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Stock Focal: Managing Stock Allocations using Oracle Compensation Workbench v.R12

Timothy Walsh

NorCal OAUG Training Day

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Northern California OAUG

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Program: Agenda

1. Introductions
2. CWB Overview
3. Implementing Stock Plan in CWB
   - Planning
   - Building Blocks
   - Challenges & Other Considerations
   - Benefits
   - Lessons Learned
4. About Jade Global
5. Q & A

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Introductions

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CWB Overview

Oracle's Compensation Workbench (CWB) provides your enterprise with a web–based solution for determining and allocating compensation awards, including:

- Salary increases
- Bonuses
- Stock options

Implementing a Stock Plan

- Planning your Equity Compensation
  - Local or Global in design?
  - Who is eligible? (Eligibility Criteria)
  - What are the periods/frequency for each?
  - What are the limits, minimum/maximums?
  - What if any, recommendations are required?
  - What tasks can a manager perform?

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Implementing a Stock Plan

- Planning your Equity Compensation
  - Can a manager reserve shares for later?
  - At what level are allocations allowed?
    - line manager, directors, VPs
  - Who will be distributing the budget?
  - What data do you want to capture in the database?
    - Grants, Price, effective date, vesting date, vesting schedule
  - What information does the managers need to make a decision?

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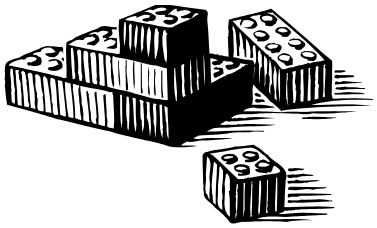
Implementing a Stock Plan

- Setup Building Blocks
  - Define elements to hold each distribution
  - Define FastFormulas for calculations
  - Define eligibility profiles
  - Define Life Event(s)
  - Define plan type (Stock)
  - Define the plan(s)
  - Define plan enrollment requirements
  - Define standard rates
  - Enable SSHR menus / Worksheet personalization's



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Stock Plan Challenges

- Stock Element Definitions
- FastFormulas
- Posting of Stock values
  - Use FastFormulas to define extra input values
- If you are using Standard Benefits or ICD make sure that all unrestricted Life Events are closed before running participation process.

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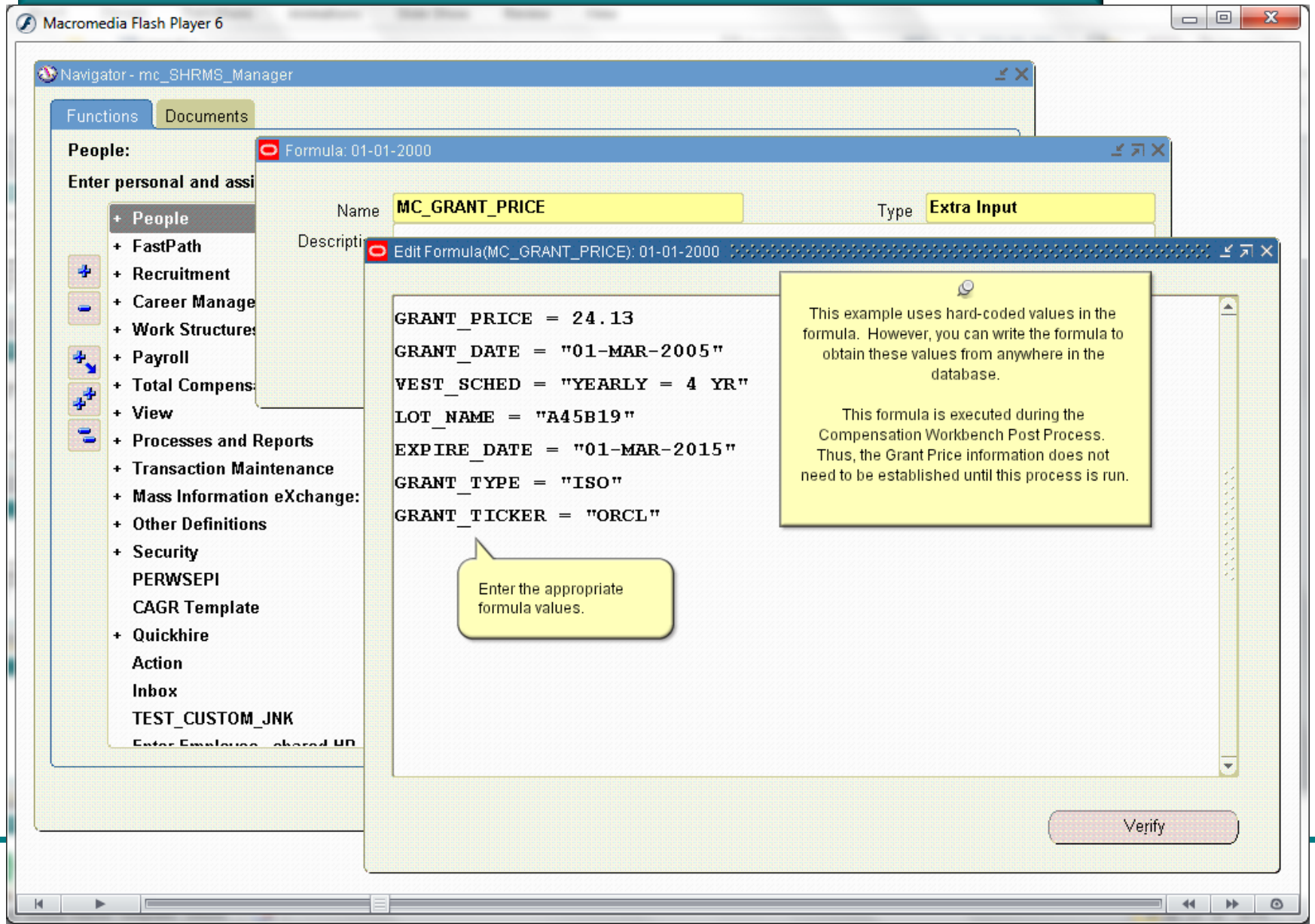
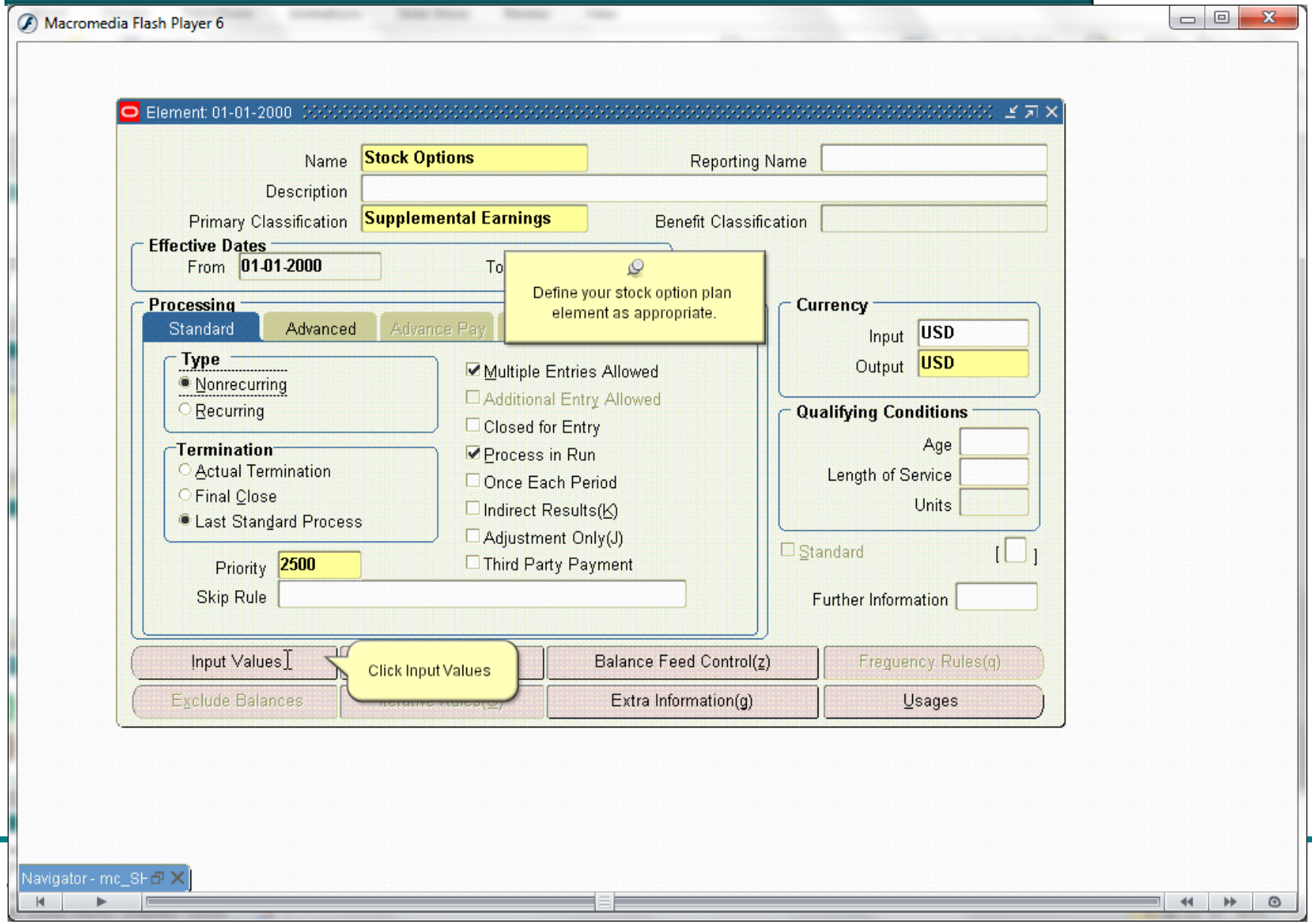
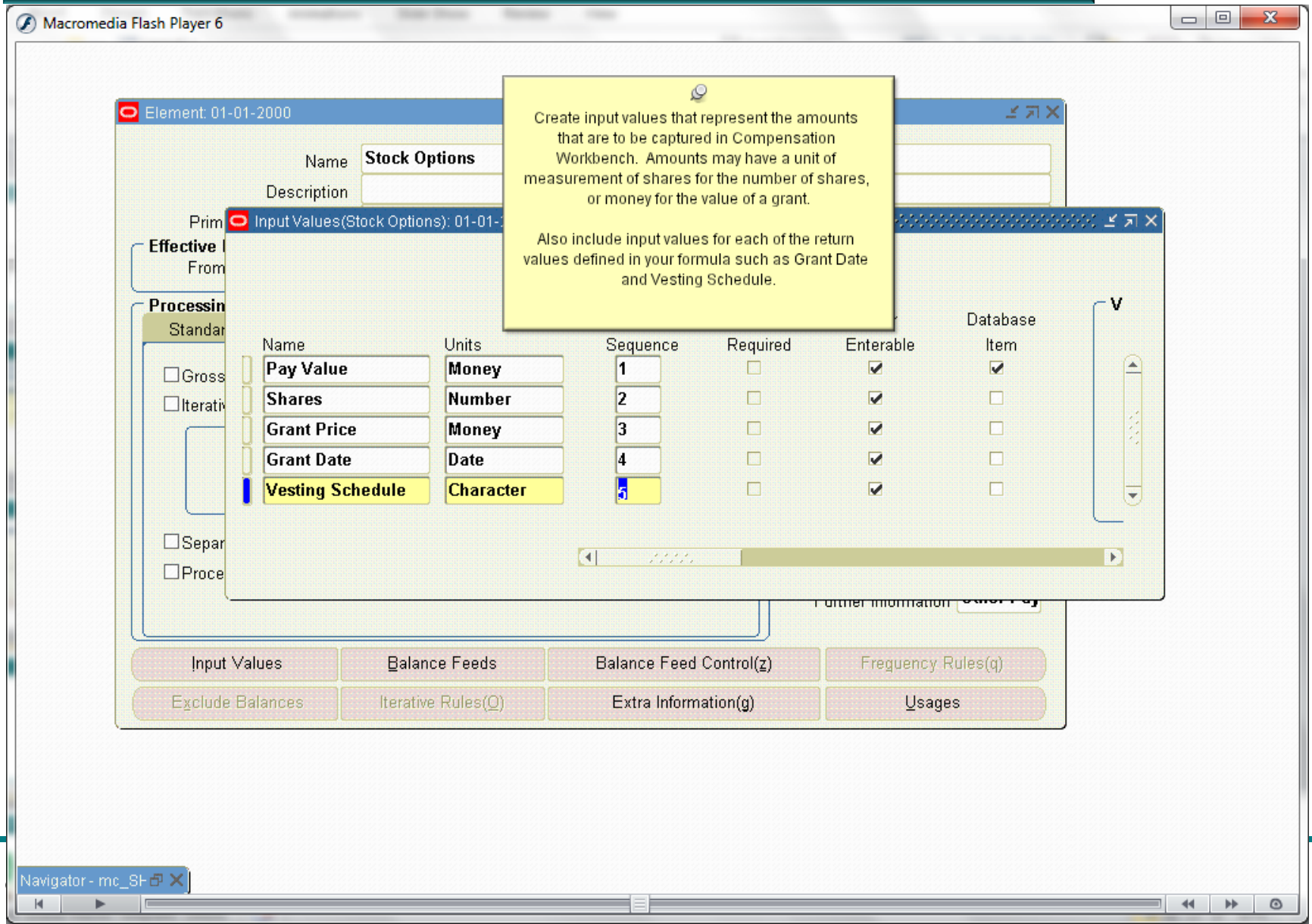
Stock FastFormula



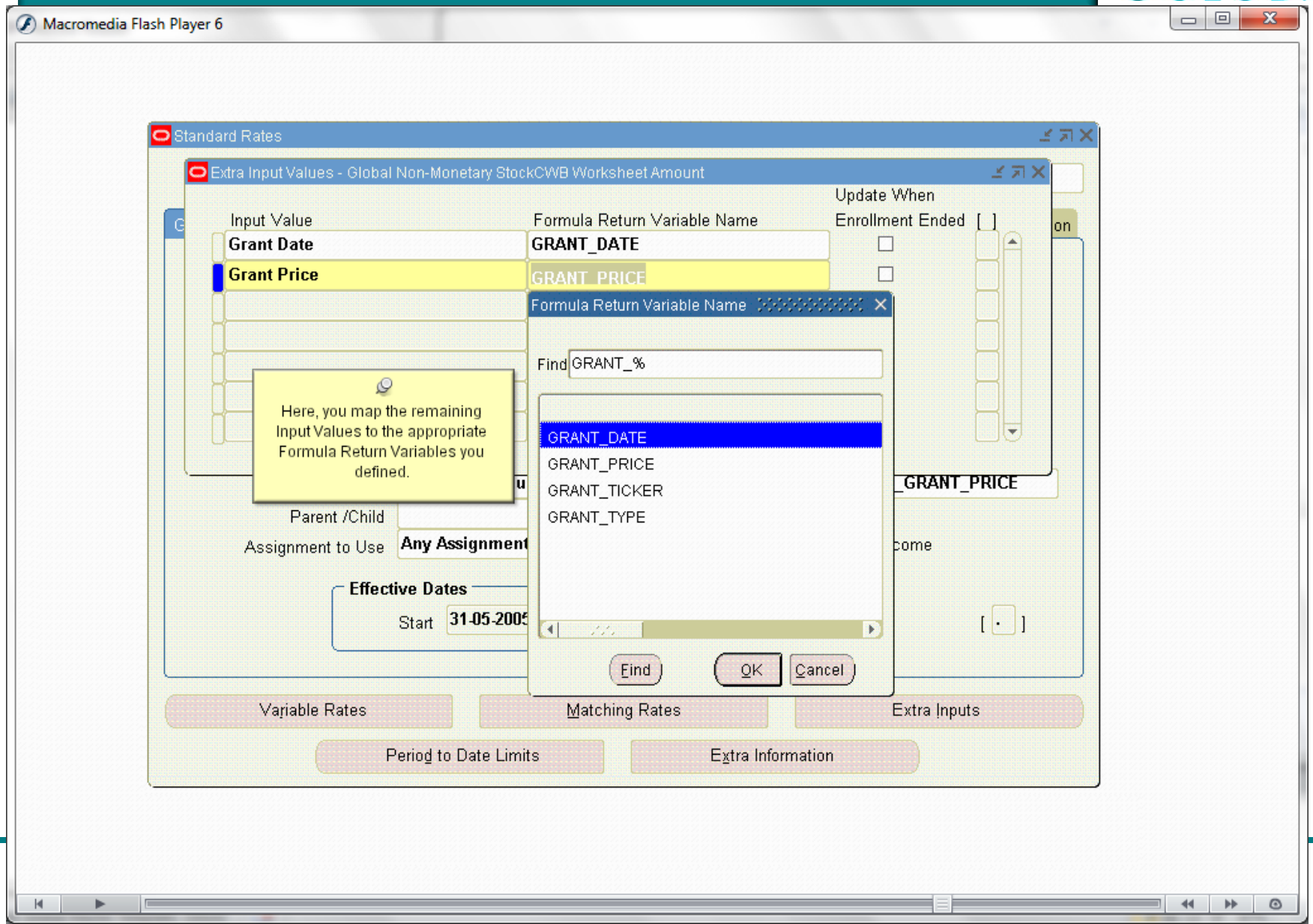
Stock Element



Stock Element



Stock Standard Rate Extra Inputs



Stock Plan Other Considerations

- Manager's Worksheet Layouts
- Global vs. Local recommendations
- Reserves
- Employee Statements
- Reports

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CWB Stock Plan Benefits

- Distributing compensation management to line managers
- Manager’s have better visibility into how their employee's are compensation
- Online reporting in CWB
- Better management/controls over approval processes
- Avoiding Excel based processes (Go Paperless)
- Data available for reporting, budgeting, costing

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Lessons Learned

- Must plan your cycle to include Board approval times
  - Comp Admin's change window, posting dates, etc.
- Define a separate Life Event for each Stock plan to avoid a overlapping issues.
  - Executive plan vs. IC plans
- With multiple business groups, define one Global plan and multiple local plans for each business group
- Use plan design copy feature if your defining multiple Stock plans.
- Use plan export/import feature to migrate plans between instances.
- Oracle's CWB viewlets provide additional & helpful information.

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Q&A

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