

PRE-MIGRATION CHECKLIST

Preparing to move from SAP Commissions / SAP SuccessFactors Incentive Management to another ICM/SPM platform

Self-assessment: score each question 0–2 | 0 = No / Unknown | 1 = Partially defined | 2 = Fully defined

Purpose: this checklist is intended to help organizations inventory the key topics that should be reviewed before planning a move away from SAP Commissions. It is designed to be broad enough for target-platform-agnostic planning, while remaining grounded in SAP Commissions realities that are publicly documented or widely recognized across the ecosystem.

Important note: some items below are direct platform- or migration-related considerations. Other items are recommended transition-planning topics that help reduce execution risk even when they are not described by SAP as a formal migration checklist.

1. CURRENT LANDSCAPE INVENTORY

- Do you have an inventory of the SAP Commissions environments involved in the move and the surrounding technical components used to run them?
- Have you documented which capabilities currently sit inside SAP Commissions and which depend on external tools, services, file exchanges, or reporting layers?
- Do you know which environment-specific settings, credentials, schedules, file locations, endpoints, and technical users will need to be recreated or replaced?

2. PLAN OBJECTS & COMPENSATION MODEL

- Do you have a complete inventory of plans, positions, quotas, territories, rate tables, lookup tables, fixed values, variables, and other compensation elements used in the current design?
- Can each plan be explained as a sequence of business objects and calculation layers rather than only as system behavior?
- Have you identified plan variants, exceptions, guarantees, draws, retro rules, overrides, and local differences that materially affect payout logic?
- Have you identified objects or plan elements that are obsolete and should not be carried forward?

3. RULES, PIPELINES & EXECUTION ORDER

- Do you understand how the current rules and pipeline stages execute end-to-end, including stage dependencies and sequence-sensitive logic?
- Is the ruleset documented in a way that allows validation outside the system?
- Have you identified logic that depends on platform-specific behavior, workaround design patterns, or tightly coupled processing order?

4. DATA DOMAINS, KEYS & SOURCE-OF-TRUTH

- Have you mapped the core inbound data domains required by the current SAP Commissions design, such as payee or employee data, hierarchy data, quota data, territory data, product or customer reference data, transaction data, and credit-related data?
- Is there a clear source of truth for each major data element?
- Do you know where data quality problems are currently corrected: upstream systems, data preparation layers, workflow/manual processes, or SAP Commissions itself?

- Have you documented key joins, keys, mappings, effective-dating logic, and reference-data dependencies required to rebuild the data model elsewhere?

5. PRE-PROCESSING / ETL LAYER

- If your SAP Commissions environment includes a separate data preparation or ETL layer, have you inventoried the objects, schedules, dependencies, transformations, and control mechanisms it performs before data reaches SAP Commissions?
- Do you know which transformations in that layer are business-critical versus simply historical technical design choices?
- Have you identified cleansing, enrichment, aggregation, deduplication, sequencing, and exception-handling logic currently performed before calculation?

6. INTEGRATIONS, FILE FEEDS & APIS

- Do you have a full inventory of inbound and outbound interfaces, including file feeds, SFTP exchanges, manual file imports, API-based integrations, middleware flows, and downstream consumers?
- Have you documented interfaces to systems such as CRM, ERP, HRIS, payroll, planning, reporting, identity, or data platforms, including integration frequency and ownership?
- Do you know which interfaces are required for day-one go-live and which can be phased later?

7. STAGE HOOKS, SQL & CUSTOM TECHNICAL EXTENSIONS

- Are Stage Hooks, stored procedures, SQL/PL-SQL logic, scripts, or other custom technical extensions in use anywhere in the current solution?
- Have you identified where custom logic is being used for validation, enrichment, exception handling, reporting support, or business-specific processing?
- Can that logic be re-expressed in a target-platform-friendly form, or is it tightly coupled to the existing technical stack?
- Have you estimated the amount of manual rewrite and testing required for those technical extensions?

8. WORKFLOWS, APPROVALS & CASE HANDLING

- Have you mapped workflow scenarios, approvals, dispute handling, exception routing, and any operational sign-off steps tied to compensation processing?
- Do you know which workflows depend on script logic, SQL procedures, API calls, or database references?
- Have you identified any historical case or approval information that must remain accessible after the move?

9. MANUAL ADJUSTMENTS, DISPUTES & OFF-SYSTEM OPERATIONS

- Have you documented manual adjustments, overrides, dispute-resolution steps, releases, approvals, and any payout-impacting work performed outside the core calculation flow?
- Do you know which recurring manual activities are caused by data issues, plan design weaknesses, control requirements, or platform limitations?
- Is there an audit trail for the off-cycle and manual activities that materially affect pay?

10. REPORTING, STATEMENTS & ANALYTICS

- Do you have an inventory of compensation statements, operational reports, dashboards, analytics assets, extracts, and any field-facing or administrator-facing outputs used today?
- Have you documented how each critical output is sourced and calculated, including dependencies on dashboards, embedded analytics, custom data models, or older reporting layers?

- Have you identified which outputs are mandatory for legal, financial, audit, or operational reasons versus merely convenient?

11. HISTORY, ARCHIVE & RECONCILIATION

- Have you defined how much history must be migrated, how much can be archived outside the target platform, and what may be left behind?
- Can you reproduce prior-period payouts with enough confidence to support reconciliation, disputes, or audits?
- Have you defined how legacy outputs will be compared with target-platform outputs during testing and cutover preparation?

12. SECURITY, ACCESS & IDENTITY

- Have you inventoried users, roles, visibility rules, approval authorities, technical users, report access patterns, and service-account dependencies?
- Do you know which identities and assignments are managed directly in SAP Commissions and which come from upstream identity or provisioning processes?
- Have you identified authentication, provisioning, and access-control dependencies that must be recreated in the target-state design?

13. PAYROLL, ACCOUNTING & DOWNSTREAM HANDOFFS

- Have you documented payroll calendars, cutoff dates, payment-file dependencies, accounting/journal exports, and downstream finance handoffs linked to compensation results?
- Do you know which outputs must feed payroll, accounting, settlement, or related downstream processes and in what form?
- Have you identified reconciliation controls required between compensation results and downstream financial or payroll systems?

14. TEST DATASET & VALIDATION READINESS

- Do you have a representative test dataset that covers standard scenarios, known exceptions, retroactive changes, reversals, hierarchy changes, territory changes, and manual interventions relevant to your current landscape?
- Have you identified the business and technical owners responsible for validating plans, rules, data, workflows, reports, statements, and payout results?
- Is there a defined expected-results baseline for the most critical plans and periods?

15. PERFORMANCE, VOLUME & PERIOD-CLOSE PRESSURE POINTS

- Do you understand the largest performance-sensitive areas in the current environment, such as Stage Hooks, pipeline processing, report generation, data extracts, data imports, or inbound data preparation?
- Have you identified volume-sensitive jobs, close-window bottlenecks, and reporting or extraction loads that should influence target-state design?
- Do you know which processing windows are operationally critical for your business?

16. SUPPORT MODEL & REQUIRED SKILLS

- Do you know which specialist skills are currently required to support the existing SAP Commissions landscape, such as platform administration, SQL, scripting, data integration, workflow support, or reporting support?
- Have you identified which of those skills remain relevant after migration and which new capabilities will be required in the target environment?

- Is there clear ownership for business decisions, technical design, integration dependencies, validation, and cutover preparation?

17. RECOMMENDED TRANSITION-PLANNING TOPICS

- Have you defined how you plan to validate outputs during the transition, for example phased validation, side-by-side comparison, or another controlled approach?
- Do you know how disputes, adjustments, statements, and payroll handoff will be managed during the transition period?
- Have you identified business-continuity risks in case reconciliation or validation is delayed?

SCORING SUMMARY

Add up your total score and use the ranges below as a rough readiness signal. A high score does not remove the need for design work; it indicates that the current landscape is better understood.

Total score	Readiness signal	Interpretation
0–35	High risk	Major parts of the current landscape are not yet understood or documented. Start with inventory and dependency mapping.
36–60	Partial readiness	Core areas are known, but technical and operational gaps could create surprises during migration planning.
61–85	Good readiness	Most major dependencies are identified. Remaining work is usually around validation depth, history, and transition planning.
86+	Strong readiness	The organization has a well-understood baseline for target-state design, vendor evaluation, and detailed migration planning.

COMMON RED FLAGS

- Business logic exists mainly inside rules, SQL, Stage Hooks, scripts, or individual operator knowledge instead of maintainable documentation.
- A separate data-preparation layer performs critical transformations that business owners cannot clearly explain.
- Historical payouts cannot be reproduced with confidence.
- Manual adjustments, disputes, or spreadsheet operations materially affect payout accuracy or period-close timing.
- Critical statements or reports are trusted operationally, but no one can clearly trace how they are assembled.
- Too many day-one integrations are assumed to be straightforward rewrites without detailed analysis.