COGNIZANI

Mobility impact on sales processes



"Quarter in the Life" of a Sales Team – Key Use cases

Sales Planning Detailed insights for Enhanced pre-execution planning Sales REP readiness **Analysis Plans & Goals Execution** Market reach, message and call Territory Planning, customer Call execution – Detailing, effectiveness analytics follow-up planning sampling, event invites Territory performance, sales Marketing calendar planning Marketing campaign execution team performance - cross-channel marketing, Sales goals & quota setting 360 degree customer view Sales dashboard & analytics Higher call effectiveness & more impactful marketing Constraint-free data access & campaigns prevention of data gaps Consistent insights fed for course **Data Accumulation Monitoring** correction and next cycle usage Contact profiles, sales figures, activity figures, Ground level competitive prospective marketing calendar insights On the move access to data via CRM Sales Performance analytics connectivity Campaign effectiveness analytics Goal tracking



"Mobility Day in the Life" of a Sales Rep in APAC – Key Use cases





More effective & impactful calls



HCP Interactions

- Digital detailing tools
- Sample drop and signature capture
- Speaker event invitation
- Real-time access to personalized resources that address HCP needs at point of call
- Stronger "Asking for the business" pitch owing to 360 degree insights

Enhanced Pre-Call Readiness



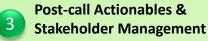
Pre-call planning & "insight capture"

- Call planning, target segmentation, call routing, reviewing prior visit notes
- Instant alerts and actionable insights for reduced rep analysis time
- Get "sense of business" at chemist shop and HCP insights via CRM engine



Eliminates Need to Travel to the Office

Improved Sales Effectiveness



- Call reporting & notes
- Update chemist on physician needs and record action items
- Check and update Personal Order Booking (POB) and inventory status with stockist/distrbutor
- Gather and report competitive intelligence on the ground

Tasks can be Performed on the Field



 Reduced unproductive administrative tasks during outof-field hours (e-mail, expense reporting, event management set-up, sample management reporting)

Reduced Need to Travel into the Office



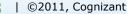
Training and Development

- Mobile tools for remote product learning and certification
- On-demand learning materials for skills enhancement

Reduces Time Out of the Field and Costly Travel Expense to Training Location







Area Business Planning & Monitoring Process

Raw Data Accumulation

Data Analysis

Planning / **Strategy**

Monitoring

Rep Performance

- Target Numbers
- Calls per day
- % Call frequency
- **Selling Skills**
- Product knowledge
- Relationship building
- Perf. Orientation
- **Business Intelligence**

Territory Performance

- Target Achievement
- Sales Coverage

Marketing Activity

Brand-wise activity

Rep Performance

- Target Achievement
- Effectiveness
- Activeness
- Capabilities

Territory Analysis

- Growth / Decline
- Brand Performance
- Customer Performance
- Observations

Marketing Activity

- Effectiveness
- Reach

Targets & KPIs

Objective /

Context Setting

- **Brand Goals**
- **KOL** targets
- Policy & Regulation observations
- Competition
- Team & Resources

- Territory Prioritization
- Sales Targets & Budgets
- Brand Plan
- Customer Management Plan
- Marketing Plan
- **Educational Support** Plan
- People Development Plan
- Distribution plan
- External Relations
- Other Key Activities

- Territory Monitoring
- Rep monitoring
- **Customer Monitoring**
- **Brand Monitoring**
- Marketing Activity Monitoring

Retrieve raw data from the backend and present for view Convert raw data into information, presented in an analytical manner

Set high level context & objectives

Design detailed plan

Enablement of access to monitoring data



Appendix



All about Territory Management

Territory - The land area in which a company operates and which a sales executive/rep is responsible for.

Levers of Territory Management – Planning, Organizing, Exectuting & Monitoring

Elements of Territory Planning

- a. setting objectives
- b. identifying resources and
- c. devising strategies

Sales Territory - Comprises of a number of present and potential customers located within a given geographical area and assigned to a salesperson or an intermediary

Reasons for Establishing Sales Territories

- a. Achievement of company's sales and marketing objectives
- **b.** Ensure better coverage Appropriate emphasis on more or less profitable customers
- c. Reduced selling costs No overlap in coverage; single rep accountability for customers
- d. Improved customer service Single rep accountability for customer service
- e. More accurate evaluation of performance



All about Territory Management

What Elements Determine A Territory?

- **a.** Present and potential customers and consumer;
- **b.** Geography;
- **c.** Competitors' activity;
- **d.** Reps responsible for the territory
- e. General economic situation of the area.

Best practices for Territory Design

- a. Area should have sufficient potential
- **b.** Area should be of reasonable size To reduce a salesperson's travelling time.
- **c. Adequate coverage -** is the salesperson able to service all accounts and able to meet new prospects?
- **d. Minimum impediments** try to set territories such that rivers, mountains, railroads, etc. set the borders of territories rather than run through the middle.

KPIs of Good Territory Design

- a. Improved customer coverage
- **b.** Reduction travel time and selling costs
- c. Provision of more equitable rewards
- d. Aids evaluation of sales force
- e. Sales increase
- f. Increase in morale



All about Territory Management

What Are the Elements of Territory Action Plans?

- a. Analyze your customers classify them and keep the classification up-to-date
- **b. Define your objectives by customer** break down overall objectives by customers and decide how to allocate your time among them to reach these objectives.
- c. Allocate territory time
- d. Plan your calls What kind of information do you need to plan your calls?
- e. Schedule your calls
- f. Plan your route Effective routing is based upon two elements: scheduling and frequency
- g. Evaluate your plan -Evaluation of a territory plan means to determine how effective it has been

Building Territory Strategies

- a. Maintain existing account cash cow
- b. Grow existing account
- c. Acquire new accounts



Planning & Monitoring Elements

Marketing

- Marketing Acitivity
 - Brand Wise
- Calendar Events

• Reps

- Sales Target
- Effectiveness
- Potential
- Activity
- Capabilities
- Achievement
- People Development Plan

Territory

- Performance
- Priority/Ranking

Customer

- Sales
- Marketing Activity Plan
- Educational Support Plan
- Action Plan
- Execution Follow up

Context

- Previous Quarter Observation
 - District performance
 - Brandperformance
 - Rep performance
 - Targeting effectiveness
 - Targets
 - Objectives
- Target & KPIs
- Brand Plan (Messaging)
- Selling environment (KOL, Regulations)
- Competitors
- Team

