

# SPICE

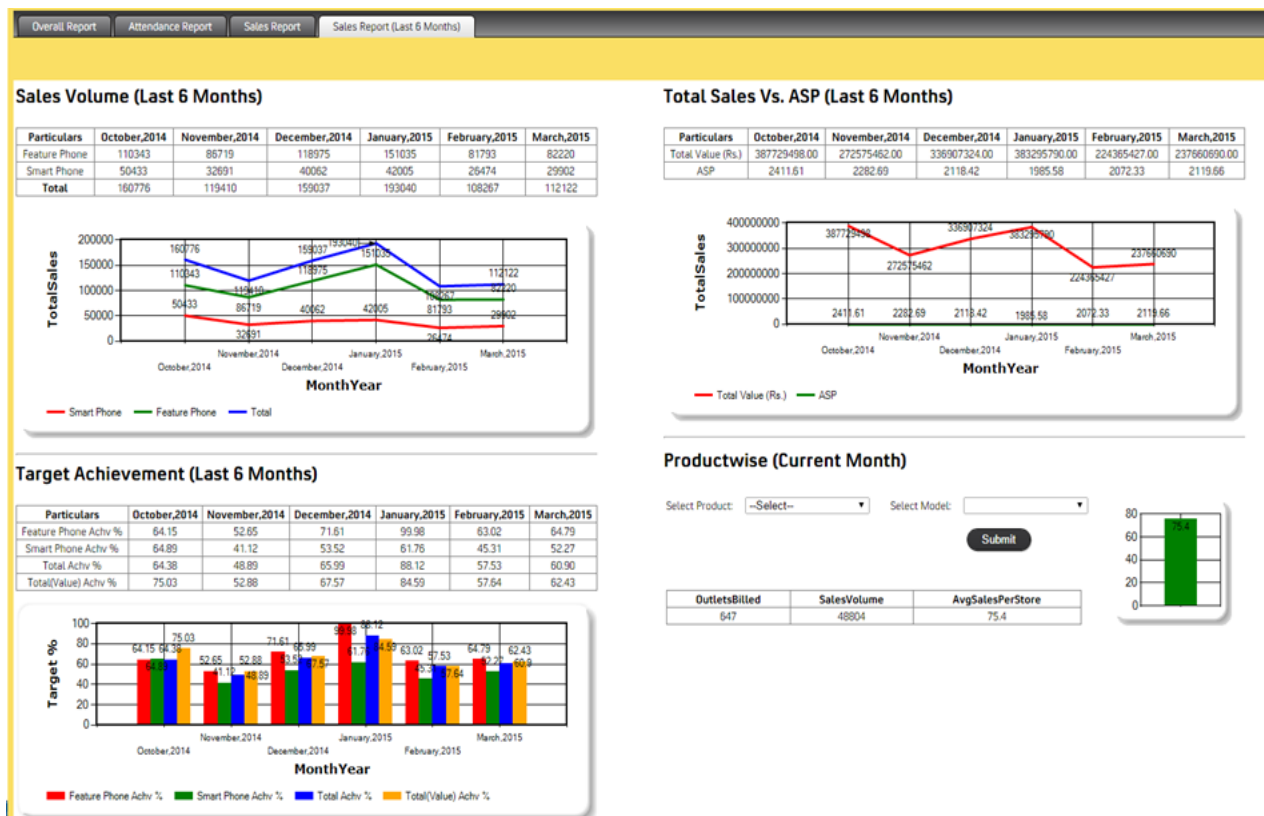
## SALES FORCE AUTOMATION PROJECT

### Abstract

Mobile handset distribution in India is a tough and challenging business. The distribution is characterized by large number of SKUs available in the market, high obsolescence rate of models, high inventory carrying costs, quick response time to cater to market need and highly competitive landscape. In such a scenario, the relevant information available to the management on real-time basis for decision-making becomes critical. However, current practices in company are not in position to deliver the required information in a quick and efficient manner to the management.

The current practices prevalent in the companies are submerged in the following major challenges:

- **Manual or semi-automated processes:** Loss of sales force market time due to paper work, follow-ups & administrative issues
- **Delayed visibility into sales operations:** Inability to use sales data effectively at various touch points, thereby having an impact on business growth
- **Multiple stand-alone systems:** Lack of consolidated information on a timely basis from different touch points resulting in delayed actions
- **Using analytics for decision making:** Inability to identify what actions to take based on which information since large sets of information is available



Sales Workflow Automation project is a full-fledged automation projects linking various sales related activities at all levels of Sales hierarchy to deliver quality insights for quick decision making. The objectives of automation project are to improve quality of information gathered at various customer touch points while applying bespoke tools &

techniques, in order to enhance operational effectiveness of all users involved and to seek superior knowledge & insights for management action.



The workflow automation solution is a mobile based automation tool along with backend platform. The automation solution covers the various stakeholders in the distribution channel – Field Sales Executive, In-Store Demonstrators, Team Leaders, Company Sales Hierarchy & Distributors. The underlying principles followed for successful implementation are it should be beneficial to all the stakeholders involved, easy to use automation tools and should not disturb the current way of working in totality, but still aim for continuous improvement.

The following areas are broadly covered by the automation solution – Last Mile Counter Control, Execution Planner, Sales Order Tool & Distribution Diagnostics

The Last Mile Counter Control involves data collection of outlets on relevant information fields along with GPS coordinates and outlet photo. The data collection happens through a mobile handset pre-loaded with mobile application. The benefits of this activity are as follows:

- Outlet-wise data points are captured by company’s sales team → ensures discipline of the sales team knowing the exact outlets
- Geo-location & Outlet photo are captured → enables unique and easy identification allowing visibility to the company

- Availability of competition products/ brands details at the outlet → helps in aligning execution planner and thereby empowers focused sell-in, resulting in productive calls and reducing costs and risks
- Outlet database (with Geo-location & Outlet photo) becomes company's property. Also, the database is individual agnostic

The output of Last Mile Counter Control is in form of basic dashboards (Outlet database file, Productivity report etc.) as well as map-based reporting. The map-based reporting provides great visual depiction of the outlets covered by the sales team. The visual depiction throws up white spaces in terms of areas not covered, thereby helping in increasing outlet penetration. Also, the counter information can be dynamically managed to locate target outlets and plan routes for the Field Sales Executive to reach the targeted outlets.

The Execution Planner helps in planning of which outlets will have particular SKUs of the company. It also provides support for merchandising planning, OOH Media planning & Distributor Coverage.

The Sales Order Tool is a mobile application pre-loaded on a mobile handset. The tool consists of pre-loaded route plan for the Field Sales Executive to perform their daily sales related tasks. The performance of Field Sales Executive on the ground can be tracked at various levels of company & distributor. The tool comprises various sales functionalities like Order Booking, Collection, Delivery, Beat Planning, Schemes, Targets & Incentives etc.

Various basic dashboards & visual tools for Sales Ordering process are provided to the sales team to help in the following manner:

- Manage Field Sales Executive work to visit outlets effectively & efficiently
- Ensure outlets that provide minimum revenues are covered and eliminate others to keep fixed costs under control
- Ensure contribution ratios are managed. Ensure right/ focus products are promoted by Field Sales Executive
- Visual tools on Map for analysis to study sales (SKU X Volume/ Value) by regions

The key outcomes of the Distribution Diagnostics for the company are as follows:

- Sales analysis emanating from the actual transaction captured on the Sales Order tool
- Determine key strategies relating to distribution, merchandising and local level intervention
- Determine key issues faced by the Sales team
- Data visualization helps decision making at very short cycle time

In addition, advanced analytics are carried in the Diagnostic phase. Advanced analysis tools & techniques like Affinity Analysis, Sales Forecasting, Outlet Targeting through Pareto Principle, Sales Territory Alignment, Optimization & Mapping, Local Area Potential Estimation etc. are used to meet the business requirement of superior knowledge and insights for decision making.