



CompFacts

serving pay professionals since 1982

Background Information on CompFacts' Software and Services to Compensation Professionals

This document contains live Internet links to web information and downloadable files. It is therefore best displayed using a PDF file reader which supports such functionality. Please let us know if these links are not available to you and you wish to receive some or all of this information by other means.

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This document provides background information on CompFacts and is designed to facilitate web demonstrations of our software or other discussions about our services. We appreciate this opportunity and look forward to answering any questions.

Who We Are

CompFacts was started in April 1982 by Robert J. Lerner, previously a director and compensation consultant at Frederic W. Cook & Co and compensation manager at Bristol-Myers Squibb. Bob received his Bachelors degree from Cornell University and MBA from New York University. Software previously developed by CompFacts has been licensed to such firms as Ernst & Young and Andersen Consulting as their primary pay-related tool for both client consulting and licensing.

Primary Services

CompFacts provides most of its services through three proprietary software applications it developed and maintains – **Pay Integrator**, **UltraSurvey** and **Perform4Pay**.

Pay Integrator – Pay Integrator is a flexible, powerful, easy-to-use and affordable application for importing, integrating and analyzing survey and internal compensation information and producing such outputs as user-specified executive dashboard-type pay summaries and comprehensive multi-worksheet Excel workbooks.

Note: Pay Integrator is generally licensed to operate at the user's location, but where appropriate, can be used by us in an **outsourcing** arrangement to provide just the reports needed for specific one-time or ongoing compensation analyses and projects.

UltraSurvey – UltraSurvey handles all phases of state-of-the-art custom pay surveys, including survey design, participant data submission, and the viewing and analysis of custom survey results.

Perform4Pay – Pay4Perform is provided to users for short periods of time (typically one or two months) to assist in a vital and time-consuming aspect of performance-oriented pay programs – base and incentive pay performance measurement and documentation and related calculations. This easy-to-use tool provides an exceptionally quick, convenient and accurate way of performing this vital and time-consuming HR task.

Note: In cases where supervisory ratings have already been completed, the software is still useful as a payment-calculation and ratings analysis tool.

Custom Applications – Based on our compensation and software experience and extensive library of programming code, we are also able to develop custom desktop and web-based compensation-based applications quickly and inexpensively.

Pay Integrator's Key Benefits

Pay Integrator is our proprietary software allowing users to import their pay surveys and internal pay information, perform a wide range of complex and critical tasks, and output unique and valuable reports and Excel workbooks. Its key benefits include:

1. Allows wizard-based import of surveys and internal pay information
2. Allows manual entry of hardcopy survey results
3. Accommodates any type of pay form or subject, statistic and data subset
4. Provides ad-hoc competitive analyses for individual employees and jobs
5. Performs competitive analyses at the job, grade, organization and structure levels
6. Displays market dollar values in any denomination and with any aging
7. Performs year-end planning which reflects any user-specified structure configuration and employee pay action rules, and generates an editable Microsoft Word report describing the techniques, justification and dollar/demographic impact of the new structure
8. Helps assess the adequacy of survey coverage at the job, grade, structure and organization unit level
9. Provides market pay projections for unique jobs based on evaluation points
10. Estimates market consequences of changes in job evaluation
11. Helps identify potential evaluation and survey data anomalies

Links to Additional Information on Pay Integrator

- ⇒ **Main Web Site** - Pay Integrator's main website is at <http://www.payintegrator.com>.
- ⇒ **Screen Shots** - A variety of screen shots is available at <http://www.compfacts.com/integrator/screenshots/integratorscreenshots.htm>.
- ⇒ **Microsoft Excel Workbook** - One type of output is an extremely comprehensive multi-worksheet workbook containing all of an organization's key survey and internal data, competitive comparisons, trend-line analyses and graphs. It provides a convenient single source for all critical pay information. An illustrative workbook can be downloaded at <http://www.compfacts.com/integrator/IntegratorAnalyses.zip>.
- ⇒ **Executive Pay Summary** - Another type of output is a magazine-quality dashboard-style (compact, high-level and graphically-oriented) executive pay summary report – the ideal way for executives with pay management responsibility to monitor their compensation program's most critical metrics. An illustrative report can be downloaded at <http://www.compfacts.com/integrator/EPsreport.zip>.
- ⇒ **Microsoft Word Structure Adjustment Report** – A third type of output is an editable report describing the techniques, justification and dollar/demographic impact of a new pay structure created based on the user's specifications. An illustrative report can be downloaded at <http://www.compfacts.com/integrator/NewStructure.zip>.
- ⇒ **Promotional Document** – A summary can be downloaded at http://www.compfacts.com/integrator/Integrator_Promo.zip.
- ⇒ **Real-time Movie** – A movie showing Pay Integrator at work can be viewed at <http://www.paysurveys.com/Integrator/IntegratorMovie.html>.

UltraSurvey's Key Benefits

UltraSurvey is our proprietary software for handling all phases of truly next generation custom pay surveys. Its key benefits include:

1. Handles all survey steps of virtually any type survey
2. Completes surveys quickly (four to six weeks), inexpensively (a normal maximum of \$200 - \$300 per participant for any amount/type of content, number of jobs or format of results, but can be considerably less on partnered surveys) and on a risk-free basis

Note: For unusual or complex surveys UltraSurvey has not previously conducted, there is a modest non-refundable payment required before we begin customizing the software.

3. Maximizes participation by providing software-based results of unmatched convenience and usefulness and (where appropriate) potentially significant price discounts on Pay Integrator
4. Provides contamination-free results (e.g. where all market statistics exclude each participant's own data)
5. Allows participants to instantly compare their own pay against the market (at the job, grade and overall structure level), and perform comprehensive competitive, structure planning and strategic analyses, with no or minimal data re-entry or need to use Excel or any other program
6. Provides a wide range of survey results – including exceptionally comprehensive summary statistics, short and long textual information, graphs, simple and multiple regressions and tabulations
7. Allows participants to instantly specify and generate custom reports reflecting a wide range of technical choices and the most relevant labor-pool (i.e. data subset)
8. Allows participants to age market data, project market data to any relative level from 1st to 99th percentile, and determine their own percentile rank in the market
9. Does this (and much more) using software that operates quickly and conveniently as a desktop (not web) application

Links to Additional Information on UltraSurvey

- ⇒ **Main Web Site** - UltraSurvey's main website is at <http://www.ultrasurvey.com>.
- ⇒ **Screen Shots** – A wide variety of screen shots showing UltraSurvey being used by survey participants to submit data and analyze their custom results can be seen at http://www.paysurveys.com/screen_shots.html.
- ⇒ **White Paper** - A comprehensive white paper showing the advantages of UltraSurvey over other survey solutions, benefits to survey publishers, consultants, pay data exchange groups and survey participants, and the uniqueness and usefulness of its results can be downloaded at <http://www.paysurveys.com/UltraSurveyFinalNoSpecs.zip>.
- ⇒ **Survey Specifications** - UltraSurvey can be configured to handle virtually any survey need. The broad information topics, the characteristics of data fields, the covered jobs and their descriptions, the onscreen prompts, and the nature of survey results can all be customized. An UltraSurvey-generated report showing survey specifications for one specific survey can be downloaded at <http://www.paysurveys.com/ExampleSpecs.zip>.
- ⇒ **Survey Promotion** - A document for invitees to a typical geographically-oriented survey can be downloaded at http://www.paysurveys.com/Generic_Promo.zip.
- ⇒ **PowerPoint Presentation/Movie** – A combination PowerPoint presentation and real-time movie providing an overview of UltraSurvey's characteristics and benefits and how participants use it to submit their data and analyze their custom survey results can be viewed at <http://www.paysurveys.com/presentation.html>.
- ⇒ **Detail Movies** - A wide variety of movies showing detailed information on UltraSurvey being used by participants to submit data and analyze their custom results can be seen at http://www.paysurveys.com/detail_movies.html.

Perform4Pay's Key Features

Perform4Pay is our proprietary software for assisting in the performance measurement and documentation, and related pay calculation, tasks associated with base and incentive pay programs. Its key features are described below.

Note: In cases where supervisory ratings have already been completed, the software is still useful as a payment-calculation and ratings analysis tool.

Operating Modes – Perform4Pay operates in two modes – an HR setup mode in which relevant pay program and employee information is entered, and a ratings mode in which supervisors enter performance ratings and comments. A screen shot of the program in ratings mode is provided below. Access to these modes is protected by passwords which the program generates.

Process – After HR enters relevant information, the program and data files are distributed to supervisors, along with each supervisor's unique automatically-generated password. By entering this password, the supervisor will only be able to access Perform4Pay's ratings mode and information on employees who report directly or indirectly to that supervisor.

The supervisor can see each employee's individual goals and objectives for up to five separate pay plans, and enter relevant comments and ratings bearing on pay calculations instantly performed by the software.

When done, the supervisor has Perform4Pay transmit ratings and comments back to HR where they are automatically consolidated with those of other supervisors, analyzed and exported to a file suitable for payroll processing.

Pay Plans and Plan Factors – Perform4Pay can currently handle up to five separate pay plans, each having up to 30 separate factors. Each employee can be covered by different combinations of one or more of the plans. A factor is a dimension of a pay plan which usually determines a separate piece of the total calculated payment for the plan (e.g. financial performance goals of an incentive plan or personal objectives for a merit pay plan).

Perform4Pay in Action - An Illustration

The following screen shot illustrates Perform4Pay being used by a supervisor.

- The supervisor (Mr. Jones) has seven employees to be evaluated, and has selected to work on Mr. Abels. In Mr. Abels’ case there are four pay plans in place – a merit increase plan, an incentive plan (the one currently being worked on), a spot bonus plan and a stock option plan.
- The incentive plan being worked on has seven factors which determine the total payout under that plan. The second factor (described as “2005 Reliability in Customer Service Goal”) is currently being considered by referencing the instructions for that factor (the top text box) and the specific goal previously set (the middle text box).

- Additional rating assistance is provided by the Item Rating column of the employee list on the left. These show the current ratings on this factor for the supervisor's other employees, and are a useful way of helping produce consistent and valid ratings.
- The supervisor has entered a comment (the bottom text box) and a rating of 19 (bottom input field) for the factor, and is able to see the result of that rating (a calculated total incentive plan payment [which includes current ratings on the incentive plan's six other factors] of \$13,423.45).
- The supervisor is able to navigate quickly in two ways. First, he can select a specific employee (from the list on the left), plan (from the tabs above the instructions text box) and plan factor (from the buttons on the right). And second, he can go forward from one plan factor to the next, then from one plan to the next, and then from one employee to the next by clicking the Next Item button on the right.