipping Cost & Quote Calculator

MAKING INCENTIVES MEASURABLE

2. Redesigning Sales Compensation

The commission model analyzed historical representative sales, applied a current blended commission assumption, and compared it with a proposed tier-based structure. The point was not simply higher payouts; it was transparent scenario analysis showing how compensation changed as average monthly sales moved through performance bands.

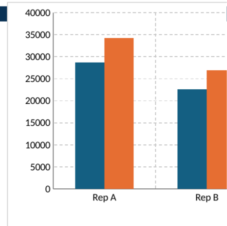
Sales Compensation & Revenue Scenario Analysis — Portfolio Sampl e

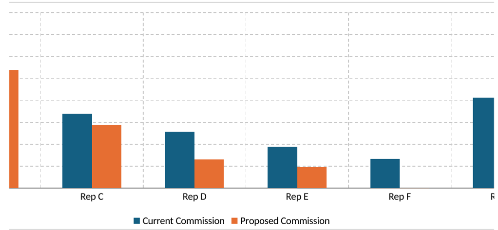
Anonymized example demonstrating historical sales analysis, tier-based commission modeling, c and side-by-side compensation impact.

Rep	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Total Sales	Avg Monthly Sales	Current Rate	Current Commission	Proposed Rate
Rep A	$210,000	$180,000	$155,000	$240,000	$190,000	$175,000	$1,150,000	$191,667	2.5%	$28,750	3.5%
Rep B	$165,000	$142,000	$138,000	$160,000	$149,000	$152,000	$906,000	$151,000	2.5%	$22,650	3.5%
Rep C	$112,000	$98,000	$121,000	$105,000	$118,000	$126,000	$680,000	$113,333	2.5%	$17,000	2.5%
Rep D	$88,000	$76,000	$91,000	$84,000	$79,000	$95,000	$513,000	$85,500	2.5%	$12,825	1.5%
Rep E	$62,000	$55,000	$68,000	$71,000	$59,000	$65,000	$380,000	$63,333	2.5%	$9,500	1.5%
Rep F	$42,000	$37,000	$49,000	$46,000	$44,000	$51,000	$269,000	$44,833	2.5%	$6,725	0.0%
Rep G	$135,000	$128,000	$144,000	$131,000	$139,000	$148,000	$825,000	$137,500	2.5%	$20,625	2.5%
Rep H	$185,000	$172,000	$198,000	$205,000	$194,000	$188,000	$1,142,000	$190,333	2.5%	$28,550	3.5%

Model Summary

Metric	Value
Total Sales	$5,865,000
Current Comm	$146,625
Proposed Com	$138,508
Net Variance	-$8,118





Figures 2–3. Sanitized historical-sales and current-versus-proposed commission analysis

- Historical sales performance established the analytical baseline.
- Tier thresholds translated performance expectations into explicit payout logic.
- Current and proposed payouts could be compared rep by rep.
- Formula-driven assumptions made the model reviewable and adjustable by leadership.

ONE COMMERCIAL SYSTEM, NOT TWO SPREADSHEETS

3. Connecting Operations and Incentives

The two workstreams addressed the same revenue engine from different directions. Standardized quote logic reduced friction and ambiguity in executing a sale; compensation modeling aligned representative incentives with measurable performance. Together, they represent an operating-model approach rather than isolated spreadsheet work.

1. STANDARDIZE	2. REDUCE	3. ALIGN	4. MEASURE	5. IMPROVE
Quote rules	Sales friction	Incentives	Scenarios	Performance

Commercial logic

- Clearer quote inputs support faster, more consistent sales execution.
- Consistent operating assumptions improve the reliability of downstream sales analysis.
- Tiered commission logic makes performance expectations explicit before rollout.
- Scenario models expose payout tradeoffs instead of hiding them in ad hoc calculations.

Causality guardrail

These artifacts support a relationship between operational standardization, incentive redesign, and a broader Sales Operations transformation. They do not isolate how much of the revenue change came from shipping standards versus compensation versus other concurrent changes.

WHAT THE RECORDS SUPPORT

4. Evidence, Outcomes & Decision Support

My résumé documents a 40% revenue increase at Ricoma and attributes the broader result to ERP workflow reengineering, KPI alignment across Sales, Marketing and Logistics, and incentive restructuring. The workbooks show concrete pieces of that operating model: standardized quote logic and formula-driven compensation analysis.

40%	QUOTE	INCENTIVE
Documented revenue increase	**Standardized sales logic**	**Scenario-based compensation**

MODEL THE RULES BEFORE CHANGING THE BUSINESS

5. Analytical Discipline

Sanitized Sales Compensation Scenario Model

Model Input	Value	Tier
Eligible Revenue Factor	85.0%	Tier 0
Current Blended Commission Rate	2.5%	Tier 1
Portfolio Note	Representative values only	Tier 2
Purpose	Demonstrate compensation scenario analysis	Tier 3

Portfolio Sanitization Notes

- Employee names and internal IDs replaced with anonymous labels.
- Customer, invoice, product SKU, and transaction-level details removed.
- Revenue figures are representative and intentionally altered from source data.
- Tier thresholds and rates are illustrative adaptations of the original modeling approach.
- Formulas remain live so a reviewer can inspect the model logic.

Figure 4. Sanitized compensation assumptions and tier structure

- Separate configurable assumptions from historical data.
- Use formulas that leadership can trace and challenge.
- Expose operational exceptions and rules instead of relying on memory.
- Model the financial impact before changing incentive structures.

PORTFOLIO SUMMARY

6. Skills Demonstrated & Takeaway

Destination State	Documentation Rule	Sales Applicability
Alabama - AL	Standard review	Confirm current exemption status
Arizona - AZ	Blanket certificate	Applicable to qualifying sales
California - CA	Standard review	Confirm current exemption status
Florida - FL	Single-purchase certificate	May vary by transaction type
Georgia - GA	Standard review	Confirm current exemption status
Illinois - IL	Single-purchase certificate	Applicable to qualifying sales
Michigan - MI	Blanket certificate	Applicable to qualifying sales
North Carolina - NC	Single-purchase certificate	Applicable to qualifying sales
New York - NY	Standard review	Confirm current exemption status
Ohio - OH	Blanket certificate	Applicable to qualifying sales
Texas - TX	Standard review	Confirm current exemption status
Washington - WA	Standard review	Confirm current exemption status

Figure 5. Representative destination / documentation rules supporting quote consistency

Sales Operations	**Microsoft Excel**	**Data Analysis**	**Revenue Analysis**	**Commission Modeling**
Scenario Analysis	**Workflow Automation**	**Process Improvement**	**KPI Alignment**	**Decision Support**

CASE STUDY TAKEAWAY

The Ricoma work demonstrates a practical Sales Operations pattern: turn messy operating rules into repeatable tools, turn compensation ideas into inspectable models, and connect both to measurable commercial performance without overstating what the data can prove.

CONFIDENTIALITY / PUBLICATION TREATMENT Employee names, internal IDs, customer / invoice data, product details, and original freight rates were removed or generalized; representative values preserve the analytical methodology.