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Sales Incentive Scheme

Banking, Finance & Fintech

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This guide explains what the tool produces, how to use the output, and what to watch for. The actual output (draft/report) is generated on the tool page.

Background

Designs a sales incentive scheme that rewards good sales without encouraging mis-selling — basis (AUM or book growth, persistence, client satisfaction, quality not just volume), payout slabs, and clawbacks for mis-selling or early lapse, with suitability and conduct gates. Use this to motivate the team while protecting clients.

Purpose of this tool & output

Reward sales without mis-selling

How the output is used

Use the designer to reward sales without mis-selling, balancing volume and suitability.

Important cautions

AI-generated scheme; design to discourage mis-selling and align to conduct rules.

Companion documents

- BFSI Hiring Kit
- Advisor / RM Training Program
- Certification & Licensing Guide
- Conduct & Ethics Policy
- Performance Review Kit
- Attendance & Leave Policy

This is AI-assisted guidance. Verify with a qualified professional before any binding decision. Fees, authorities and processes vary by state and change over time — confirm with your state authority.