



Brainex Case Study – 23 May 2018

People matter, results count.

Client Background

- **Our customer is one of the largest electrical distributors in the U.S. and in the world.**
- **A network of over 40 banners worldwide, 2,300 warehouses; 135 logistics centers; Over 30,000 employees.**
- **The organization combines productivity tools, large local inventories and dedicated product and applications specialists to get their customers the electrical supplies they need, when and where they need them.**
- **They offer more than 250,000 products from 200+ manufacturers worldwide.**
- **It provides the entire range of equipment necessary for installing and using electricity, mainly in residential, commercial and industrial buildings.**
- **The customer also supports projects for major industrial infrastructures (mines, oil rigs, etc.). Over the last few years, they have developed low-energy solutions (lighting and high-performance motors), as well as products using renewable energies, solar and wind power, geothermal and aero thermal energy (heat pumps, solar water heaters and climate control solutions).**

Leadership View – Problem Statement

- Customer's Business and Sales team is currently following a manual and tedious process to track and plan the sales done by the firm. They are monitoring and tracking their sales per customer on a monthly basis.
- To achieve this, customer's Finance team pulls the sales report from data warehouse at month end, creates individual scorecards (in spreadsheets) for each sales individual and distributes the same to the sales department from their division (Customer has 5 divisions in USA).
- Key items captured on the scorecard are:
 - customer wise current year YTD sales and Prior year YTD sales.
 - Year on year sales Variance and Customer wise targets for year (PLAN).
 - Run Rate of sales (RR) and Gross Margin in \$ & percentage,
 - Key action items/activities and Top vendors sales.
- Client CEO has a challenge and is looking for productivity improvement with automation in sales tracking and planning process. He wants to be able to pull on demand reports with various analytics to monitor the sales performance at any given time.
- Along with Capgemini, there are two other vendors Competitor – 1 and Competitor – 2 who are evaluating this opportunity critically and pitching for it.

Solution Expected & Our Proposal

Solution Expected:

- Customer is mainly looking for productivity improvement and automation in sales tracking and planning process.
- Need to come up with an IT solution, to replace the manual work and automate sales representative scorecards. Also build role wise logins (Division Manager, Branch manager, Sales person) and it should roll up the data at each upper level.

Proposed Solution:

- Our solution involves building a web portal having data inputs, interfaces with the warehouses as well as provides the following reporting capabilities:
 - CEO is given a division view (he can select any division or ALL divisions at once). Can drill down and view sales and gross margins per division and can see top performing divisions and top sales individuals within each division.
 - Division heads are given view of all the sales individuals within their division and their performance.
 - Individual sales personnel can view only his data with 3 years trend of sales and margins
- Our solution offers innovative and user friendly User interface with drill up and down functionalities and views as per user logins.

Service Scope & Technology Requested

Service Scope:

- An end to end application for inputting:
 - Sales targets definitions for every sales person
 - Sales achievement data for every sales
 - Feed this data to data warehouse on daily, weekly and monthly basis
 - Generate various different reports for sales performance
- All SDLC process:
 - Requirements
 - Design
 - Development
 - Testing
 - Implementation

Technology:

- Customer is open for any technology for building the centralized automated solution but it would be good if it has easy interfaces with the data warehouses that have been built in Oracle.

Modules & Key Milestones to Achieve

Modules to build:

- Logins and entry of the sales data – Targets and actuals
- Interfaces with the data warehouses
- Reports on the application:
 - Summary tab with total Current Year and Previous Year sales and Gross Margins – department wise and sales person wise.
 - Customer tab with customer wise sales details. (Customer, total sales current year, total sales previous year, gross margin in the current year and gross margin in the previous year)
 - Dashboard showing graphical representation of top and bottom 5 customers, pie chart of Sales and Gross Margin. (Year-On-Year)

Key Milestones:

- The application should support 100 US sales people' data for 5 years for approximately 250 customers within the USA.
- Tracking individual sales' performance is a key for the CEO and hence the application needs to be deployed very quickly in a quarter' time with all the functionalities in place.

Way Forward

- **Provide a brief of the Problem Statement in this case. (Be Creative)**
- **Do you think the Solution proposed in this case would solve the problem described ?**
 - a. If Yes, how ?
 - b. If No, why and what is your proposed solution for this problem?
- **What technologies do you recommend to implement the proposed solution and why ?**
- **Competitor - 1 is proposing a different Technology Solution. How do we convince the customer that our solution is superior than the Competitor's solution ?**
- **What are the risks involved in implementing this solution and what can be the mitigation plans ?**

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