

# Manufacturing Industry

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# Our Clients

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# Manufacturing Industry

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- The manufacturing industry deals with the manufacturing of finished new products from raw materials or essential parts.
- Many organizations find themselves in a place where they need to boost manufacturing performance and improve all the connected business processes fast but struggle with large upfront payments. LeadSquared is the perfect solution for them.
- Manufacturing solutions that include all the best practices of the industry can provide numerous advantages for companies, such as :
  - ✓ Time & Cost Savings
  - ✓ Easy Access
  - ✓ On-the-go Flexibility
  - ✓ High Security of Data

# Terminologies used In Manufacturing Industry

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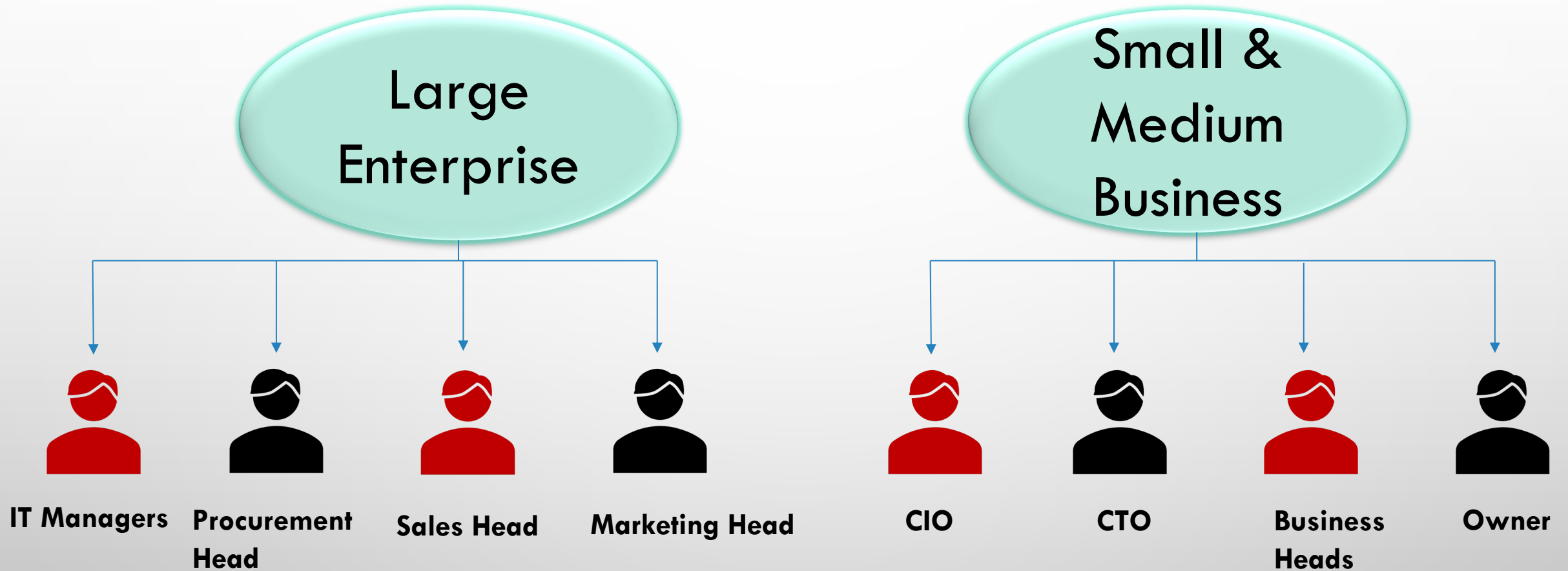
- **Approved Vendor List (AVL)**- A list of all the suppliers from which materials are purchased.
- **Bill of Materials ( BOM)**- A list of parts or items that make up a product **assembly**.
- **Computer-Aided Design (CAD)**-A wide range of computer-based tools that aid engineers, architects, and other design professionals in their design activities.
- **Correction Action Request (CAR)**- A change request that documents a crucial problem with a product.
- **Change Management**- The process of creating, reviewing, and getting approval for change requests, orders, and notifications.
- **Change Request**- Explains a problem and suggests a solution to remedy the problem.
- Distributor Management System( DMS)

# Terminologies used In Manufacturing Industry

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- **Engineering Bill of Materials (EBOM)**- It represents only the product created, not the packaging or the manufacturing materials used.
- **Engineering Change Order (ECO)**- The documentation describes a suggested design change.
- **Engineering Change Request (ECR)**- This change request details proposed improvements or issues with components or assemblies.
- **Field Failure Request (FFR)**- This change request describes a problem with a product observed in the field.
- **Good Manufacturing Process (GMP)**- It explains how to manage every aspect of production and testing that ensures product quality.
- **Indent**- Order placed by the Distributor.

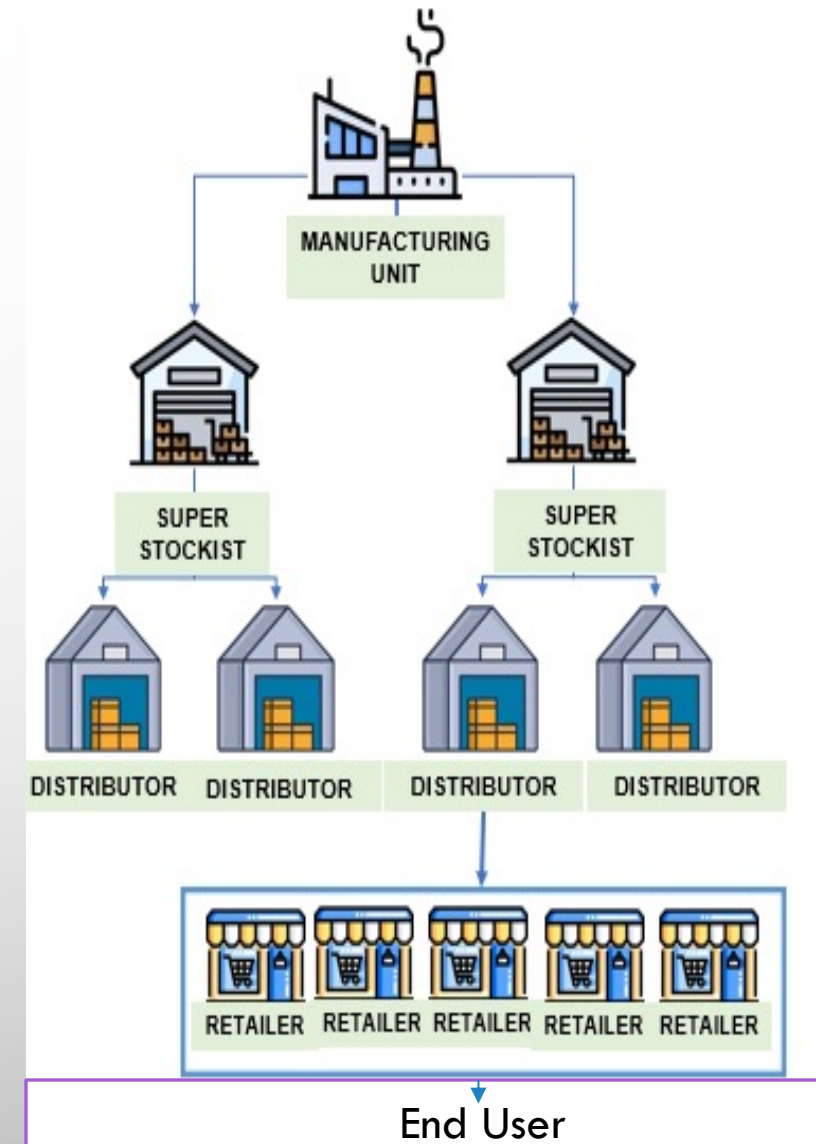
# Decision Makers in Manufacturing Industry





# Manufacturing Ecosystem

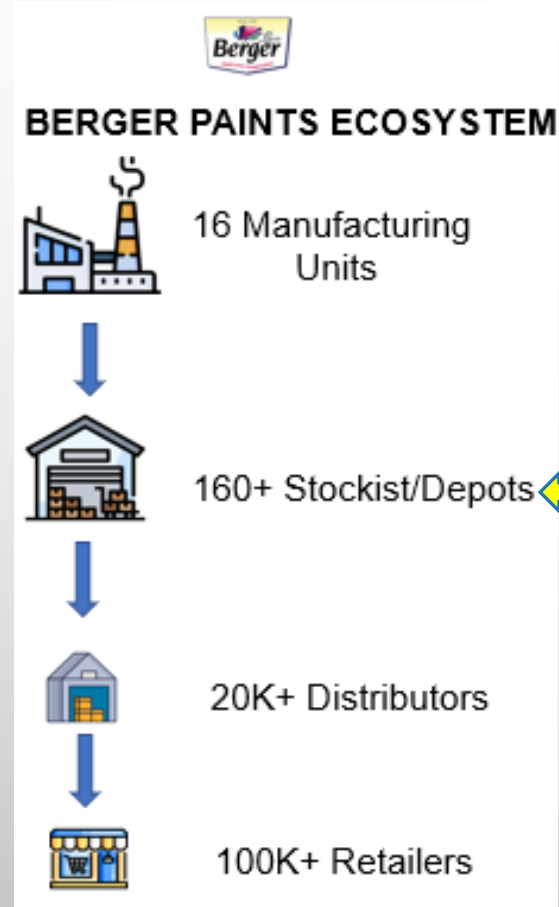
- The ecosystem starts with the manufacturing units or the plant where the actual production is done.
- Then we have super stockists or warehouses. It can be owned by the company or by some different business owners.
- Under super stockists, we have distributors, and under distributors, we have retailers. Mostly the retailers are tied up with a single distributor for a specific product.
- Dealers is another term that some of the industry uses. And dealers can be retailers for one business and distributors for another business.
- And the consumers go to retailers and purchase the products.
- A retailer & Distributor can go and sell different brands.
- But super stockists, if it is owned by a single OEM(Original Equipment Manufacturer), it will have a single brand product otherwise, it will have multiple brands.





# Examples of Manufacturing Ecosystem

## Berger Paints Ecosystem



They have Depots in place of Stockist

## Hindware



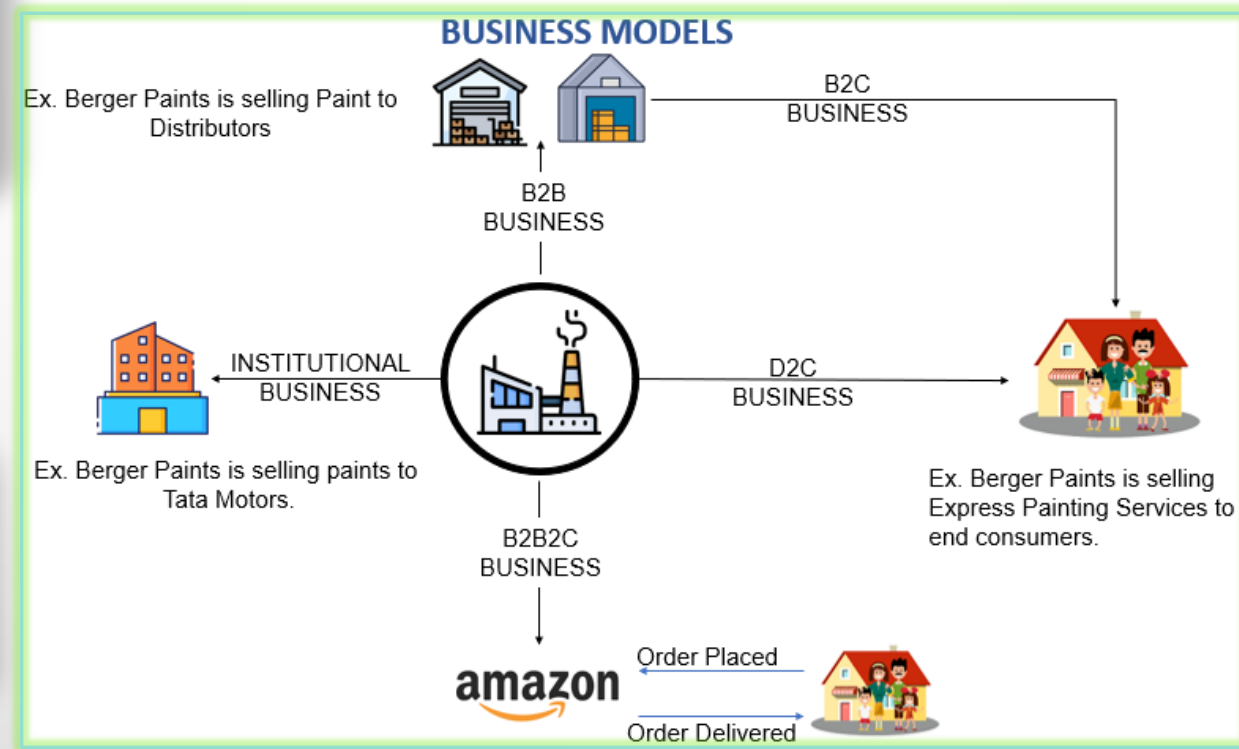
# Business Models

## B2B Business:

Whenever an OEM is selling its product to its distributor. It is a type of B2B business.

## Institutional Business:

These businesses sell to Gov. (Railways, Airports) or other large entities.



## B2C Business:

A retailer or distributor is selling its product to its consumer, it's a type of B2C business. B2C businesses sell their products to end consumers through any sales channel like Dabur

## D2C:

an OEM is directly selling its product to the consumer. Example-D2C companies sell their product directly to customers via outlets or websites without any intermediary. Examples- LensKart

## B2B2C:

Whenever an OEM is directly selling its product to the consumer.

# Sales Journey in Manufacturing Vertical

## Primary Sales:

- When a manufacturer/stockist sells the product to its distributors, it is a primary sale.
- Primary sales are used for revenue Calculations.
- Order placed by the Distributor is called "Indent."
- It is driven by Company employed Sales Team, i.e., Trade & Institutional Sales Teams.

## Tech Used:

- **ERP** (Enterprise resource planning) is used for Resource planning.
- Distributor uses **DMS (Distributor Management System)** for the indent Process.
- Once the order is placed on DMS & passes on to ERP, manufacturing units can operate as per demand.

## Secondary Sales:

- When a distributor sells to the retailer or projects (when a business buys in large amounts), it is a secondary sale.
- [LeadSquared finds the most fitment in secondary Sales.](#)
- It is driven by Company Employed Sales Team, i.e., the Retail Sales Team & Distributor Employed Sales Team.
- Retailer Schemes

## Tech Used:

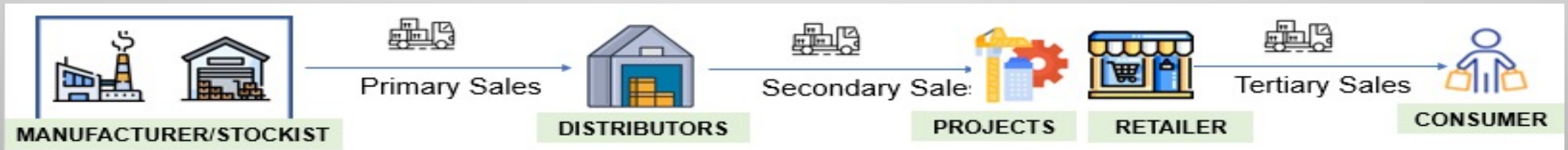
- Manual process for the Sales team therefore, no tech is involved.
- Retailers use the peripheral app or third-party apps through which they purchase the product & redeem points to earn discounts/rewards.
- Some DMS is also offering a Retailer App for order Punching.

## Tertiary Sales

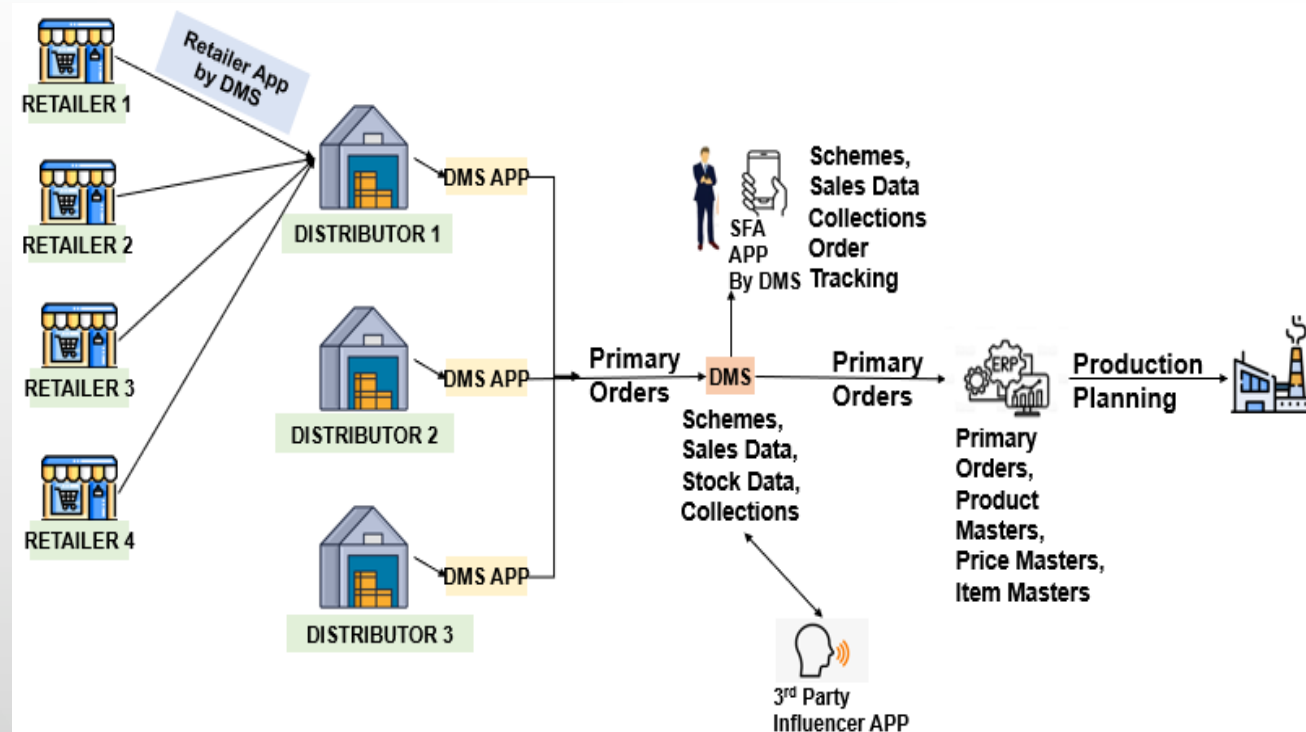
- When a retailer sells the product to consumer, it is a Tertiary Sale.
- It is driven by Brand Marketing, Influencers ( painters /Carpenter), Marketing, Experience Centres(where you can visit & experience the product).

## Tech Used:

- E-Commerce websites: Customer gets discounts on purchases.
- Influencer App: Influencers get points on every product purchase & they can redeem the points through this app.



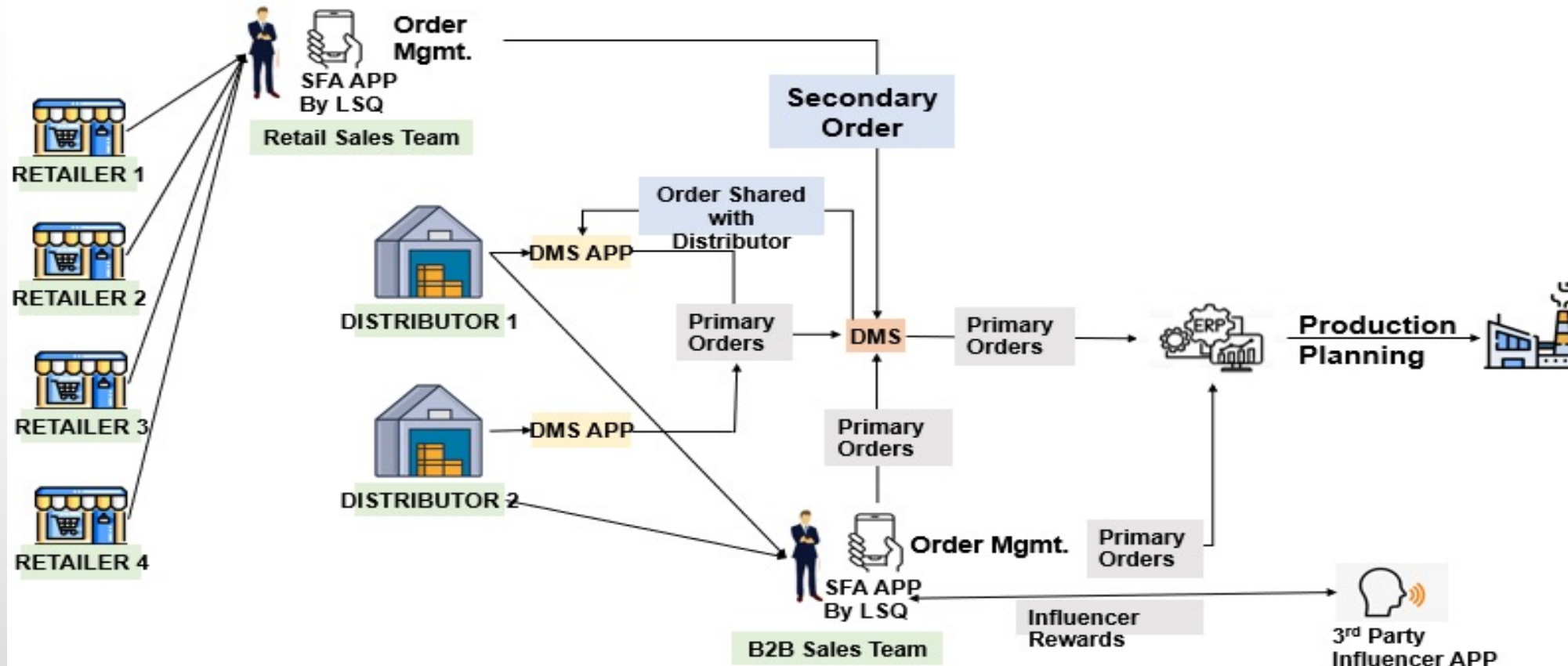
# Current ERP-DMS ecosystem



In the current ERP-DMS ecosystem:

- Retailers use the retailer app that the DMS provides to place an order.
- DMS is built so that whenever an order is placed, it is tagged to a particular distributor to deliver that order.
- Now, when the distributor wants to give the primary order (order to the company), they use the core DMS app (mobile apps or web platforms).
- By the DMS app, the company can track the schemes' sales data or any reports that DMS provides.
- DMS also offers SFA (Salesforce Automation Apps), where they can see which distributor is giving them the orders and what amount they must collect.
- Each agent will be mapped with a particular distributor.
- Some DMS are also integrated with the third-party app through which they can run some schemes.
- Once all the orders are accumulated, it is shared with ERP & in ERP company can visualize how much we need to go & produce.
- ERP & DMS are integrated. If there are price changes in ERP, the same will reflect in DMS.

# Greenply ecosystem with LeadSquared



- Greenply has a retailer Sales team that is responsible for retail business.
- LeadSquared SFA app can be provided to the Retail Sales Team so that they will pick up the order from the LSQ app from the module we have created.
- Once that is done, we can send the secondary order to DMS used by the particular manufacturer.
- From DMS, it should be shared with the distributor & the distributor can see the order on their app.

- We can enable the B2B sales Team so that they can also visit regularly to these distributors to bring in the order.
- In the existing system, the distributor can place the order on the DMS app, but the adoption of DMS for order placement is not that much in Tier 2, or 3 cities.
- So they would need an app for their B2B sales team to go to these distributors on sudden frequencies and bring in the order.
- LeadSquared is solving that purpose for them where the team is bringing the order, and once the orders are captured, we can send them directly to ERP.
- In Greenply, any orders that are captured from the distributor, is directly sent to ERP.
- LeadSquared SFA app is integrated with the third-party influencer app for Greenply, where every time a voucher is scanned by the painter. The respective Field Sales Team also gets notified of who has redeemed the points.
- In B2B sales or retail sales, Teams meetups are organized at the retail store where they will go on demonstrate the product launch and new schemes so that they can motivate these influencers to go and buy their products.
- The core requirement of manufacturing Industry is that the SFA apps should be capable enough to organize and manage the influencer meetups.
- And since the influencer meetup is a lead generation source so the new influencers who are earlier not part of the ecosystem, should be onboarded. LeadSquared has served this requirement.
- And finally once the order is shared with the ERP, it is sent to the Manufacturing unit for production planning.

**Note:** LeadSquared is the right fitment for the field sales use cases for the retail sales Team or B2B sales team or managing the influencer app or even the marketing.

All the standard offering that we have like tracking, attendance management will also be there.

LeadSquared is not helping for DMS or ERP apps.



# LeadSquared Fitments In Primary Sales Journey

## Problem Statement 1:

1. ERP's Licenses are expensive, and, in most cases, Sales Team doesn't have access to ERP hence they need an App where they can track their accounts(Distributors).
2. SFA offering by DMS Vendors are not Up to the mark.
3. SFA used in FMCG can not be used in Manufacturing.

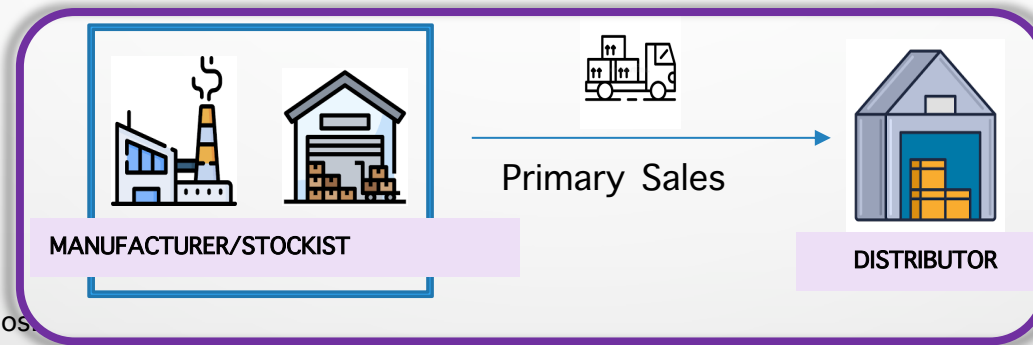


## LeadSquared Offering 1 :

LSQ Mobile App act as perfect SFA in above scenarios.

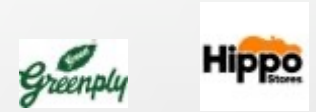
Key Modules Expected in SFA:

1. Beat Planning & Adherence Report.
2. TA/DA Management
3. Goal and Incentive.
4. Visit Tracking and Productivity.
5. Near Me and Territories.
6. Advance Reports via Sprinkle.



## Problem Statement 2:

Adoption of DMS is poor in rural areas and not all distributors are tech savvy.



## LeadSquared Offering 2:

1. For Such scenarios sales team can place the order on behalf of distributor using LSQ SFA Mobile App whenever they visit the Distributor. LSQ Integrates with ERP so that orders can be synced between both the system.
2. For this Approach we might have to integrate with DMS as well given Sales team wants see the order Placed by Distributors through DMS on their SFA App.



# LeadSquared Fitments In Secondary Sales Journey

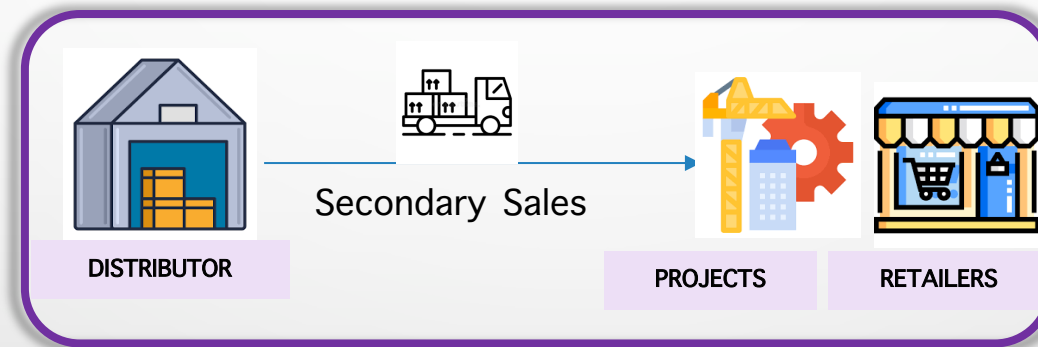


## Problem Statement 1:

Retailers are not using any App to place order hence either they call Distributor or sales team visit retailer and capture the order.

## Problem Statement 2:

SFA App for Institutional/Project Sales Team. These team connect with influencer to bring large orders. These Orders are catered by Distributors as well as Company based on order size.



## LeadSquared Offering 1:

We can offer LSQ App to Sales team for punching the order from retailer. Order captured by retailer can be shared with distributor using :

1. PDF or Mail
2. Integration with DMS and distributor can view the order on their DMS App

## LeadSquared Offering 2:

1. Project Site Management
2. Influencer Mapping
3. Order Management
4. Site Hunting

# LeadSquared Fitments In Tertiary Sales Journey

## Problem Statement 1:

Tertiary Sales are highly influencer Driven. Hence manufacturer wants to organize influencer meetups and spread brand awareness.

## Problem Statement 2:

Manufacturer spends heavily on Branding; hence there is a need for CRM to manage this branding Process.



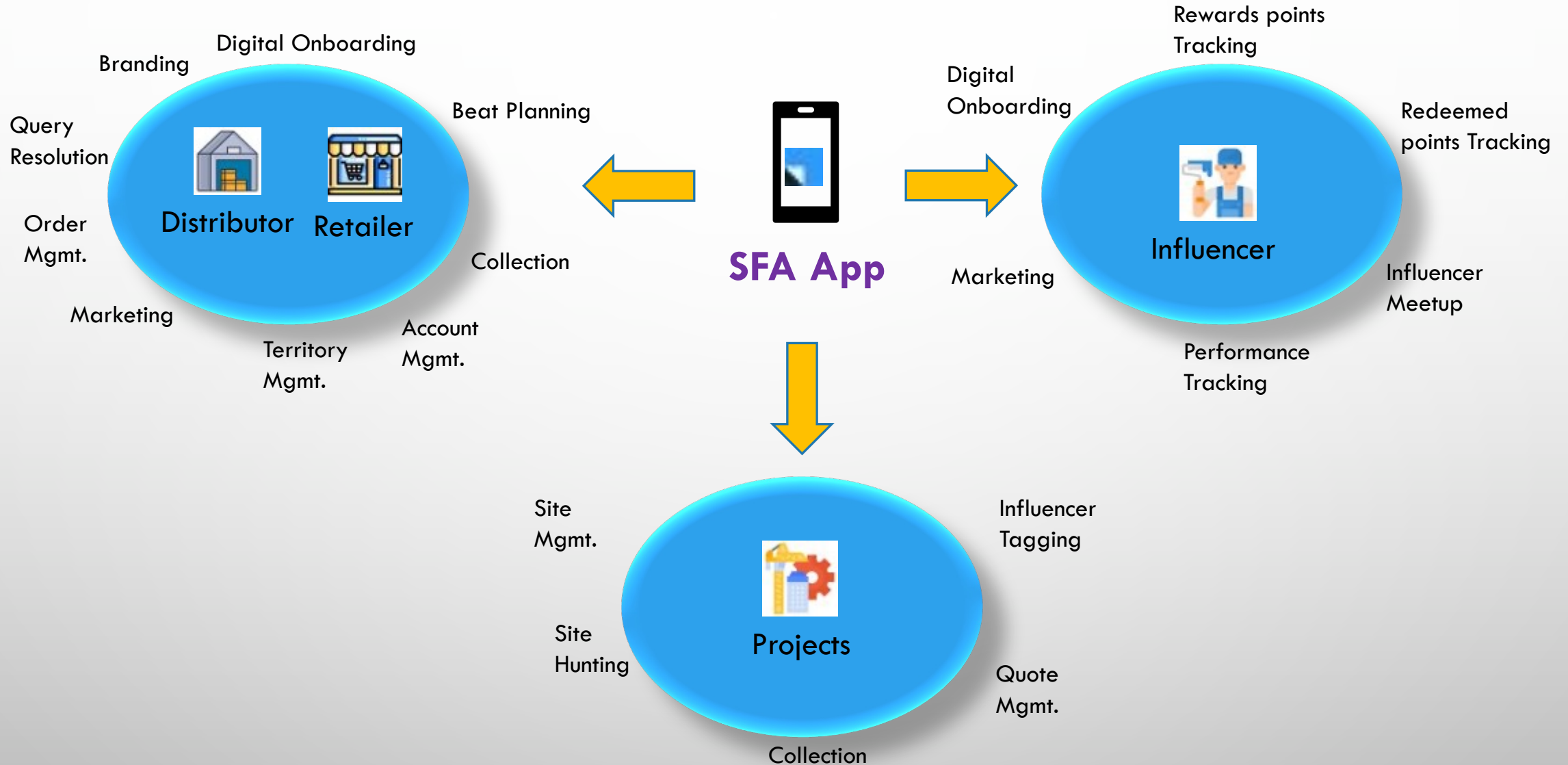
## LeadSquared Offering:

1. Retail Sales Team organizes these meetups at Retailer store to onboard new Influencers and get them registered on reward Programs.
2. Once registered, the sales team can track Reward Points earned and redeemed in LSQ SFA App. For this, we integrate with 3<sup>rd</sup> Party Influencer App.

## LeadSquared Offering :

LSQ handles end to End Branding Process. (Reece, Cost Estimations, Branding Sample Approval, Branding Executions)

# EAGLE VIEW- SFA APP



# Top Module Asked in Manufacturing

## 1. PJP( Permanent Journey Plan) / Beat Plan:

**Problem Statement:** FLS users create a plan for the coming month where they define on a particular day of the month what all retailers or distributors must visit.

Managers can review the plan, and once approved, visit tasks for all the users are created for respective days and dealers.

There are two approaches:

### Approach 1:

	A	B	C	D	E
1	Dealer Name	1st Visit Date	2nd Visit Date	3rd Visit Date	4th Visit Date
2	Dealer 1	Date 1	Date 8		
3	Dealer 2	Date 1	Date 8		
4	Dealer 3	Date 1	Date 8		
5	Dealer 4	Date 2	Date 9		
6	Dealer 5	Date 2	Date 9		
7	Dealer 6	Date 2	Date 9		
8	Dealer 7	Date 3	Date 10		
9					
10					



### Explanation-

In the first approach, the manager will upload this kind of excel sheet into the system.

Here the Dealer is the lead in the system. So here on date 1 the 1<sup>st</sup> visit task should be created and on date 8 the 2<sup>nd</sup> visit task should be created for the same dealer and so on.

So here we are defining how many visit the user will be doing in a month to a particular dealer.

Once this is done, we run a batch job, and all these tasks are created for the respective date for all the users.

## Approach 2:

A	B	C	D	E	F	G	H	I
KAM Email ID	Day 1	Day 2	Day 3	Day 4	Day 5	Day 6	Day 7	Day 8
KAM 1	Territory 1	Territory 2	Territory 3	Territory 4	Territory 5	Territory 6	Weekly Off	Territory 6
KAM 1	Territory 2	Territory 3	Territory 4	Territory 5	Territory 6	Territory 7	Weekly Off	Territory 9
KAM 2	XX	XX	XX	XX	XX	XX	Weekly Off	XX
KAM 3	XX	XX	XX	XX	XX	XX	Weekly Off	XX
KAM 3	XX	XX	XX	XX	XX	XX	Weekly Off	XX
KAM 3	XX	XX	XX	XX	XX	XX	Weekly Off	XX
KAM 4	XX	XX	XX	XX	XX	XX	Weekly Off	XX
	Example of Territory							
	Laxmi Nagar, Delhi							
	Chirag, Delhi							
	Ghitorni, Delhi							



### Explanation-

In the second approach, a particular user will visit territory 1 on Day 1.

The user will visit territory 2 also on day 1.

The territories could be Lakshmi Nagar and Chirag Delhi.

Now the manager will upload this excel sheet to the system and a batch job will be run that will search for all the dealers in the particular territory. Let's say we found that there are 10 dealers in territory 1.

Now we will create a task for the first day of the month, and we would require this type of sheet for the entire thirty days of the month and the task would be created for the users. KAM 1 is the owner of this particular territory.

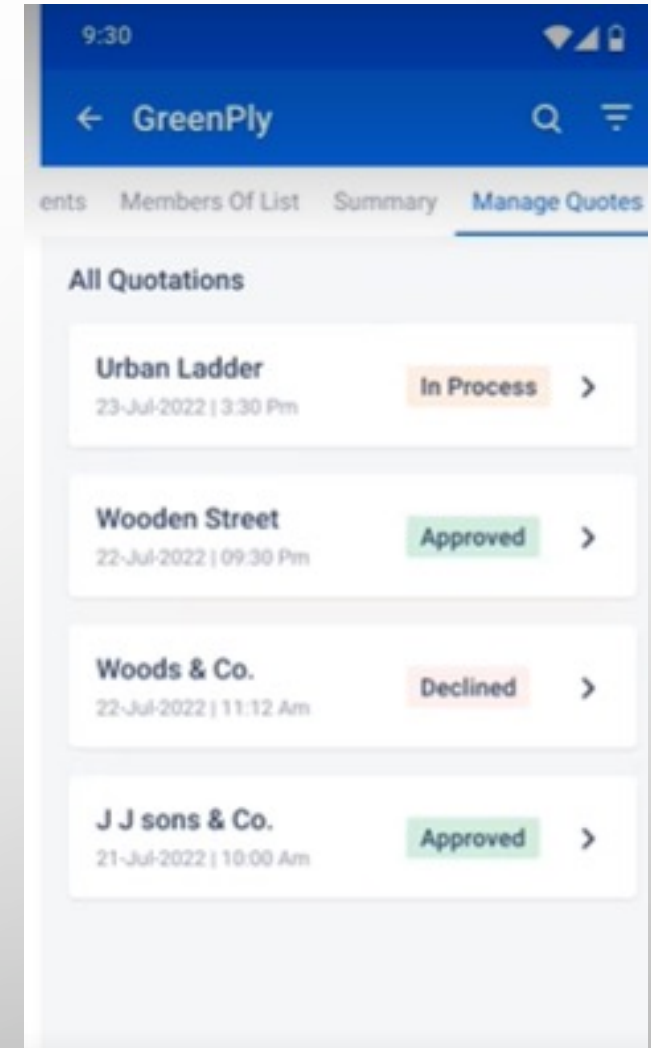
Territory = Fields of every Dealer.

# Top Module Asked in Manufacturing

## 2. Quote and Order Management:

There would be a field user who would go and visit a retailer and will take the order. And once the order is there in the system, it will be shared with the dealer. If the dealer agrees with the order, then there is a user called Branch commercial who is sitting in a particular branch and who will add the discounts on that particular order.

Order Management for an end user on mobile.







# Selling Modules in Manufacturing

Modules to Sell	Reason
<p data-bbox="86 282 512 325">Territory Management</p> 	<p data-bbox="1294 282 2430 439">Every Manufacturing customer works in the form of territory. They divide the entire country in the form of territory and sub-territory.</p> <p data-bbox="1294 454 2415 554">For example, if a lead is coming into the system, then they want to distribute the lead to the right set of the territories.</p>
<p data-bbox="86 588 428 631">Ace </p>	<p data-bbox="1294 588 2415 745">It is the End-to-End Sales Performance Solution that helps in tracking the targets assigned to the users and provides incentives as per the performance to motivate the users.</p>
<p data-bbox="86 836 843 879">Converse &amp; Carter </p>	<p data-bbox="1294 836 2364 879">We can leverage them for the existing call centre setups.</p>
<p data-bbox="86 968 428 1011">Mavis</p> 	<p data-bbox="1294 968 2415 1125">We need Mavis as in one form or another we need to save the product master or some kind of master in the manufacturing vertical.</p>
<p data-bbox="86 1159 593 1223">Sprinkle </p>	<p data-bbox="1294 1159 2346 1202">All the reports that they are looking are custom reports.</p>



# Modules not to Sell in Manufacturing Industry

Modules not to Sell	Reason
<p>Account Management</p> 	<p>Wherever account mgmt is required in the use case, it is done with the help of the lead entity in leadSquared. We are not using Account Mgmt anywhere because order entities are also created with Opportunities.</p> <p>You cannot create tasks, use forms &amp; mavis in Account mgmt.</p>
<p>Day Plan</p> 	<p>In Manufacturing, it's not like the users are visiting a particular customer at a particular time. The tasks are created like the user needs to visit these ten customers on Day 1. Therefore the day plan would not be applicable here.</p>
<b>Modules with Issues</b>	
<p>SIERA</p> 	<p>We shouldn't assume that all the reports that the customer is asking for will be available in SIERA.</p>
<p>Distance Travelled Connectors</p> 	<p>This is the module that is creating issues. There is probably 30-35 % inaccuracy in the data that our connectors are providing. The reason for these issues could be the issues with the mobile apps; users might have changed the setting in the app, etc.</p>

# THANK YOU

