



KF PAY DATA COLLECTION TOOL (DCT)

User Guide

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Overview

What is the Data Collection Tool?

The Data Collection Tool (DCT) is a secure online platform hosted on KF Pay which allows you to submit data quickly and efficiently in the same environment as your KF Pay reports and analyses.

User Guide

The following user guide provides in-depth instructions on how to use the DCT. If your organization previously submitted data, some of the sections will remain filled. For example, the Onboarding Survey will remain pre-filled and ready for the current year even if it's managed by your organization's headquarters.

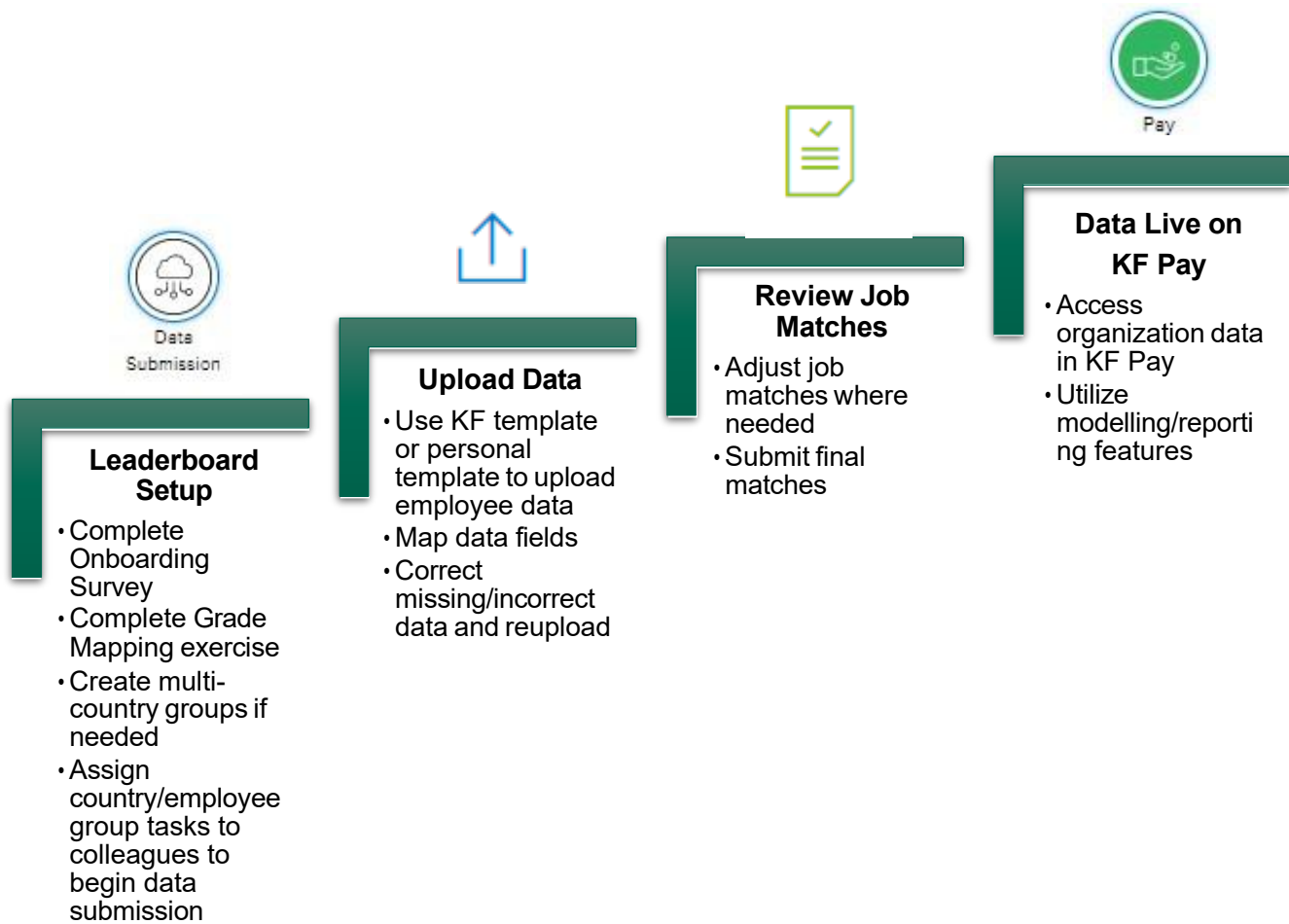
Before you begin, we suggest using Google Chrome browser and whitelisting these email addresses so that they are not directed to your junk folder:

- activate@kornferry.com (for EU server clients)
- noreply@kornferry.com (for US server clients)

We are working closely with clients to ensure the tool is performing and we welcome any feedback for improvements. The DCT is regularly updated, and client feedback is crucial to tailoring the tool to meet everyone's data submission needs.

Should you experience any difficulties with your data submission, please do not hesitate to contact your Korn Ferry account manager.

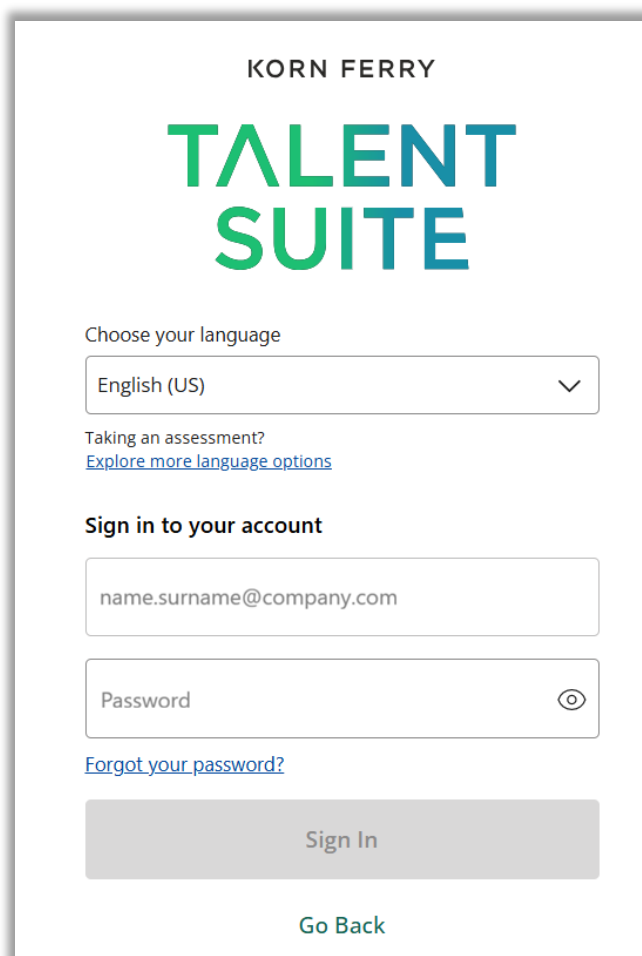
Key Milestones



Logging Into Talent Suite

Log in details for the Talent Suite will be provided by Korn Ferry through your welcome email. If you have forgotten your password, click on 'Forgot your password?' and follow the prompts to reset your password. If you did not receive a welcome email with your credentials, please contact your Account Manager for assistance.

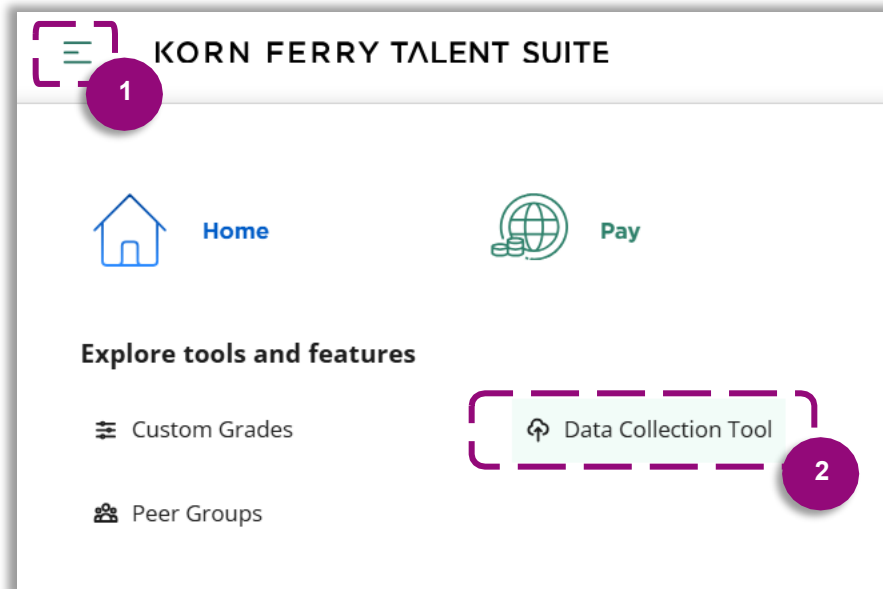
Google Chrome is the recommended browser for Talent Suite.



The screenshot shows the login interface for Korn Ferry Talent Suite. At the top, the text 'KORN FERRY' is centered above the large, stylized logo 'TALENT SUITE'. Below the logo, there is a section for language selection with the text 'Choose your language' and a dropdown menu currently set to 'English (US)'. A link for 'Taking an assessment? Explore more language options' is provided. The main section is titled 'Sign in to your account' and contains two input fields: one for an email address (pre-filled with 'name.surname@company.com') and one for a password (with a toggle icon). A 'Forgot your password?' link is located below the password field. At the bottom of the form, there is a large grey 'Sign In' button and a 'Go Back' link.

How to Access

Once logged in, click on the 'Menu', and locate the 'Data Collection Tool' button which will allow you to submit your organization's data. If for any reason you do not see the 'Data Collection Tool' icon, please contact your Account Manager.



Throughout the data submission process, a 'Help' icon will appear where quick tips are available. Click on the icon to expand the panel for tips on how to complete the actions requested on the page.



Organization Data

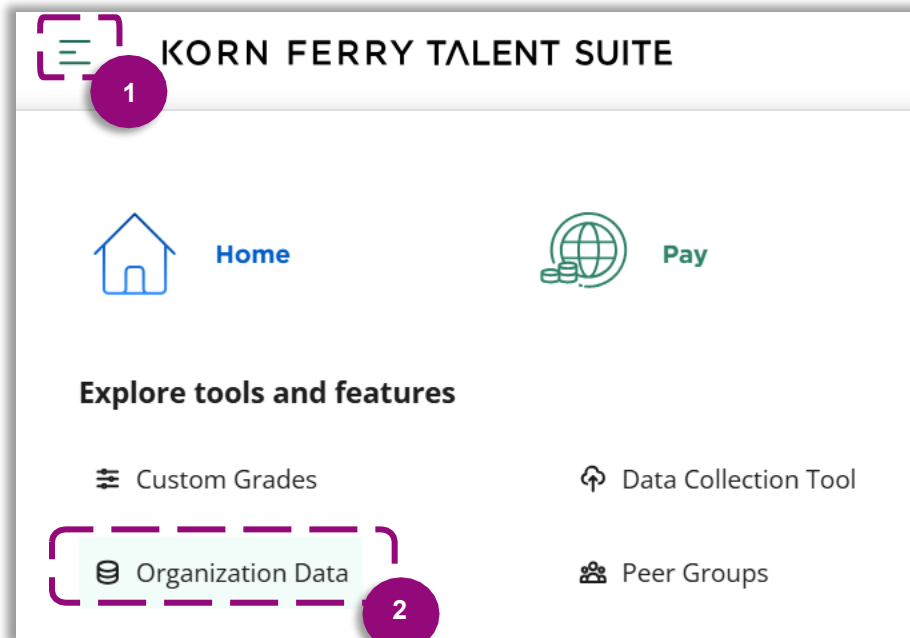
Assigning Organization Data

The Organization Data screen gathers the necessary information to create a profile of your company, allowing us to accurately categorize it in our databases. The information collected also feeds into the artificial intelligence used in the tool for quality assurance and to make the data submission process as smooth as possible.

To access the Organization Data section, once you are on the Data Collection Tool screen, click the link at the top left of the page:



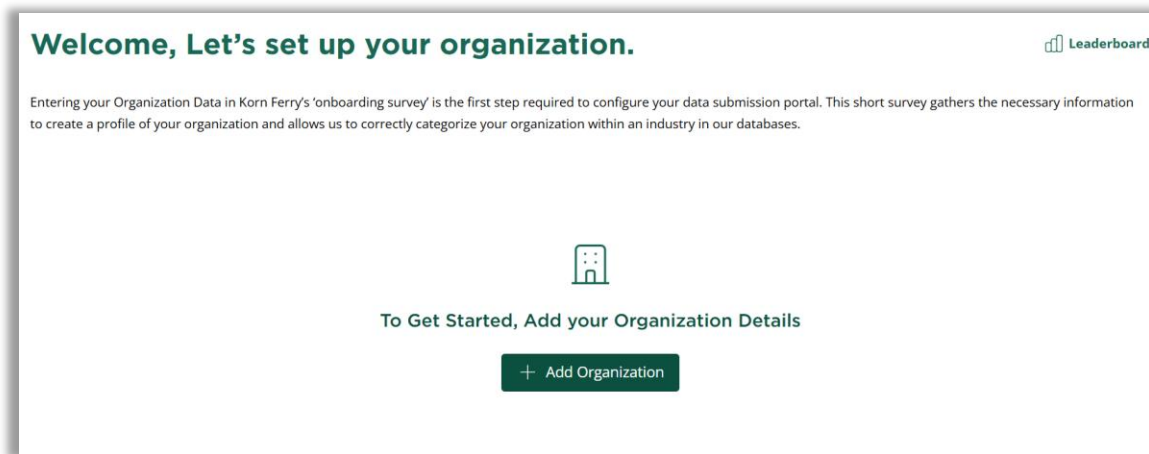
Alternatively, click the MENU button in the upper left corner and select 'Organization Data'.



Accessing the Onboarding Survey

To begin the onboarding process, select 'Add Organization' from the welcome screen. You will be guided through a structured setup consisting of:

- Add Parent Organization
- Add Subsidiary Organization (if applicable)
- Review Summary



Step 1: Add Parent Organization

You will first complete the Organization Details section for the Parent Organization. This information is required to correctly configure your data submission environment and categorize your organization within Korn Ferry's databases.

An information icon is available next to each field. Hover over the icon to view additional guidance explaining the information required.

Once all required information has been entered, select Continue to proceed to the next section of the onboarding workflow.

Add Parent Organization

Get started by adding your organization details. Ensure all fields are completed for a successful submission of compensation data.

Organization Details

Parent Organization Name*

Currency Total Global Revenue

Industry Total Global Assets

Industry Segment Market Capitalization

Exit Survey Back Continue

Operating Countries

After completing Organization Details, you will be prompted to add Operating Countries.

You must include at least one country where your organization operates.

To add additional countries, select 'Add Another Country'.

Alternatively, you may use the 'Bulk Upload Countries' option to upload multiple countries at once.

Add Parent Organization

Get started by adding your organization details. Ensure all fields are completed for a successful submission of compensation data.

Operating Countries + Add Another Country

Please provide information about the countries where your organization operates. You must include at least one country and provide organization mapping to prepare your data for submission.

Country	Organization Mapping	Revenue	Currency	Headcount	Data Submission Method
<input type="text" value="United States..."/>	<input type="text" value="No Match"/>	<input type="text" value="600,000,000"/>	<input type="text" value="US Dollar"/>	<input type="text" value="6,000"/>	<input type="text" value="Manual"/>

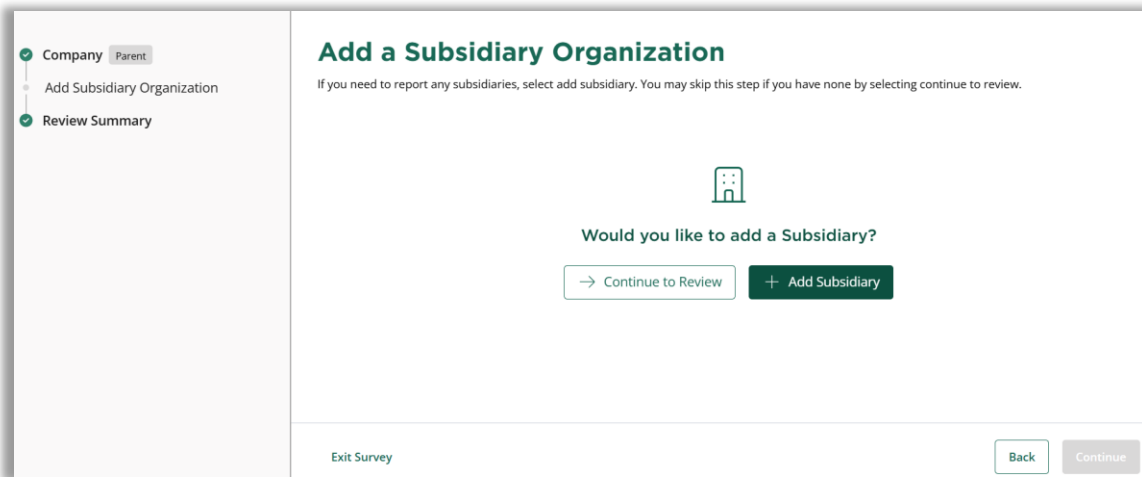
Alternatively, you can click the button below to upload your countries in bulk.

+ Bulk Upload Countries

Exit Survey Back Continue

Step 2: Add Subsidiary Organization (If Applicable)

After completing the Parent Organization setup, you will be prompted to add subsidiary organizations.



If your organization includes subsidiaries, select 'Add Subsidiary'. Complete the required information under Organization Details and Operating Countries.

You may repeat this process to add additional subsidiaries, if applicable.

If no subsidiaries need to be added, or once you have finished adding them, select 'Continue to Review' to proceed to the final step.



It is important to map your organization correctly to any data you have submitted previously. This will help the AI generate better matches to Korn Ferry roles. Under 'Map my Organization', select your organization's name from the menu. **If you select 'No match', your data will not be linked, and you will not be able to use the full potential of our KF Pay reporting.** If you are participating in our survey for the first time, you can click 'No match' as it is not possible to link your data.

Add Subsidiary Organization

Next, add your subsidiary organization details. Ensure all fields are completed for a successful submission of compensation data.

Operating Countries + Add Another Country

Please provide information about the countries where your organization operates. You must include at least one country and provide organization mapping to prepare your data for submission.

Country	Organization Mapping	Revenue	Currency	Headcount	Data Submission Method
Canada	No Match	400,000	US Dollar	4,000	Manual

Alternatively, you can click the button below to upload your countries in bulk.

+ Bulk Upload Countries

Exit Survey Back Continue

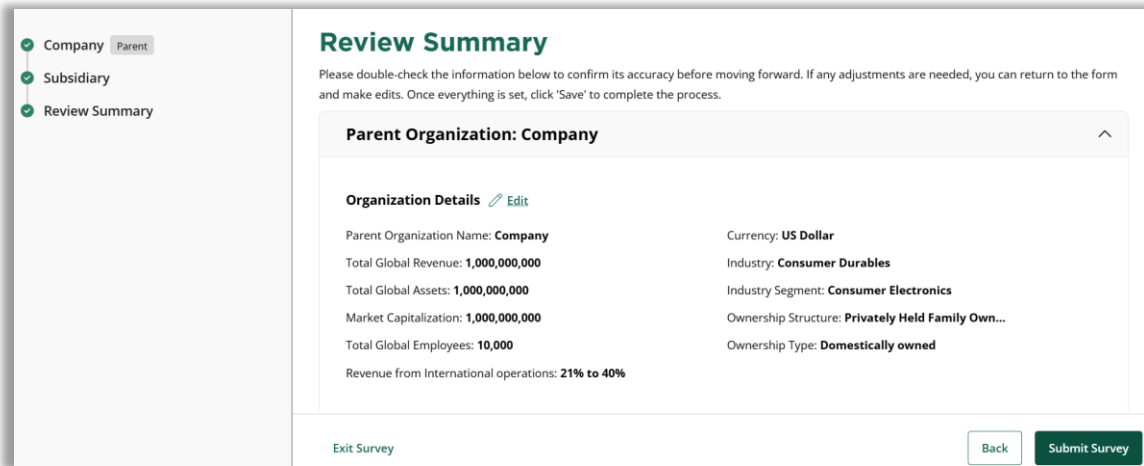
Step 3: Review Summary

The final step is the Review Summary page. This page provides a consolidated overview of all information entered for:

- Parent Organization
- Subsidiaries (if added)
- Operating Countries

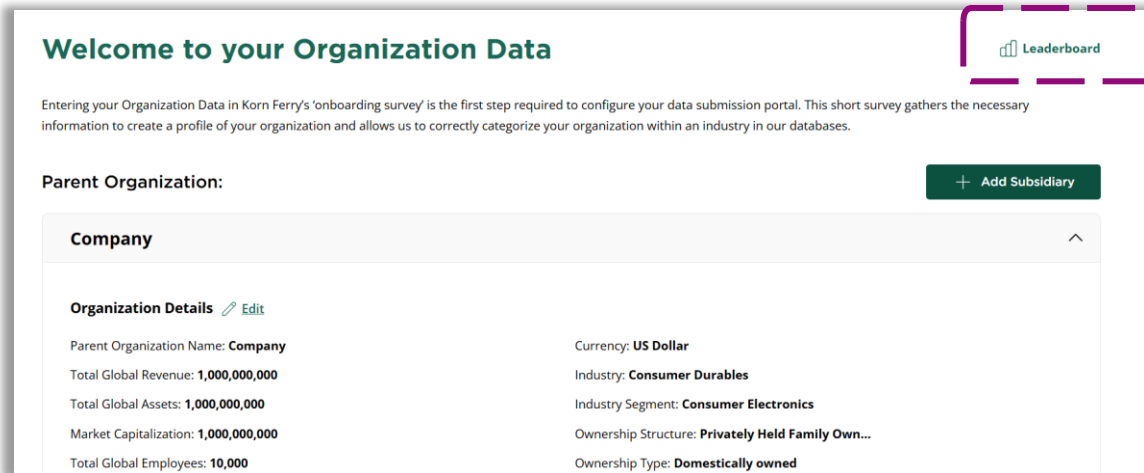
Carefully review the details to confirm accuracy. If changes are required, select 'Edit' to return to the relevant section.

Once all information has been validated, select 'Submit Survey' to complete the onboarding process.



A confirmation message will appear indicating that your organization data has been successfully created.

Once you are back on the welcome screen, which now features a summary of your organization, click on the Leaderboard at the top of the screen to initiate your data submission.



Adding Multiple Countries

If you would like to upload multiple countries at once, rather than adding them individually, you can click on the 'Bulk Upload Countries' button. You will be directed to the page where you can download a template. After you fill the excel template with all information for your relevant countries, you can easily upload it back by dragging and dropping the file or clicking on the button 'Choose a file'.


Company

Get started by adding your organization details. Ensure all fields are completed for a successful submission of compensation data.

Operating Countries

[+ Add Another Country](#)

Please provide information about the countries where your organization operates. You must include at least one country and provide organization mapping to prepare your data for submission.

Country	Organization Mapping	Revenue	Currency	Headcount	Data Submission Method
United States... ▾	Company ▾	600,000,000	US Dollar ▾	6,000	Manual ▾ 

Alternatively, you can click the button below to upload your countries in bulk.

[+ Bulk Upload Countries](#)

Bulk Upload Countries


Step 1. Download Template

Click the button below to download the template. You may leave rows blank where your organization does not have data.

[Download](#)

Step 2. Upload New File

A successful upload will automatically populate your organization. If the upload fails you will have the ability to download the file and fix the errors.



Drag & Drop here or [choose a file](#)

Accepted file types .xls, .xlsx

[Cancel](#) [Submit](#)

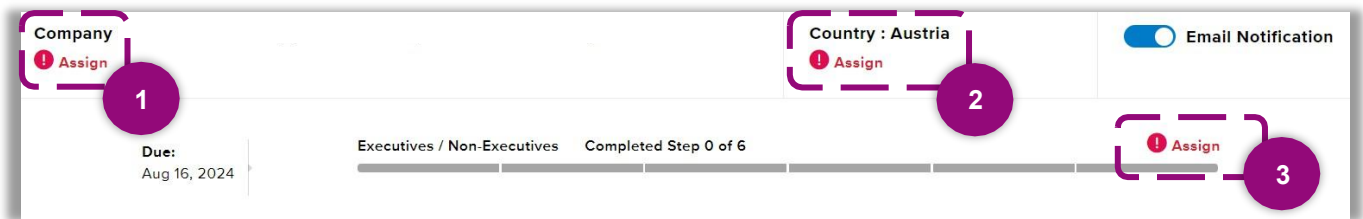
After the upload, the selected countries will be added to your Organization Data.

Assigning Tasks

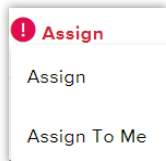
Once the Onboarding Survey has been completed, the Leaderboard will be generated based on the Parent Organization, Subsidiaries, and Operating Countries configured during setup.

Each country or group created during onboarding will appear as a separate task on the Leaderboard. These tasks can then be assigned to yourself or to other users within your organization.

You can assign a task for specific Company [1] or Country [2] as an indication these are your responsibility to upload (e.g. when there are more users in the company). To initiate upload of specific data, you must assign the individual task [3].



You can assign any task to you or to someone else under the 'Assign' button.



All tasks assigned to yourself can be found at the top of the Leaderboard. To assign a task to someone else you will be prompted to fill this form:

Assign Someone

What level do you want to assign?

Company

Data Type

Country

Company

Who are you assigning it to?

Select User

Cancel Select User

You can choose existing user or create a new one at the last dropdown of the form:

Who are you assigning it to?

Select User

Search

Create New User

To create a new user, fill in the form and click 'Create New User' button:

Create New User

First Name: name

Countries: Austria

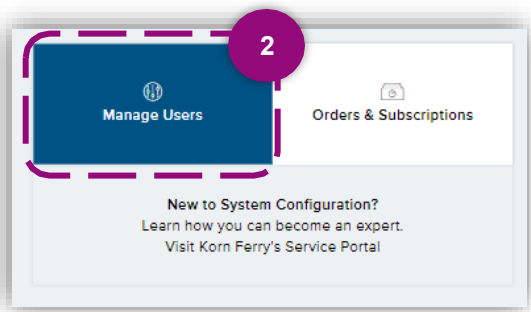
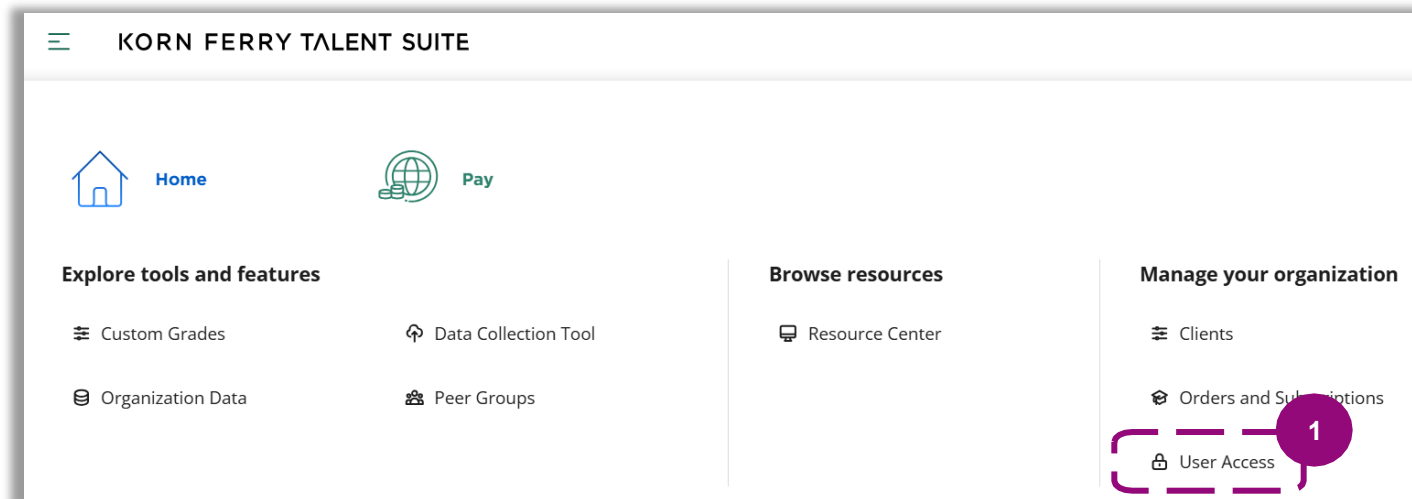
Last Name: surname

Email: name@company.com

Cancel Create New User

Manage Users

If you need to manage existing user access or create a new user, click on the waffle menu in the top left corner. Then select 'User Access' and click on 'Manage Users'.



You will see existing users here and you can change their accesses if you are admin user.

User levels:

- Client Admin User can view the entire Leaderboard and assign tasks.
- Product User will only be able to view and upload for tasks that they are assigned to.

You can also 'Add User' at the top of the page. Fill out the required fields and enable the 'Organizational Data Collection' for the new user. Once all details are entered, hit 'Save'. This user is now active and can be assigned to tasks on the Leaderboard.

ADD USER

Cancel
Save

Create a user with the same, or fewer, permissions than you have

User Information

First Name <input style="width: 90%;" type="text"/>	Last Name <input style="width: 90%;" type="text"/>	Email Id <input style="width: 90%;" type="text"/>	Job Title <input style="width: 90%;" type="text"/>
Location <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;">Select Location ▼</div>	Language <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;">English ▼</div>	User Level ⓘ <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;">Select User Level ▼</div>	Team ⓘ <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;">Select Team ▼</div>
Client Unique ID <input style="width: 100%;" type="text"/>			

Permissions

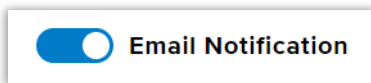
Organizational Data Collection

NOTICE: When ODC access is turned on, users with the User Level 'Product User' will only be able to see and complete upload tasks that are assigned to them on the Data Collection leaderboard. They cannot assign any tasks. Users with the User Level 'Client Admin User' will see the entire leaderboard, regardless of country level. Pay permissions that have been set. They will also be able to assign tasks to other users in their organization.

Save

Task Email Notifications

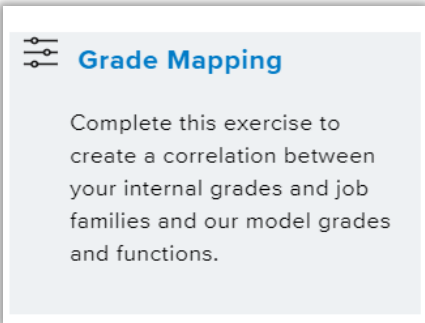
In addition to assigning tasks, there is an option to enable or disable email notifications for each country/multi-country group. Email notifications are sent throughout the process to update the assigned person of any uncompleted/completed tasks. You can switch on/off notifications by this toggle next to any task:



Grade Mapping

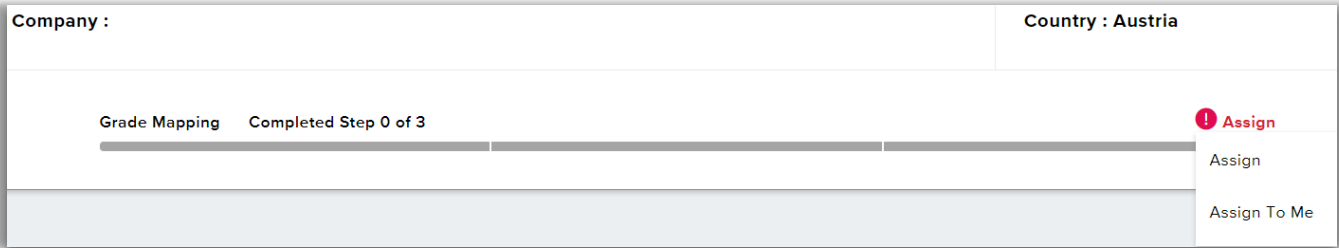
If you indicated that your organization uses an internal grading structure on the Onboarding Survey, a Grade Mapping exercise will present on the Leaderboard. Grade Mapping is intended to provide additional data for the AI to make more confident predictions.

Grade Mapping exercise can be accessed through the upper menu:



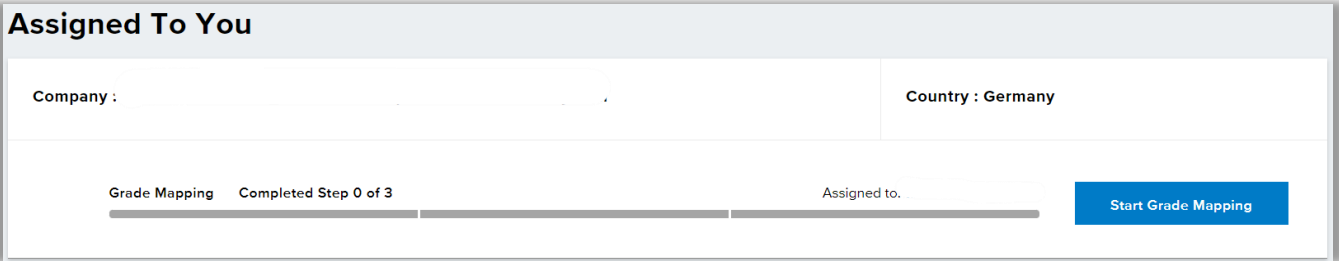
A menu item for 'Grade Mapping' with a gear icon. The text below the icon reads: 'Complete this exercise to create a correlation between your internal grades and job families and our model grades and functions.'

Start by assigning yourself (or other user) to the Grade Mapping task.



A screenshot of the task assignment interface. It shows a header with 'Company :' and 'Country : Austria'. Below this is a progress bar for 'Grade Mapping' showing 'Completed Step 0 of 3'. To the right of the progress bar is a red 'Assign' button with an exclamation mark icon. Below the 'Assign' button are two more buttons: 'Assign' and 'Assign To Me'.

The task assigned to yourself will be generated at the top of Grade Mapping page. Hit 'Start Grade Mapping' button.



A screenshot of the 'Assigned To You' section. It shows a header with 'Assigned To You'. Below this is a card with 'Company :' and 'Country : Germany'. Below the card is a progress bar for 'Grade Mapping' showing 'Completed Step 0 of 3'. To the right of the progress bar is the text 'Assigned to:' followed by a dropdown menu. Below the dropdown menu is a blue 'Start Grade Mapping' button.

An overview of why grade mapping is beneficial and how it is used to assist the AI is provided in the next step. Hit 'Begin Grade Mapping' button to begin.

The first step is to review your organization data that was filled in during the Onboarding Survey and confirm that it is accurate. This allows us to anchor the top of your organization within our job model from a job size perspective. Hit next once validated.

The exercise will now ask you to grade a set of success profiles starting with Executives followed by Non-Executives. Each Success Profile will have a job title and description which you will need to review and discern which job family and grade level that individual would be classified under should they exist within your organization. Again, this is a theoretical exercise to help the AI make better predictions. Once all grades have been entered, hit 'Submit' and confirm that you would like to exit Grade Mapping and return to the Leaderboard.

Step 3 - Grade Your Non-Executives

Please review the below job content and use the response fields on the right to enter the values associated with this role in your organization. If the role doesn't exist in your organization, please provide the values that would be assigned if it did. To see more detailed information about this role, use the 'View Full Profile' link.

25% Complete

Financial Analyst II

6 of 30 profiles

[View Full Profile](#)

Responsibilities

- Develops and/or delivers a plan for significant aspects of the financial management and/or control process.
- Builds own capabilities and develops the capabilities of direct reports by working within existing development framework; provides specialized training or coaching in area of expertise to others throughout the organization.
- Supports small internal customers to ensure their needs are met and/or helps senior colleagues manage client relationships.
- Conducts research using primary data sources and selects relevant information to enable analysis of key themes and trends.
- Delivers prescribed outcomes by working as directed within established data management systems and procedures.
- Executes a communications plan by working within established internal communication systems and procedures.
- Delivers outcomes by managing others and working within established systems.
- Provides input into the development of procedures for an area within the organization, then monitors the implementation of those procedures.

Korn Ferry Job Family

Finance and Accounting

Your Job Family

Korn Ferry Grade

16

Your Grade

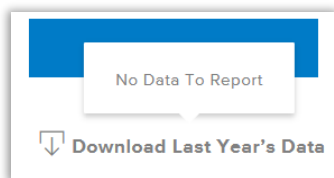
Submitting Data

Downloading a Template

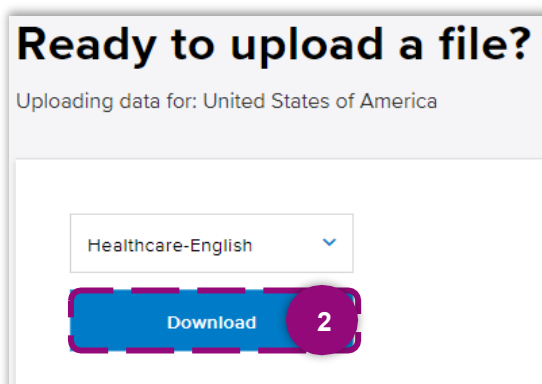
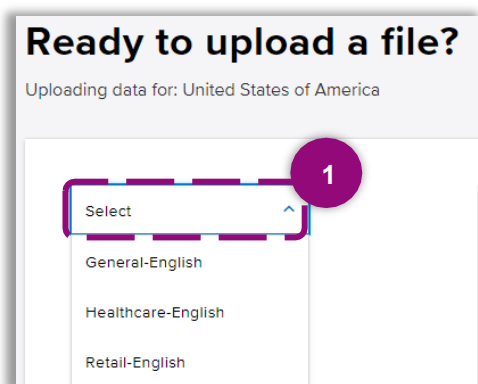
Under all your assigned tasks you have an option to 'Download Blank Submission Template'. Or you can download prefilled template if you have submitted the data last year – 'Download Last Year's Data' link.



If the link turns grey, there are no data to prefill from last year:

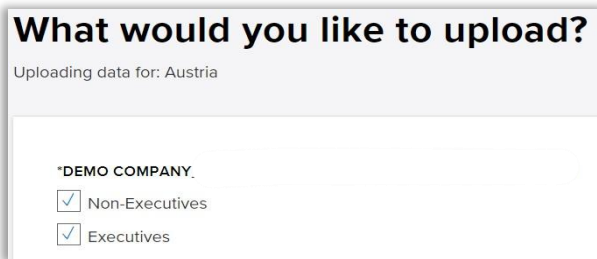


Another option is to proceed with the blue 'Get started' button next to the task you want to begin with, click 'Continue' on the next page and then select the data submission template in the next step. Display the full drop-down menu and select the correct sector and language based on the data being submitted. Once selected, hit download to download the template.



Uploading a Template

Once all the required fields have been completed within the template, you can click on the blue 'Get Started' button next to the required task on the leaderboard. Before uploading, choose the data type that you are uploading – Non-Executives, Executives or both and then click 'Continue':



What would you like to upload?

Uploading data for: Austria

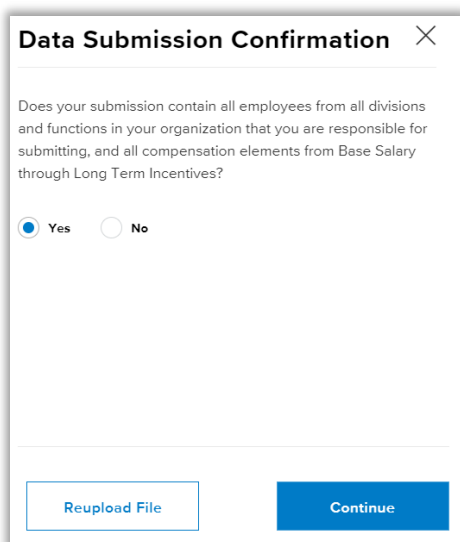
*DEMO COMPANY.

Non-Executives

Executives

'Select Sector for Upload' on the next page. Then click to browse for the file or drag the file to upload to our tool. Follow this same process if you are using your own template but ensure password protections have been removed before uploading.

After uploading your file, a green message will appear indicating the file is ready to be processed. Hit continue to proceed. You will then be prompted to confirm that your data excludes any temporary changes and that all required data was submitted. If you are not able to answer yes, use the 'Reupload File' button to upload a corrected file. If you answered yes, select and hit continue.



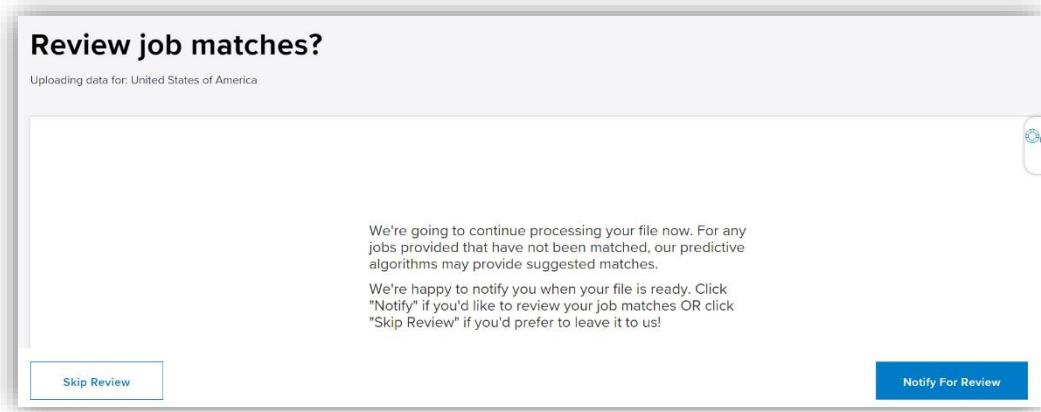
Data Submission Confirmation ✕

Does your submission contain all employees from all divisions and functions in your organization that you are responsible for submitting, and all compensation elements from Base Salary through Long Term Incentives?

Yes No

[Reupload File](#) [Continue](#)

From here, you'll be asked if you would like to be notified when your jobs are ready to be reviewed or you do have the option to skip the job review process. It is strongly recommended that you review the job matches made by the AI.



After clicking 'Notify for Review', the Leaderboard will show the updated status of the data submission tasks. When available, the 'Review Available' button will appear. Select it to continue to the next step.



Step 1: Mapping Data Fields and Business Unit

The mapping data fields portion is necessary especially if you are using your own template to ensure all column fields are mapped to Korn Ferry's fields. For any fields that do not match with Korn Ferry's, select 'Cannot Map' from the drop-down list. For all others, match accordingly. An asterisk will mark fields that are mandatory. If this data is missing from your template, select the 'Reupload File' button.

Lets map your columns.

Uploading data for: United States of America



All fields have been mapped.

NAME	LOCATION	MAP TO	* Required
Employee First Name	Column O	Cannot Map	▼
Employee Surname	Column P	Cannot Map	▼
Number of Employees (Incumbents)	Column R	No. Of Incumbents	▼

Reupload File

Continue

Hit continue once completed to return to the Leaderboard. Here you will find that the status for data submission task now reads, 'Validating'. Refreshing the page after some time will update the status to 'Review Available'.

The next step is to map your data to the correct business unit(s) if the information filled in 'Legal entity / Business Unit' field in the data submission template doesn't match the company mapping in the Onboarding. Match your data to the correct company name in our database from the drop-down menu:

File Mapping

Uploading data for: Germany

FILE VALUES	FIELD TYPE	MAPPING	MAP TO
ABC	Organization Name		Select Organization ▼

Step 2: Reviewing Data Errors and Warnings

'Review Data Warnings' button will appear when the first step is finished:

Executives / Non-Executives

Completed Step 1 of 6

Assigned to:

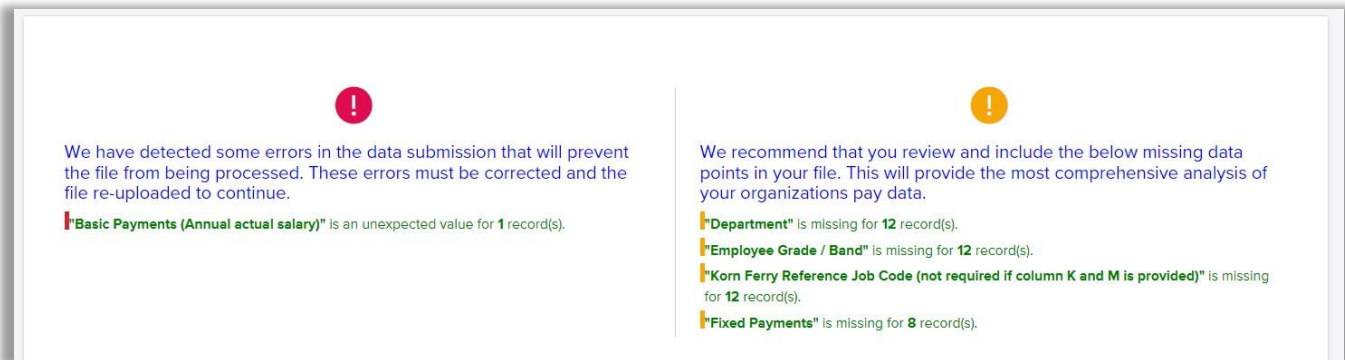
Review Data Warnings

Review any data warnings or exclusions and correct before continuing to the next step in the data submission process.

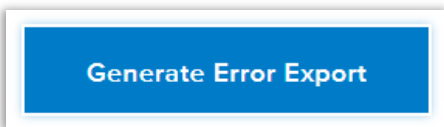
Due: Jul 19, 2024

Click 'Review Data Warnings' button and you will be prompted to review any data inconsistencies found within your file. The left-hand side shows the **errors/missing data that**

must be corrected as they do not meet the minimum requirements. The right-hand side shows warnings/missing data that is needed in order to provide a comprehensive analysis of the pay data but is not required to proceed with the submission.



An option to download an error file report is available at this point as well which will show the cells where the errors were found and error type:



The error export contains two sheets:

- Summary – overview of columns containing errors and warnings including number of records.

	A	B	C	D	E
1	Type	Error Message			
2	Error	"Basic Payments (Annual actual salary)" is an unexpected value for 1 record(s).			
3	Warning	"Department" is missing for 12 record(s).			
4	Warning	"Employee Grade / Band" is missing for 12 record(s).			
5	Warning	"Korn Ferry Reference Job Code (not required if column K and M is provided)" is missing for 12 record(s).			
6	Warning	"Fixed Payments" is missing for 8 record(s).			
7					

- Detail – the column and row address for all errors and warnings.

	A	B	C	D
1	Type	Field Name	Column	Row
2	Error	Basic Payments (Annual full-time equi S		11
3	Error	Basic Payments (Annual full-time equi S		12
4	Warning	Department	F	11
5	Warning	Department	F	12
6	Warning	Department	F	13

Please note that all errors have to be corrected before the data submission file can be accepted by the submission tool.

The 'Fix file and upload again' button will return you to file submission page after your file is corrected.

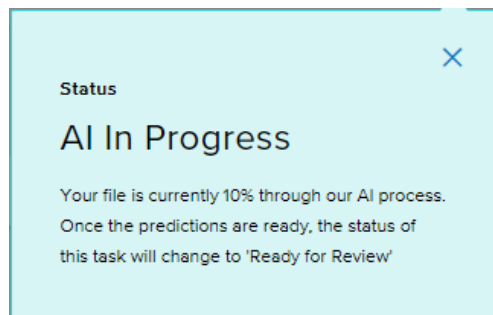
If no required updates are needed, then hit continue.

Step 3: AI Processing



AI begins to match your jobs to Korn Ferry’s Job Architecture. This is partly to correctly code the roles for Korn Ferry’s database but also to allow you to benchmark your data against the market at a job level.

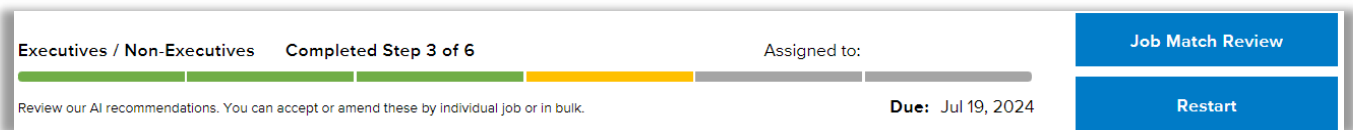
You will see the actual percentage of AI process completed by clicking on the ‘AI In Progress’ status button:



Once the predictions are done status will change to ‘AI completed’. Refresh the page to review the job matches.

*Please note that any correct Korn Ferry job matches made on the template itself will not be overwritten by the AI when uploading to the DCT. Mismatch in job matches will be corrected by the AI.

Step 4: Job Matches Review



An email will be sent to you when the jobs are ready for your review. A ‘Job Match Review’ button will appear with the option to ‘Restart’ the file upload, if needed. Click ‘Job Match Review’ button to continue to the AI Job Matching Tool.

Job Matching Tool

This tool allows you to see all the jobs submitted within your file and review the Korn Ferry matches performed by the AI as well as the original Korn Ferry matches submitted by template. The page can be filtered by Client Family, Korn Ferry Family, a job title search, or by reviewed versus not reviewed. If no matches need to be adjusted, select 'Mark as Complete - Run Final Data Check'. Proceed to next step if adjustments are needed.

Layout of the Job Matching Tool

Organization Job: Data is rolled up by your Internal Job Title. If you have 20 incumbents with the Job Title of Supervisor III, all 20 incumbents are rolled into this line for review.

Korn Ferry Job: This is the Korn Ferry Job that your incumbents are matched to. This match was either provided by you or recommended by the Artificial Intelligence (AI).

Confidence: The confidence value is calculated by the AI Job Coding algorithm and represents the likelihood that the coding suggested by machine learning aligns with the coding that would have been applied through manual processes.

Reviewed By: This will show you who on your internal team has reviewed the job match. If it has not been reviewed, it will state 'Not Reviewed'.

Matched By: If the AI suggested the match, it would say 'Korn Ferry Suggested'. If you submitted the match, or changed the match that the AI suggested, it will say 'Client Matched'.

Bulk Actions: Let you mark jobs as Reviewed, Not Reviewed or Match Jobs in bulk.

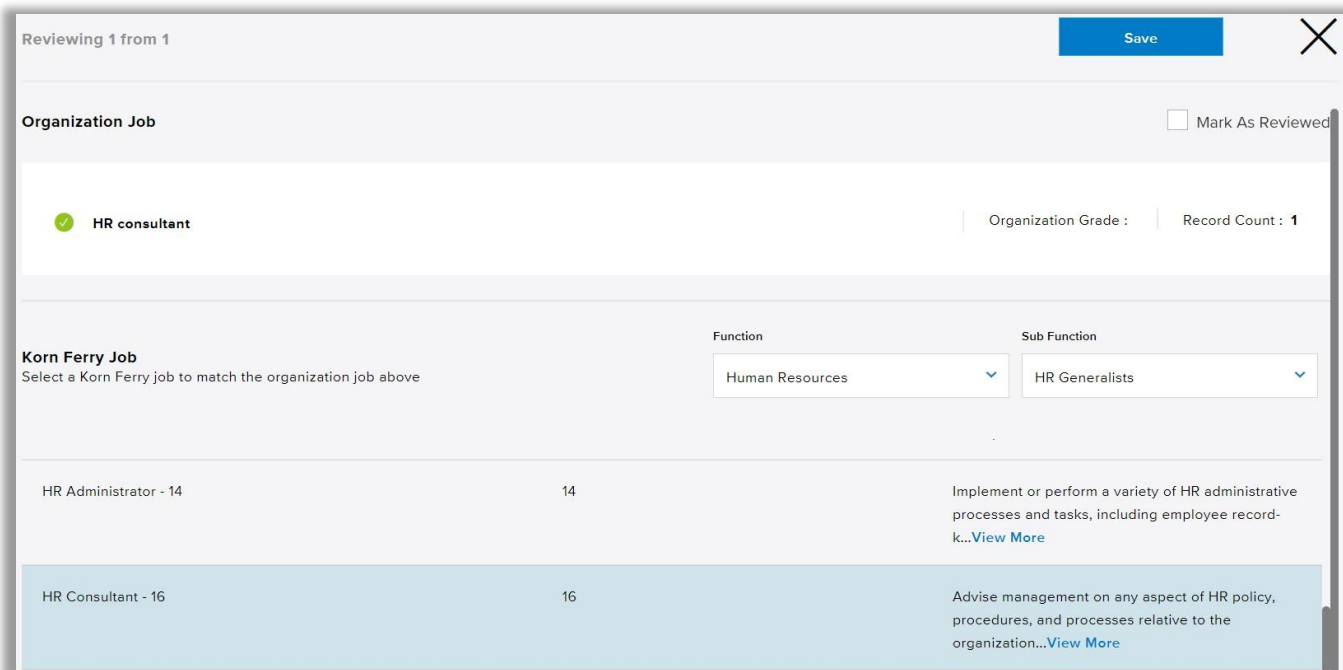
Adjusting Job Matches – Online

To view how the AI arrived at a prediction, select the drop-down menu next to 'View More Suggestions'. This will illustrate the confidence intervals as the AI moves from Korn Ferry functions to functions and sub functions then grade level. If there's enough confidence, the AI will match to a specific job within Korn Ferry's job architecture but if not, it will remain with a function, sub function, and grade level. In addition, by selecting 'Details' you will be able to see your organization's grade level, number of employees with this job title, and the country. Jobs matches will also state if they have been reviewed or not and if the match was provided by your organization with the initial upload or if it is an AI suggestion (Korn Ferry Suggested).

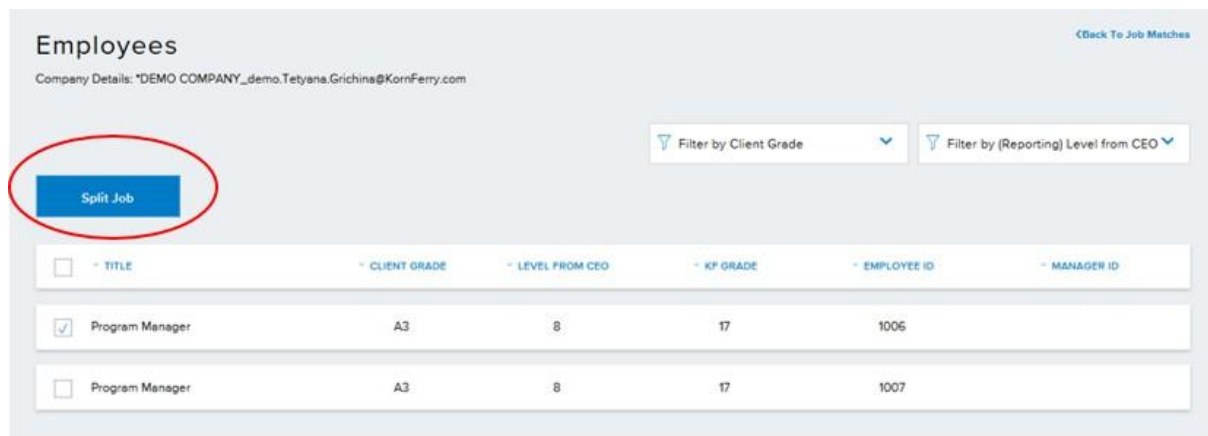
ORGANIZATION JOB	KORN FERRY JOB	CONFIDENCE	REVIEWED BY	MATCHED BY	
<input type="checkbox"/> Process Administrator	Clinical Research and Development Administration Process View More Suggestions ^	76%	Not Reviewed	Korn Ferry Partial Suggested *	View <small>DETAILS v</small>
	Clinical Research and Development Administration Process - 12	76%			SELECT THIS MATCH
	Administration/Support/Service Clerical Services - 12	70%			SELECT THIS MATCH
	Clinical Research and Development Administration Process - 12	76%			SELECT THIS MATCH
	Administration/Support/Service Clerical Services - 12	70%			SELECT THIS MATCH
	Clinical Research and Development - 12	76%			SELECT THIS MATCH

If you are not satisfied with the final match but would like to select a previous prediction, click 'Select this Match' next to the chosen match. If you would like to select something completely outside of what the AI is suggesting, click on 'View'.

Here you will be able to navigate through all the Functions and Sub Functions within Korn Ferry's Job Architecture, review job descriptions, and find the best match for the individual job. Once the function and sub function have been located, select the correct grade level next to the specific job or if a direct job match cannot be made, place the grade level next the sub function or just the function. Check off the 'Mark as Reviewed' box if satisfied with your selection and hit 'Save' to save this match. If you would like to review job matches at a later point in time, you can save your progress by selecting 'Save and Exit' at the main Job Matching Tool page.



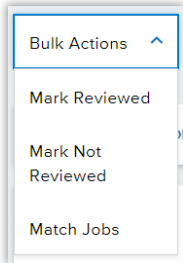
If you need to change the job match of one employee in a group of employees with the same job title, you can do so by clicking on the Job Title. This shows you each employee separately and you'll have the option to then split out an employee if you think they should be matched differently.



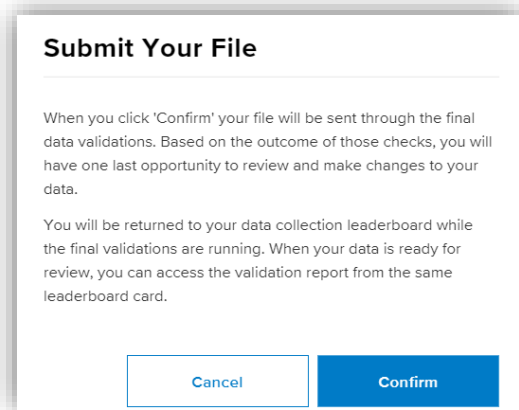
Select "Split Job"; the remaining employees will still appear on the screen. Select 'Back to Job Matches' to see the job split out. At this point you can now confirm the assigned job matches for each employee.

If you would like to review job matches at a later point in time, you can save your progress by selecting 'Save and Exit' at the main Job Matching Tool page.

On the Job Matching Tool page, you can use the checkbox next to the 'Organization Job' field to select all jobs and click the 'Bulk Actions' drop-down menu to select and mark multiple jobs as reviewed.

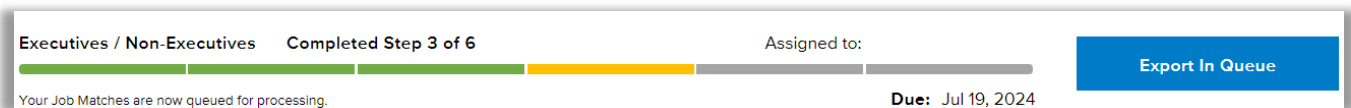


Once all matches have been reviewed, select 'Mark as Complete – Run Final Data Check' button at the top of the page.



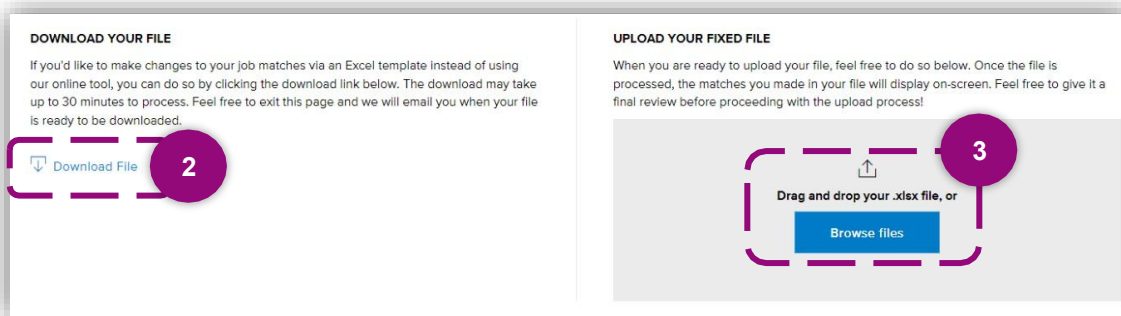
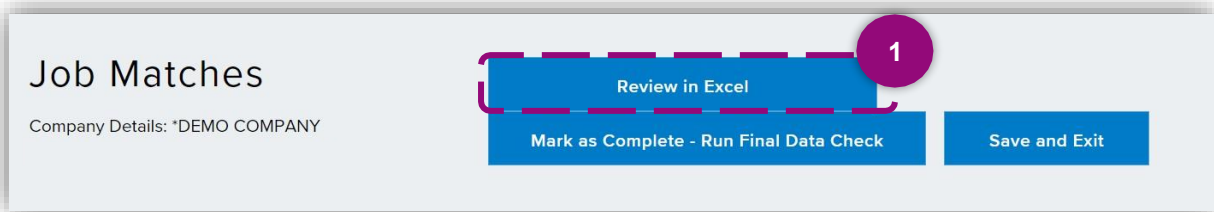
You will be asked to confirm that your file is ready for final data validations. Hit continue to proceed or cancel to return to reviewing the job matches.

Once confirmed, you will be once again taken back to the Leaderboard where you will find the status for the data submission tasks are listed as 'Export in Queue'.

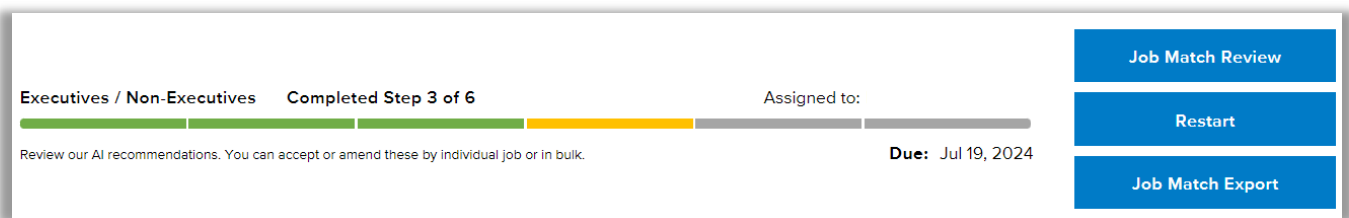


Adjusting Job Matches – Offline

You can also choose to review the AI job matches offline. To do so, click the ‘Review in Excel’ button on the main page of Job Matching Tool. On the next page you can download the file, review, make changes, and upload it back to the tool.



Once you click on ‘Download File’, you will be directed back to the Leaderboard. After the file is ready to be downloaded, click the button ‘Job Match Export’.



When you open the file, you will see that the first six columns include your organizational information (organization name, your job title, employee job family, your internal job code, your internal grade, employee ID). Final job matches chosen by the AI are reported in the following columns grouped as Final Coding (you can find the name of the job code selected in the column ‘KF job match’). Other columns are grouped together as Prediction 1, Prediction 2, etc. and those indicate all job matches that were considered by the AI before it chose the final codes.

If you review Final Coding and want to change any of the codes, you can mark them with 'X' in the column 'Change Flag' and then adjust the rest of the light green columns (KF Job Code, KF Family + Subfamily, KF Reference Level).

Make any changes in these columns only. Mark any changes with an 'X' in the 'Change Flag' column.

KF Ref ID	Organization Name	Your Job Title	Employee Job Family	Your Internal Job Code	Your Internal Grade	Employee ID	FINAL CODING				PREDICTION 1				PREDICTION 2			
							KF Job Match	Change Flag	KF Job Code	KF Family + Subfamily	KF Reference Level	Source (select provided)	KF Job Match	KF Job Code	KF Family + Subfamily	KF Reference Level	Confidence	KF Job Match
26 MA	Accountant	FA	17 F	'017	'007	FAA	'54	KOFRN_FERRY_SL_Accountant-14	'007	FAA	'54	0.395945663	Accountant-15	'005	FAA	'55	0.3333	
27 MA	Accountant	FA	18 F	'018	'007	FAA	'54	KOFRN_FERRY_SL_Accountant-14	'007	FAA	'54	0.395945663	Accountant-15	'005	FAA	'55	0.3333	
28 MA	Accountant	FA	19 F	'019	'007	FAA	'54	KOFRN_FERRY_SL_Accountant-14	'007	FAA	'54	0.395945663	Accountant-15	'005	FAA	'55	0.3333	
29 MA	Accountant	FA	20 F	'020	'007	FAA	'54	KOFRN_FERRY_SL_Accountant-14	'007	FAA	'54	0.395945663	Accountant-15	'005	FAA	'55	0.3333	
30 MA	Accountant	FA	21 F	'021	'007	FAA	'54	KOFRN_FERRY_SL_Accountant-14	'007	FAA	'54	0.395945663	Accountant-15	'005	FAA	'55	0.3333	
31 MA	Accountant	FA	22 F	'022	'007	FAA	'54	KOFRN_FERRY_SL_Accountant-14	'007	FAA	'54	0.395945663	Accountant-15	'005	FAA	'55	0.3333	
32 MA	Accountant	FA	23 F	'023	'007	FAA	'54	KOFRN_FERRY_SL_Accountant-14	'007	FAA	'54	0.395945663	Accountant-15	'005	FAA	'55	0.3333	
33 MA	Accountant	FA	24 F	'024	'007	FAA	'54	KOFRN_FERRY_SL_Accountant-14	'007	FAA	'54	0.395945663	Accountant-15	'005	FAA	'55	0.3333	
34 MA	Accountant	FA	25 F	'025	'007	FAA	'54	KOFRN_FERRY_SL_Accountant-14	'007	FAA	'54	0.395945663	Accountant-15	'005	FAA	'55	0.3333	
35 MA	Manager Tax	FA	21 H	'027	'017	FAC	'53	KOFRN_FERRY_SL_Tax Manager-13	'017	FAC	'53	0.797205312	Taxation				0.704	
36 MA	HR Business Ptnr	HR	32 G	'032	'870	HBA	'58	KOFRN_FERRY_SL_HR Business Partn-'870	HBA	'58	0.544323708	HR Generalists	HBA	'58			0.587	
37 MA	HR Business Ptnr	HR	33 G	'033	'870	HBA	'58	KOFRN_FERRY_SL_HR Business Partn-'870	HBA	'58	0.544323708	HR Generalists	HBA	'58			0.587	
38 MA	HR Business Ptnr	HR	34 G	'034	'870	HBA	'58	KOFRN_FERRY_SL_HR Business Partn-'870	HBA	'58	0.544323708	HR Generalists	HBA	'58			0.587	
39 MA	HR Consultant	HR	35 F	'035	'565	HBA	'53	KOFRN_FERRY_SL_HR Consultant-13	'565	HBA	'53	0.347019427	HR Generalists	HBA	'53		0.686	
40 MA	HR Consultant	HR	36 F	'036	'565	HBA	'53	KOFRN_FERRY_SL_HR Consultant-13	'565	HBA	'53	0.347019427	HR Generalists	HBA	'53		0.686	
41 MA	HR Consultant	HR	37 F	'037	'565	HBA	'53	KOFRN_FERRY_SL_HR Consultant-13	'565	HBA	'53	0.347019427	HR Generalists	HBA	'53		0.686	
42 MA	HR Consultant	HR	38 F	'038	'565	HBA	'53	KOFRN_FERRY_SL_HR Consultant-13	'565	HBA	'53	0.347019427	HR Generalists	HBA	'53		0.686	
43 MA	Training Manager	HR	39 H	'039	'067	HRB	'53	KOFRN_FERRY_SL_Learning and Deve-'067	HRB	'53	0.643637235	Learning and Development	HRB	'53			0.602	
44 MA	Learning Specialist	HR	40 H	'040	'067	HRB	'53	KOFRN_FERRY_SL_Learning and Deve-'067	HRB	'53	0.643637235	Learning and Development	HRB	'53			0.602	

After you finish reviewing your file, click on 'Job Match Review' button on the Leaderboard and then 'Review in Excel' to reach the previously viewed upload section. Then drag and drop your file or click 'Browse files' to upload your changes.

Click 'Review in Progress' to go to the final job matches. When you are finished with this exercise, then click 'Mark as Complete – Run Final Data Check' on the top of the page. The system will ask you to confirm your file before the final data validations.

Step 5: Final Data Validation

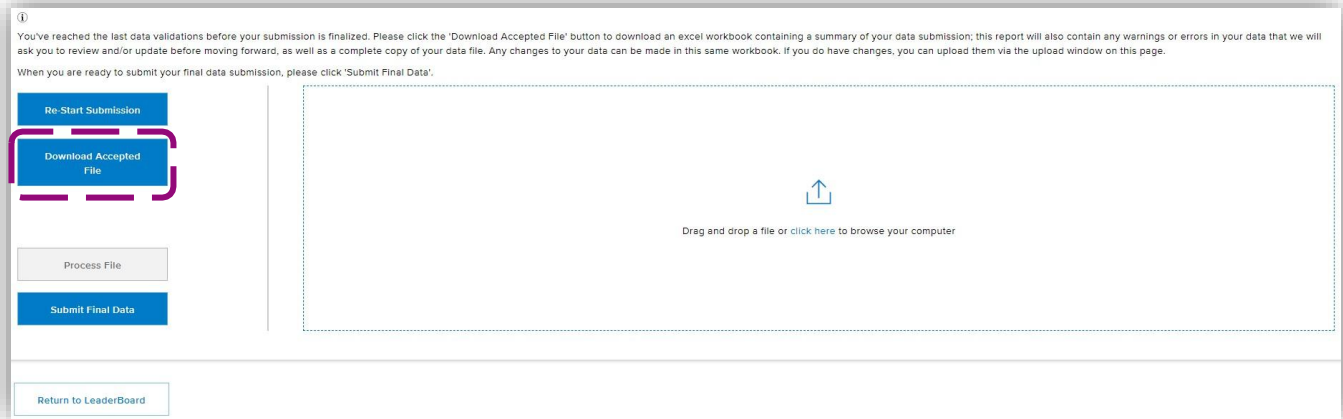
Once step 4 is complete, the submission will be ready for its final review.

Executives / Non-Executives Completed Step 4 of 6 Assigned to: Final Data Review

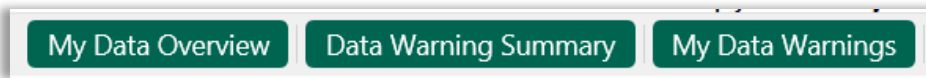
This is the last opportunity to check your data and job matches. Use this stage to make last minute changes, or confirm correct any last data changes required. **Due:** Jul 19, 2024

Select 'Final Data Review' to download the accepted file for further review or re-start submission from scratch.

It is strongly recommended that you select 'Download Accepted File' to download a workbook containing a summary of your data submission highlighting any warnings within your data. If any updates are needed, you can restart the full process of data upload by clicking 'Re-Start Submission' or you can do the adjustments in the Accepted file. If your original file does not need any changes, hit 'Submit Final Data'.



When you open downloaded workbook, you will see additional worksheets apart from the original sheets.



My Data Overview tab shows you differences between your current submission and submission from previous year. Examples of the differences are:

- Number of employees
- Number of employees with reference level higher than 20
- Minimum/ maximum salary
- Minimum/ maximum reference level
- STI/ LTI/ car eligibility.

Data Warning Summary points out any information submitted by you that requires additional attention. Summary of warnings shows all the warnings for this submission, where the issues lie on your original sheet, and how many employees the warning applies to.

Data Warnings Summary		
<p>You are not required to fix warnings prior to completing your submission; however, the quality of your data submission will be better if you do. Please correct the following warnings before submitting. More detailed information about the below warnings can be found on the following tab. You may make updates directly to your data in this workbook, on the same tab you used for your uploaded submission.</p> <p>If you plan to submit additional incumbents based on the warnings displayed in this worksheet, please re-start the data submission process to ensure you are taking advantage of our recommended AI job matches.</p>		
Summary of warnings	Column	Number of Warnings
Incorrect information has been entered in column Regional Code. Unless it is corrected it will be removed from your data submission.	Regional Code	3
If applicable, please complete missing information in column Short Term Variable Payments. This information is used in your KF Pay Reporting, without it there will be some elements of the reports which will not be available.	Short Term Variable Payments	3

Here are some examples of the warnings (please take into account that warnings might differ from one country to another):

- The information in column Monthly Basic Salary looks like it could be incorrect. It is not within the range typical of the market.
- If applicable, please complete missing information in column Short Term Variable Payments. This information is used in your KF Pay Reporting, without it there will be some elements of the reports which will not be available.
- Incorrect information has been entered in column Regional Code. Unless it is corrected it will be removed from your data submission.

The tab **My Data Warnings** shows you which employee IDs you should focus on in your review and why, as well as the column name and row number.

Data Warnings				
You are not required to fix warnings prior to completing your submission; however, the quality of your data submission will be better if you do. Please correct the following warnings before submitting. You may make updates directly to your data in this workbook, on the same tab you used for your uploaded submission.				
If you plan to submit additional incumbents based on the warnings displayed in this worksheet, please re-start the data submission process to ensure you are taking advantage of our recommended AI job matches.				
COMPANYORGCODE	EMPLOYEEID	MESSAGE	COLUMN	ROW
Demo company	125	Incorrect information has been entered in column Regional Code. Unless it is corrected it will be removed from your data submission.	Regional Code	2
Demo company	135	Incorrect information has been entered in column Regional Code. Unless it is corrected it will be removed from your data submission.	Regional Code	6
Demo company	160	Incorrect information has been entered in column Regional Code. Unless it is corrected it will be removed from your data submission.	Regional Code	10
Demo company	220	If applicable, please complete missing information in column Short Term Variable Payments. This information is used in your KF Pay Reporting, without it there will be some elements of the reports which will not be available.	Short Term Variable Payments	20
Demo company	350	If applicable, please complete missing information in column Short Term Variable Payments. This information is used in your KF Pay Reporting, without it there will be some elements of the reports which will not be available.	Short Term Variable Payments	35
Demo company	670	If applicable, please complete missing information in column Short Term Variable Payments. This information is used in your KF Pay Reporting, without it there will be some elements of the reports which will not be available.	Short Term Variable Payments	42

All changes need to be made in your original sheet. All warnings are highlighted in orange which enables you to filter. You can find some sample warnings below:

Current job start date
2017
2020
2020
2014

**Incorrect format*

Regional code
1
London
1 - London
1
1

** Incorrect format*

Bonus eligibility	Short term variable payments
Y	50000
Y	0
Y	
Y	
Y	

**Eligible for bonus but no values provided*

You can either change the data or you can confirm the original information was correct.

Please be informed that all approved data will be loaded into your KF Pay reporting,

therefore, it is suggested that you thoroughly review all warnings, otherwise you might miss this data in KF Pay (e.g. unrecognized Region/Location for your regional benchmark).

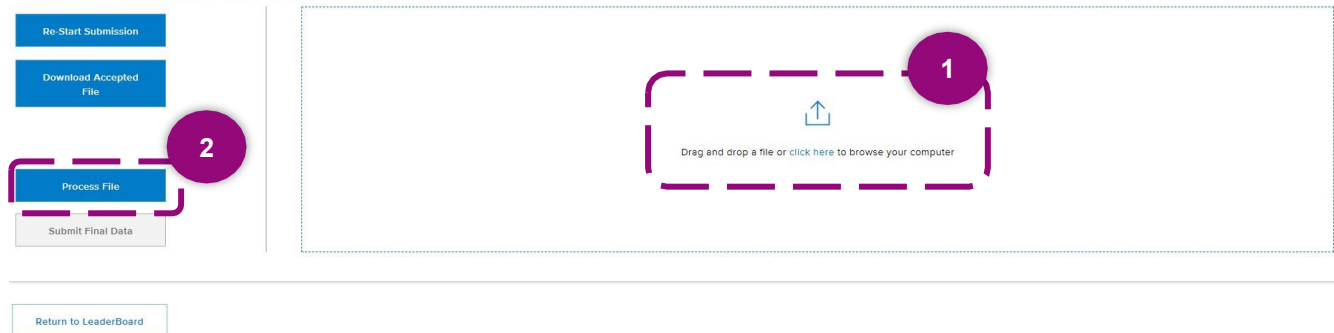
If you have completed your final data checks, upload your file by dragging and dropping or pressing 'click here' in the middle of the screen.

Once the file has been successfully uploaded, you will see a message saying your file is ready to be processed. You can now select 'Process File'.

Your file ORGDC_DE_General_en.xlsx is ready to be processed

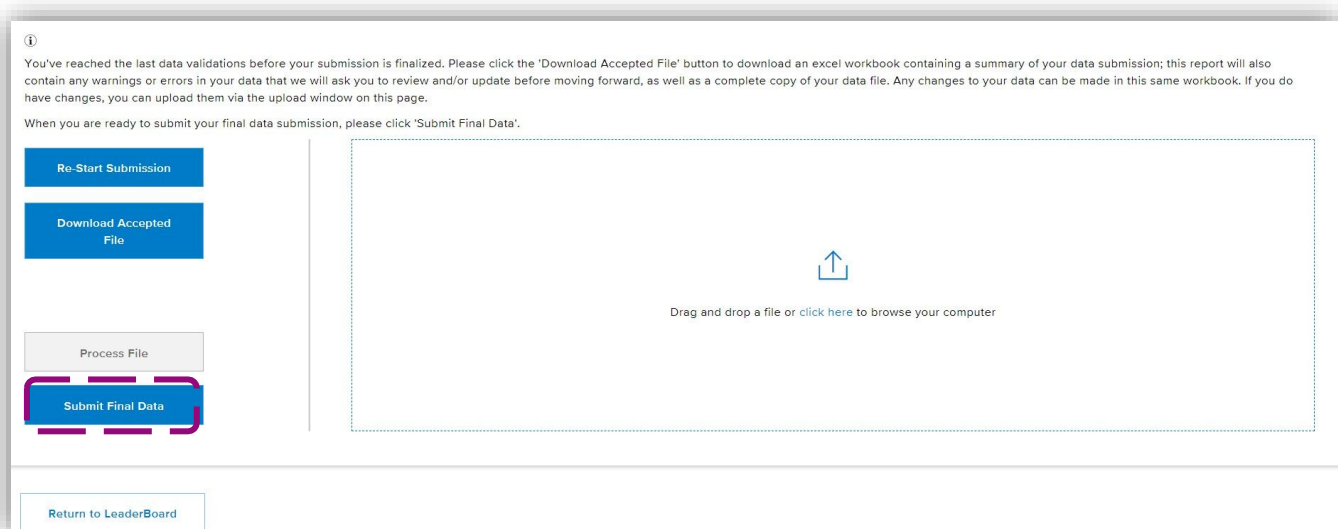
You've reached the last data validations before your submission is finalized. Please click the 'Download Accepted File' button to download an excel workbook containing a summary of your data submission; this report will also contain any warnings or errors in your data that we will ask you to review and/or update before moving forward, as well as a complete copy of your data file. Any changes to your data can be made in this same workbook. If you do have changes, you can upload them via the upload window on this page.

When you are ready to submit your final data submission, please click 'Submit Final Data'.



This will bring you back to the Leaderboard where you can click 'Final Data Review' and go through the final data validations once again.

When you are sure your data is finally correct and does not need any other adjustments, click 'Submit Final Data'.



Step 6: Uploading Data to the Database

Now the only thing left is to upload the data into the database:




Executives / Non-Executives Completed Step 5 of 6 Assigned to: Import In Progress

Preparing your data for upload into our database processing queue. Once loaded it will be available for reporting. Due: Jul 19, 2024

The progress bar shows 5 out of 6 steps completed in green, with the final step highlighted in yellow. A grey button labeled 'Import In Progress' is on the right.

Once the last step is complete, the reporting will be available including your latest data the next day.



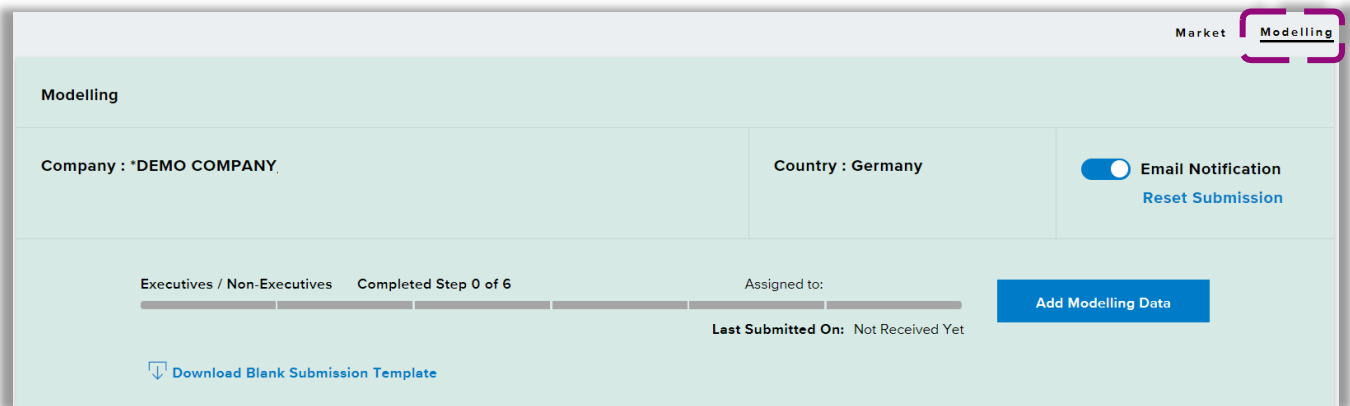
Executives / Non-Executives Completed Step 6 of 6 Assigned to: Submission Complete

Submitted On: Jun 1, 2024

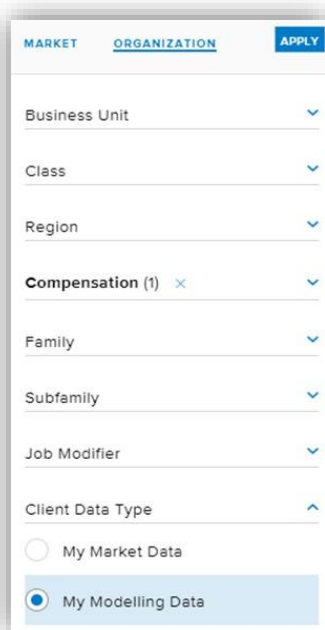
The progress bar shows all 6 steps completed in green. A blue button labeled 'Submission Complete' is on the right.

My Modelling

After submitting your data, you will notice we differentiate your data submission between 'Market' and 'Modelling'. Market refers to your initial data submission while Modelling can be selected to re-upload your data as many times as you would like. Clicking 'Add Modelling Data' takes you through the same steps that were done for the initial market data upload.

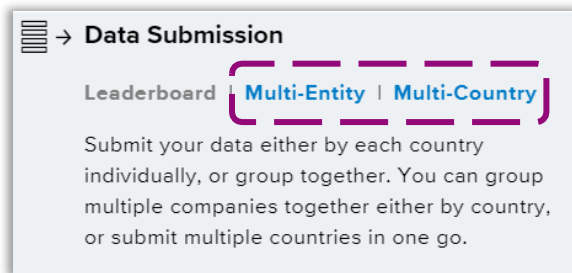


New data will then be loaded into your KF Pay reporting as 'My Modelling'. Within Reward Benchmarking, My Modelling Data can be found by selecting the 'Organization' tab and expanding the menu under 'Client Data Type'.

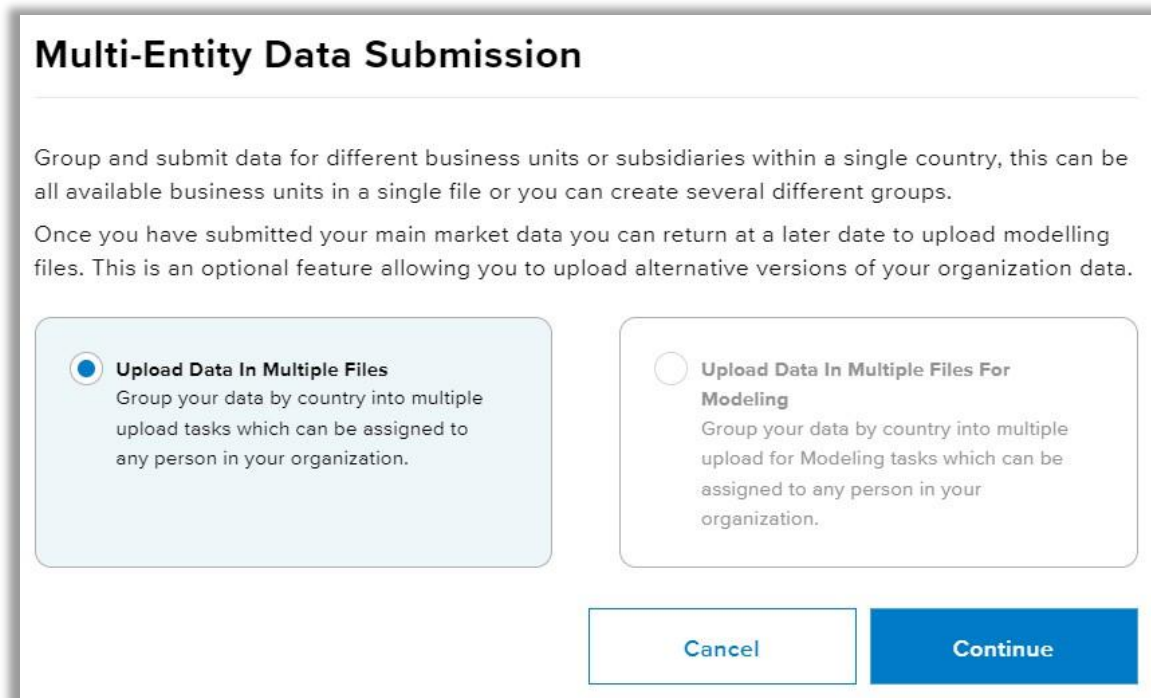


Multi-Entity / Multi-Country Submission

You can group multiple companies together either by country or submit multiple countries in one go. You will find both these options under 'Data Submission' in the upper menu:



A screenshot of a software menu. At the top, there is a hamburger menu icon followed by the text "Data Submission". Below this, the word "Leaderboard" is visible. A dashed purple box highlights two items: "Multi-Entity" and "Multi-Country". Below the highlighted items, there is a paragraph of text: "Submit your data either by each country individually, or group together. You can group multiple companies together either by country, or submit multiple countries in one go."



A screenshot of a dialog box titled "Multi-Entity Data Submission". The dialog contains two paragraphs of text. The first paragraph says: "Group and submit data for different business units or subsidiaries within a single country, this can be all available business units in a single file or you can create several different groups." The second paragraph says: "Once you have submitted your main market data you can return at a later date to upload modelling files. This is an optional feature allowing you to upload alternative versions of your organization data." Below the text are two radio button options. The first option is selected and is titled "Upload Data In Multiple Files" with the description: "Group your data by country into multiple upload tasks which can be assigned to any person in your organization." The second option is unselected and is titled "Upload Data In Multiple Files For Modeling" with the description: "Group your data by country into multiple upload for Modeling tasks which can be assigned to any person in your organization." At the bottom of the dialog are two buttons: "Cancel" and "Continue".

Multi-Country Data Submission

Group and submit data for different countries, this can be all available countries in a single file or you can create several different groups of countries.

Once you have submitted your main market data you can return at a later date to upload modelling files. This is an optional feature allowing you to upload alternative versions of your organization data.



Upload Data In Multiple Files

Group your data by country and subsidiary into multiple upload tasks which can be assigned to any person in your organization.



Upload Data In Multiple Files For Modeling

Group your data by country and subsidiary into multiple upload for Modeling tasks which can be assigned to any person in your organization.

Cancel

Continue

To upload more entities or countries at once select 'Upload Data in Multiple Files' under appropriate button. The options to upload data for modelling will be available once the market data are submitted.

Now you can create your own groups of countries / subsidiaries in the 'Group my tasks' step and then submit the data accordingly. Created groups will be present as multiple upload tasks which can be assigned to any person within your organization.

Select 'Create a Group' and assign a group name. Then select the countries and subsidiaries that you would like to include within one group. Once satisfied with your selection, hit 'Add selection to group' and select 'Save Group'. Then choose 'Save and Return to Leaderboard' where you'll be able to assign individual upload tasks for each group that you have created.

You won't be able to select subsidiary which has been already assigned to another group.

Group My Tasks

You can create your upload tasks below and group them by any combination of countries and subsidiaries. Any subsidiaries that are not added to a task grouping will remain as single upload tasks on your leaderboard.

Parent Organization: *DEMO COMPANY_ Number of Countries: 4 Number of Subsidiaries: 3

Select Countries / Subsidiaries to Group

View By: Country Hide grouped:

3 + Add selection to group

Select All/Deselect All

- Austria 0% **2**
- Belgium 0%
- Germany 100%
- Switzerland 0%

Cancel

My Groups

Groups will appear below as you create them - and can be changed or deleted.

1 + CREATE A GROUP

other countries

Group Name: other countries 0

View By: Country

4 Save Group

5 Save and Return to Leaderboard

DELETE GROUP

Below you can see an example of leaderboard with two groups: one group for the data from three countries and another group for all subsidiaries from Germany:

Data Groups

Group: other countries	Country : Multi-Country Submission(3)	<input checked="" type="checkbox"/> Email Notification
<p>Executives / Non-Executives Completed Step 0 of 6 Assigned to: _____</p> <p style="text-align: right;">Due: Jul 15, 2024</p> <p>Download Blank Submission Template Download Last Year's Data</p> <p style="text-align: right;">Get Started</p>		
Group: německá grupa	Country : Germany (3 Entities)	<input checked="" type="checkbox"/> Email Notification
<p>Executives / Non-Executives Completed Step 0 of 6 Assigned to: _____</p> <p style="text-align: right;">Due: Jul 19, 2024</p> <p>Download Blank Submission Template Download Last Year's Data</p> <p style="text-align: right;">Get Started</p>		

Now you are able to submit data for these groups following the same steps as previously mentioned for single country / single subsidiary data submission.

If the information filled in 'Country' field in the data submission template doesn't match the correct country name, 'Review Available' button will appear and you will be prompted to map the countries from the drop-down menu:

File Mapping

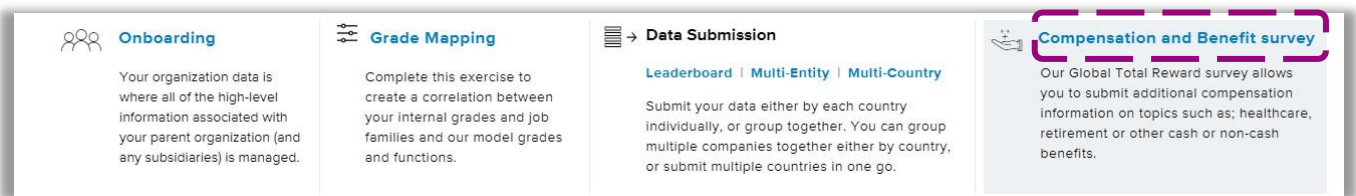
Uploading data for: Austria, Belgium

FILE VALUES	FIELD TYPE	MAPPING	MAP TO
Austri	Country	!	Select Country
Belgi	Country	!	Select Country

Once this is corrected, you can continue with the data submission.

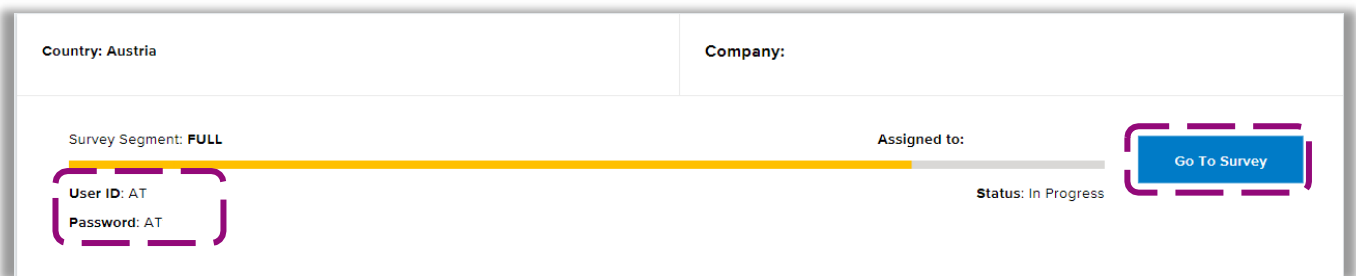
Compensation and Benefit Survey

You can also fill in the Compensation and benefits questionnaire directly from the Data submission page. Click the last menu option as shown at the picture below:



Here you can again assign a task of questionnaire filling to yourself or to another user by clicking the standard 'Assign' button.

You will be able to see the login details for the survey for your assigned tasks and you can go directly to Confirmit page to fill the questionnaire when you click on the 'Go To Survey' button.



Use the login details in Confirmit login page:

Log in here

Please provide your username and password to participate in the survey.

Username

Password

Preferred language ▼
Bevorzugte Sprache

Appendix



Definitions

Industry & Segments

Industry	Segment	Definition
Banks	Central and/or development banks	National banks, international development banks.
	Investment Banks	Banks whose primary purpose is to provide investment banking services and advice
	Retail Banks	Banks whose primary purpose is to offer personal banking services and related products
	Retail/Corporate/Commercial Banks	Banks which provide both personal and corporate banking services
	Universal Banks	Banks providing retail, business, corporate and investment banking services
Chemicals	Basic Chemicals	Producers and distributors of simple chemical products that are primarily used to formulate more complex chemicals or products, including plastics and rubber in their raw form, fiberglass and synthetic fibers, industrial gases.
	Diversified Chemicals	Producers and distributors of basic and specialty chemicals.
	Specialty Chemicals	Producers and distributors of finished chemicals for industries or end users, including dyes, cellular polymers, coatings, special plastics, and other chemicals for specialized applications. Includes makers of colorings, flavors and fragrances, fertilizers, pesticides, chemicals used to make drugs, paint in its pigment form and glass in its unfinished form.

Construction & Materials	Building Materials	Producers of materials used in the construction and refurbishment of buildings and structures, including cement and other aggregates, wooden beams and frames, glass, roofing, and flooring materials other than carpets. Includes producers of bathroom and kitchen fixtures, plumbing supplies and central air-conditioning and heating equipment. Excludes producers of raw lumber, which are classified under Forestry and Paper.
	Construction	Companies engaged in the construction of commercial buildings, infrastructure such as roads and bridges, residential homes, and apartment buildings, including mobile and prefabricated homes intended for use in one place and providers of services to construction companies, such as masons, plumbers, and electrical contractors.
Consumer Durables	Consumer Electronics	Manufacturers and distributors of consumer electronics, such as TVs, VCRs, DVD players, audio equipment, cable boxes, calculators and photographic equipment and supplies and camcorders.
	Durable Household Goods	Manufacturers and distributors of domestic appliances, lighting, hand tools and power tools, hardware, cutlery, tableware, garden equipment, luggage, towels, and linens. Manufacturers and distributors of furniture, including chairs, tables, desks, carpeting, wallpaper, and office furniture.
	Durable Personal Goods	Manufacturers and distributors of all types of clothing, jewelry, watches, or textiles. Includes sportswear, sunglasses, eyeglass frames, leather clothing and goods, and processors of hides and skins. Manufacturers and distributors of shoes, boots, sandals, sneakers, and other types of footwear.

Consumer Durables	Leisure Goods	Manufacturers and distributors of recreational equipment. Includes musical instruments, RVs, ATVs, and marine recreational vehicles such as yachts, dinghies, and speedboats. Manufacturers and distributors of toys and video/computer games, including such toys and games as playing cards, board games, stuffed animals, and dolls.
Education	Continuous education	Includes vocational training, apprenticeships, language schools, e-learning, distance, and open learning. Excludes universities.
	Educational services and support	Includes software and technology, outsourced service providers, professional organizations.
	Elementary and secondary schools	Includes primary and secondary schools, 6th form colleges and academy schools.
	Governing education bodies	Includes government departments, local authorities, district school boards.
	Higher education	Includes colleges, universities, military academies, business schools.
Fast Moving Consumer Goods	Food and Drink	Food producers, including meatpacking, snacks, fruits, vegetables, dairy products, and frozen seafood. Includes producers of pet food and manufacturers of dietary supplements, vitamins, and related items. Manufacturers, bottlers, and distributors of nonalcoholic beverages, such as soda, fruit juices, tea, coffee, and bottled water. Manufacturers and shippers of cider or malt products such as beer, ale, and stout. Producers, distillers, vintners, blenders and shippers of wine and spirits such as whisky, brandy, rum, gin, or liqueurs.

	Household and Personal Care	Producers and distributors of pens, paper goods, batteries, light bulbs, tissues, toilet paper and cleaning products such as detergents and polishes. Makers and distributors of cosmetics, toiletries and personal-care and hygiene products, includes makers of contraceptives other than oral contraceptives, which are classified under Pharmaceuticals.
Fast Moving Consumer Goods	Tobacco	Manufacturers and distributors of cigarettes, cigars, and other tobacco products. Includes tobacco plantations.
Healthcare	Governing health bodies	Includes regional health authorities, district health boards, regulatory bodies, self-governing organizations.
	Health care providers (excluding hospitals)	Private and public owners and operators of health maintenance organization, clinics, dentists, ophthalmologists, nursing homes, rehabilitation, and retirement centers.
	Hospitals and health systems	Includes acute hospitals, mental establishments, paramedics
High Technology	Aerospace and Defense	Manufacturers, assemblers and distributors of aircraft and aircraft parts primarily used in commercial or private air transport. Excludes manufacturers of communications satellites, which are classified under Telecommunications Equipment. Producers of components and equipment for the defense industry, including military aircraft, radar equipment and weapons.

	Electronic and Electrical Equipment	Makers and distributors of electrical parts for finished products, such as printed circuit boards for radios, televisions, and other consumer electronics. Includes makers of cables, wires, ceramics, transistors, electric adapters, fuel cells and security cameras. Producers and distributors of semiconductors and other integrated chips, including other products related to the semiconductor industry, such as semiconductor capital equipment and motherboards. Manufacturers and distributors of electronic products used in different industries. Includes makers of lasers, smart cards, bar scanners, fingerprinting equipment and other electronic factory equipment.
	Software	Publishers and distributors of computer software for home or corporate use. Excludes computer game producers, which are classified under Leisure Goods.
High Technology	Technology, Hardware and Equipment	Manufacturers and distributors of computers, servers, mainframes, workstations and other computer hardware and subsystems, photocopiers, and fax machines. Excludes makers of printed circuit boards and semiconductors, which are classified under Electronic and Electrical Equipment.
	Telecommunications Equipment	Makers and distributors of high-technology communication products, including satellites, mobile telephones, fiber optics, switching devices, local and wide-area networks, teleconferencing equipment, and connectivity devices for computers, including hubs and routers.
Industrial Goods	Automobile Parts	Manufacturers and distributors of new and replacement parts for motorcycles and automobiles, such as engines, carburetors, batteries and vehicle glass and manufacturers, distributors and retreaders of automobile, truck, and motorcycle tires.

	Automobiles	Makers of motorcycles and passenger vehicles, including cars, sport utility vehicles (SUVs) and light trucks. Excludes makers of heavy trucks, which are classified under Commercial Vehicles and Trucks, and makers of recreational vehicles (RVs and ATVs), which are classified under Leisure Goods.
	Commercial Vehicles and Trucks	Manufacturers and distributors of commercial vehicles and heavy agricultural and construction machinery, including rail cars, tractors, bulldozers, buses, and industrial lawn mowers. Includes nonmilitary shipbuilders, such as builders of cruise ships and ferries.
	Containers and Packaging	Makers and distributors of cardboard, bags, boxes, cans, drums, bottles and jars and glass used for packaging.
	Diversified Industrials	Industrial companies engaged in three or more classes of business within the Industrial Goods Industry that differ substantially from each other.
Industrial Goods	Industrial Machinery	Designers, manufacturers, distributors and installers of industrial machinery and factory equipment, such as machine tools, lathes, presses, and assembly line equipment. Includes makers of pollution control equipment, castings, pressings, welded shapes, structural steelwork, compressors, pumps, bearings, elevators, and escalators.
	Primary Food Manufacturers	Manufacturers of unbranded primary food ingredients, which are sold to other companies rather than directly to consumers. Examples could include companies making cooking oil, flour, or sugar.
Insurance	Full Line Insurance	Insurance companies with life, health, property, and casualty and/or reinsurance interests

	General Insurance	Companies engaged principally in accident, fire, automotive, marine, malpractice, and other classes of nonlife insurance.
	Health Insurance - For Profit	Companies engaged principally in health insurance, for profit.
	Health Insurance - Not For Profit	Companies engaged principally in health insurance, for social or non-profit provision.
	Insurance Brokers	Insurance brokers and agencies.
	Life Insurance	Companies engaged principally in life insurance.
	Reinsurance	Companies engaged principally in reinsurance.
Leisure and Hospitality	Hotels, Resorts and Cruise Lines	Operators and managers of hotels, motels, lodges, resorts, spas, cruise lines and campgrounds.
	Leisure Facilities	Providers of leisure facilities and services, including fitness centers, movie theaters and sports teams. Providers of gambling and casino facilities. Includes online casinos and racetracks.
Leisure and Hospitality	Restaurants and Bars	Operators of restaurants, fast-food facilities, coffee shops and bars.
	Travel and Tourism	Providers of travel and tourism related services, including travel agents, online travel reservation services.
Life sciences	Biotechnology	Companies engaged in research into and development of biological substances for the purposes of drug discovery and diagnostic development, and which derive the majority of their revenue from either the sale or licensing of these drugs and diagnostic tools.

	Life science services	Companies enabling the drug discovery, development, and production continuum by providing analytical tools, instruments, consumables and supplies, clinical trial services and contract research services. Includes firms primarily servicing the pharmaceutical and biotechnology industries.
	Medical equipment and supplies	Manufacturers and distributors of medical devices such as MRI scanners, prosthetics, pacemakers, X-ray and manufacturers and distributors of medical supplies used by health care providers and the general public. Includes makers of contact lenses, eyeglass lenses, bandages, and other disposable medical supplies.
	Pharmaceuticals	Manufacturers of prescription or over-the-counter drugs, such as aspirin, cold remedies, and birth control pills. Includes vaccine producers but excludes vitamin producers, which are classified under Food and Drink.
Media	Broadcasting and Entertainment	Creators, aggregators, producers, and/or distributors of radio, television, music, filmed, and internet-based entertainment content. Excludes movie theaters, which are classified under Leisure Facilities.
	Media Agencies	Providers of advertising, public relations, and marketing services. Includes billboard providers and telemarketers.
Media	Publishing	Publishers of information via printed or electronic media.
Natural Resources	Farming and Fishing	Companies that grow crops or raise livestock, operate fisheries, or own nontobacco plantations. Includes manufacturers of livestock feeds and seeds and other agricultural products but excludes manufacturers of fertilizers or pesticides, which are classified under Specialty Chemicals.

	Forestry and Paper	Owners and operators of timber tracts, forest tree nurseries and sawmills. Excludes providers of finished wood products such as wooden beams, which are classified under Building Materials. Producers, converters, merchants, and distributors of all grades of paper. Excludes makers of printed forms, which are classified under Business Services, and manufacturers of paper items such as cups and napkins, which are classified under Household and Personal Care.
	Industrial Metals	Companies that mine or process bauxite or manufacture and distribute aluminum for use by other industries. Producers and traders of metals and primary iron and steel products encompassing all processes from smelting in blast furnaces to rolling mills and foundries. Excludes manufacturers of finished products, which are categorized according to the type of end product.
	Mining	Companies engaged in the exploration for mining of coal. Exploration, extraction or refining of minerals. Exploration for and production of precious metals.
Not-for-Profit	Affordable Housing	Providers of low-cost market and subsidized housing for rental, shared ownership, or outright purchase, including housing associations. Also called, social, public, or subsidized housing.
	Charitable and Religious Organizations and NGO's	Includes charitable organizations, religious organizations, and other non-governmental organizations.
Not-for-Profit	Membership Organizations	Organizations generally looking to provide value-added services to attract and retain their members, includes trade associations, institutions, federations e.g., CIPD, Law Society.
Oil and Gas	Exploration and Production (Upstream)	Companies engaged in exploration for and drilling of oil and gas products.

	Integrated Oil and Gas	Integrated oil and gas companies engaged in exploration for and drilling, production, refining and distribution of oil and gas products.
	Oil Field Services	Suppliers of equipment and services to oil fields and offshore platforms.
	Refining, Marketing and Distribution (Downstream)	Companies engaged in refining, distribution and selling of oil and gas products. Includes operators of pipelines carrying oil, gas, or other forms of fuel. Excludes pipeline operators that derive the majority of their revenues from direct sales to end users, which are classified under Electricity and Gas.
Public Sector	Armed Services	Government establishments primarily engaged in national security and related activities, includes army, navy, and air force.
	Cultural Services	Includes Libraries, Museums and Galleries and Zoological and Botanical Gardens.
	International Affairs	Organizations engaged in diplomacy, international relations and programs relating to other nations. E.g., UN, IMF, embassies
	Justice, Public Order and Safety	Government establishments engaged in the administration of justice, public order, and safety programs, includes Police, Fire, Prison Services and Courts.
	Local/State/Regional Government	Administrative offices that are smaller than a nation, e.g., city, county, parish, township, municipality, borough, board, district, province, state.
Public Sector	Local/State/Regional Government Agencies	Permanent or semi-permanent agencies and bodies that are responsible for the oversight and administration of specific functions at below national level. Although usage differs, government agencies are normally distinct both from a Department or Ministry, and other types of public body established by government
	National Government	Government at the level of the nation.

	National Government Agencies	Permanent or semi-permanent agencies and bodies that are responsible for the oversight and administration of specific functions at National level. Although usage differs, government agencies are normally distinct both from a Department or Ministry, and other types of public body established by government.
Retail	Apparel Retailers	Retailers and wholesalers specializing mainly in clothing, shoes, jewelry, sunglasses, and other accessories, excluding Luxury Goods Retailers which are coded under Luxury Goods Retailers.
	Department Store/Broadline Retailers	Retail outlets and wholesalers offering a wide variety of products including both clothing and other goods.
	Drug Retailers	Operators of pharmacies, including wholesalers and distributors catering to these businesses.
	Food Retailers and Wholesalers	Supermarkets, food-oriented convenience stores and other food retailers and distributors. Includes retailers of dietary supplements and vitamins.
	Home Improvement Retailers	Retailers and wholesalers concentrating on the sale of home improvement products, including garden equipment, carpets, wallpaper, paint, home furniture, blinds, and curtains, and building materials.
Retail	Luxury Goods Retailers	Retail and wholesale specializing in high end products that are driven by designer image and reputation. Products are sold through boutiques and department stores - products include fine jewelry, designer clothing, shoes, handbags, luggage, etc., examples are top designer brands like Gucci, Hermes, Louis Vuitton.
	Specialized Consumer Services	Providers of consumer services such as auction houses, dry cleaners, consumer rental companies, veterinary clinics, hair salons, fitness centers and providers of funeral, lawn-maintenance, consumer-storage, heating and cooling installation and plumbing services.

	Specialty Retailers - Single Category	Retailers and wholesalers concentrating on a single category of products, which is not covered by the other sector codes for drug retailers, food retailers, apparel, luxury goods or home improvement retailers. Examples could include books, electricals, petrol forecourts, or novelty goods.
Services	Accountancy Firms	Providers of accounting and audit services to companies.
	Business Services	Providers of support services, business training and employment agencies, financial administration (i.e., outsourcing the finance function from a company - different to the financial administration covered in segment), industrial suppliers, waste and disposal services and catering services.
	Law Firms	Providers of legal services to companies and individuals.
	Management Consulting Firms	Companies providing management consulting services.
	Other Professional Services	Providers of professional services to a wide range of industrial enterprises and governments incl architectural and engineering services and surveyors and computer services. This excludes accountancy firms, law firms, and management consultants, which are covered separately (Accountancy Firms, Law Firms and Management Consulting Firms respectively).
Telecommunications	Integrated Telecommunications	Providers of fixed line and mobile telecoms services; internet service providers and cable TV services.
Transportation	Airlines	Companies providing primarily passenger air transportation.
	Logistics (including air freight)	Companies providing air freight transportation, courier, and logistics services, including package, mail delivery and post offices and customs agents. Excludes those companies classified under Airlines, Marine or Road and Rail.

	Marine	Companies providing goods or passenger maritime transportation. Excludes cruise-ships classified under Hotels, Resorts and Cruise Lines.
	Road and Rail	Companies providing primarily goods and passenger land transportation. Includes vehicle rental and taxi companies
	Transportation Infrastructure	Operators of airports and companies providing related services. Owners and operators of roads, tunnels, and rail tracks. Owners and operators of marine ports and related services.
Utilities	Electricity and Gas	Companies generating and distributing electricity, including generation using geothermal, nuclear, and solar energy and all alternative power sources. Distributors of gas to end users. Excludes providers of natural gas as a commodity, which are classified under the Oil and Gas.
	Multiutilities	Utility companies with significant presence in more than one utility.
	Water	Providers water to end users, including water and sewage treatment plants.

Ownership Structure

Ownership structure	Definition
Family	Decision-making is significantly influenced by a family or families closely identified with the firm through leadership or ownership.
Government/Public Sector	A part of the state that either deals with the production, delivery, or allocation of goods and services by and for the government, or that establishes and implements policies and regulatory frameworks that govern elements within society or the economy.
Government-Owned Enterprise	An entity created by a government to undertake commercial activities on behalf of the state.
Not-for-Profit	An organization that does <u>not</u> strive to make a profit and does <u>not</u> distribute surplus funds to owners or shareholders, but instead uses them to help pursue its goals.
Private Venture Capital	A company whose ownership is privately held, with one or more venture capital investors supplying significant funding in exchange for appreciable influence or control, often through seats on the Board.
Private Employee/Cooperative	An organization owned by its members; profits are used as agreed by the membership board.
Private Partnership	A business in which two or more people share ownership, contribute to all aspects of the business, and share profits and losses.
Private Joint Venture	A business entity created by two or more parties, characterized by shared ownership, shared returns and risks, and shared governance.
Self-Employed	A firm owned and operated by one individual, perhaps with a few assistants or employees.
Publicly Traded Widely Held Ownership	A company whose ownership is dispersed among the general public in shares of stock freely traded on a stock exchange.
Publicly Traded Concentrated Ownership	A company whose ownership is dispersed to the public in shares of stock traded on an exchange, but whose shares are distributed in a way that gives control of the company to a few individuals or business entities.