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Technical Solution Design

KPI & Incentive calculation for CSO

Version 1.4

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# INTRODUCTION

Purpose of this document is described scope of work for a new feature whose technical specifications are being documented and describe desired outcome.

# VERSION HISTORY

|  |  |  |  |
| --- | --- | --- | --- |
| VERSION | DATE | CHANGE | BY |
| 0.1 | 20/11/2020 | Creating of document | Parthipan Rajagopal |
| 0.2 | 14/11/2020 | OEC and D-SSO updated | Parthipan Rajagopal |
| 1.0 | 16/04/2020 | Sign-off version | Romet Roosalu |
| 1.1 | 18/04/2020 | Interface file names corrected | Parthipan Rajagopal |
| 1.2 | 21/04/2020 | Added note and sample for partial incentive payment | Parthipan Rajagopal |
| 1.3 | 16/05/2020 | Added New KPI: Outlet with MOBO Balance;  Updated: MSA and RGU-GA | Parthipan Rajagopal |
| 1.4 | 29/06/2020 | Added New KPI: NOM & OTP | Parthipan Rajagopal |

# BUSINESS REQUIREMENTS

## Business Requirement Specification

KPI is a process for calculating achievements. Source data can be internal MOBII, External data (HADOOP and MOBO) or using upload achievement in MOBII. Below is the process for calculation.

## Business Reason & Impact

It reduces the manual effort for calculating incentive benefit and avoids manual email communications with field operators.

# CUSTOM KPI’S FOR CSO

CSOs are provided with direct incentives based on their performance on 4 different KPIs. A CSO will qualify for the incentive plan, only if he achieves achievement of 85% or more for each and every KPI. If not qualified in any one KPI then he will not receive any incentive for the summary period.

**Note: If Indosat wants to pay individual payment based on each KPI achievement then it must be created as separate incentive plans for each KPI)**.

Incentive amount can vary for each CSO based on their achievement score. Incentive amounts are calculated using below slab for all four KPIs.

|  |  |
| --- | --- |
| ACHIEVEMENT | INCENTIVE |
| >=105% | 110% of Incentive Value |
| >=100% to 105% | 100% of Incentive Value |
| >=95% to 100% | 80% of Incentive Value |
| >=90% to 95% | 70% of Incentive Value |
| >=85% - 90% | 50% of Incentive Value |
| <85% | 0 |

Indosat is currently having three KPIs for CSO incentive as per the latest May’20 policy document:

1. MOBO Sell-in Amount (MSA)
2. Outlet MOBO Balance (OMB)
3. Revenue Generating Unit - Gross Activation (RGU-GA)

The custom KPIs which are created as part TSD 1.2 still should be available if required it can be used in feature:

1. Outlet Effective Call (OEC)
2. Daily SIM Selling Outlet (DSSO)

## MOBO Sell-in Amount (MSA)

* This KPI will be updated based on latest policy requirement.
* Maximum Cap for achievement percentage is 120%
* Incentive value is 180000
* Target is mandatory for this KPI.
* If any CSO is not set with target then his achievement will be considered as zero.
* This KPI is developed as custom KPI using offline file interface from HADOOP
* The offline file is shared to MOBII path daily by HADOOP using interface Secondary MOBO (INTHDP003). File feed format is:

|  |
| --- |
| MPC\_CODE|DATE|ORGANIZATION\_ID|DEALER\_MSISDN|AMOUNT |

* This file contains summary of secondary MOBO transfer amount from MPC to Outlet.
* MOBII will identify the outlet based on given ORGANIZATION\_ID and given AMOUNT for the given DATE will be aggregated against identified outlet id.
* IF HADOOP shares the data for already shared date, then MOBII will replace the summary records with the latest file content
* If given ORGANIZATION\_ID must be outlet and mapped with CSO using operator mapping. Using operator mapping outlet achievement value will be accumulated to CSO.
* MOBII will not validate given MPC\_CODE from file.
* MOBII always identify the CSO based on outlet id. CSO will be identified based on operator mapping based on the particular month start date (KPI calculation month).

MOBO Sell-In Amount = Total MOBO injection to Outlet / Target.

**Example:**

*HADOOP sharing below data:*

*MPC\_CODE|DATE|ORGANIZATION\_ID|DEALER\_MSISDN|AMOUNT*

*MPC1|20200501|OUT1|6285773240240|50000*

*MPC1|20200501|OUT2|6285773240240|60000*

*MPC1|20200531|OUT1|6285773240240|40000*

*MPC1|20200531|OUT2|6285773240240|50000*

*Let us assume OUT1 and OUT2 is mapped with CSO\_A on start of the month which is 01-May-2020 then total actual Sell-In value of CSO\_A = 200000*

*Uploaded target for CSO\_A = 180000*

*MOBO Sell-In Amount = 200000/180000*

*= 111%*

*Incentive Value = 110% x 180000*

*= 198000*

## Outlet Effective Call (OEC)

Incentive is given based on the MOBII Journey Plan performance. This KPI is derived from two different custom child KPIs, where the achievement percentage is calculated with 50% weightage from each KPI.

* Maximum Cap for the achievement percentage is 100%
* Incentive value is 180000

Below are the two child KPIs which are calculated automatically by MOBII

### Plan vs Visit

**Target**:

Total number of planned calls plus ad-hoc visit (\*check-in at outlet location only) is considered as target for the CSO.

Plan + ad-hoc = visit target

**Example**:

*CSO1:*

*Planned PJP calls are 460*

*CSO visited outside PJP is 40*

*Total target for the month is 500*

### Achievement

Total number of visited calls as per PJP plus ad-hoc visit (\*check-in at outlet location only) is considered as achievement.

**Example**:

*CSO1:*

*Visited calls as per PJP is 360*

*CSO visited outside PJP is 40*

*Total achievement is 400 and achieved percentage is 80%*

**Note:** Due to daily target change CSO will see new target values every day (which may lead to many increase operational question)

### Effective Call

**Target**:

Total numbers of planned calls as per PJP plus ad-hoc effective calls are considered as target for the CSO.

**Example:**

*CSO1:*

*Planned PJP calls are 460*

*CSO visited outside PJP is 40*

*CSO made ad-hoc effective is 20*

*Total target for the month is 500*

### Achievement

Total numbers of effective calls as per PJP plus ad-hoc effective calls are considered as achievement.

**Example:**

*CSO1:*

*Effective calls as per PJP is 280*

*CSO made ad-hoc effective is 20*

*Total achievement is 300 and achieved percentage is 60%*

MOBO balance transfer 50K or Suggested value whichever is higher is considered as effective call in both PJP and ad-hoc visit.

**Note:** Due to daily target change CSO will see new target values every day (which may lead to many increase operational question)

## Daily SIM Selling Outlet (DSSO)

* This KPI achievement is aggregated using offline file interface Daily SIM Selling Outlet (INTHDP004) from HADOOP. File feed format is:

|  |
| --- |
| DATE|MICRO|SITE\_ID|ID\_OUTLET|QTY|AMOUNT |

* The offline file is shared to MOBII path daily by HADOOP. This file contains injected SP count against each outlet day wise.
* MOBII will identify the CSO based on mapping with given ORG\_ID and aggregates the unique number of ORG\_ID counts as SSO for the given DATE against identified CSO.
* Daily Achievement will be calculated as average between sum of daily count and month till date.
* Here SSO and moth till date will not include Holidays (as per holiday master) and Sunday.

**Example:**

*CSO1,*

*Total number of SSO is 300 (all days from month, let say 30 days)*

*Total number of SSO from non-holidays is 240 (ignore 6 days holiday)*

*D-SSO achievement is (240/24) = 10.*

* IF HADOOP shares the data for already shared date, then MOBII will replace the summary records with the latest file content
* If given ORGANIZATION\_ID must be outlet and mapped with CSO using operator mapping.
* HADOOP must send the actual file and control file to MOBII server path and both files must be compressed to .gz format. (MOBII standard for offline interface)
* Actual file name is mobii\_daily\_sso\_bi\_20200314.csv.gz and mobii\_daily\_sso\_bi\_20200314.ctl.gz.
* HADOOP must copy the actual file first and control file next both files should be delivered to MOBII path before 2 AM daily.

**Note:** Please refer interface INTDW033 for all interface details

## Revenu Generating Unit - Gross Activation (RGU-GA) with Injection

* RGU-GA Injection is that it must meet conditions according to the RGU-GA criteria with additional criteria Reload / package injection with a minimum injection of IDR 10,000 (accumulated)
* This KPI will be updated based on latest policy requirement.
* Maximum Gap for achievement percentage is 120%. Incentive value is 240000.
* Target is mandatory for this KPI. Target has to be uploaded to each CSO using CSO target template.
* If any CSO is not set with target then his achievement will be considered as zero.
* This KPI is developed as custom KPI using offline file data RGU-GA with Injection (INTHDP005), from HADOOP. File format is:

|  |
| --- |
| DATE|MICRO|SITE\_ID|ID\_OUTLET|STATUS\_INJECTION|FLAG\_ACM|COUNT\_MSISDN |

* This is created as a custom KPI in MOBII. HADOOP will share the RGU-GA qty grouped to ID\_OUTLET and FLAG\_ACM.
* MOBII will identify the outlet based on given ID\_OUTLET and given COUNT\_MSISDN for the given DATE will be aggregated against identified outlet id.
* IF HADOOP shares the data for already shared date, then MOBII will replace the summary records with the latest file content
* Given ORGANIZATION\_ID must be outlet and mapped with CSO using operator mapping. Using operator mapping outlet achievement value will be accumulated to CSO.
* MOBII always identify the CSO based on outlet id. CSO will be identified based on operator mapping based on the particular month start date (KPI calculation month).
* Below are the additional conditions will be used to considered final achievement.
* Achievement COUNT\_MSISDN will be considered only when STATUS\_INJECTION is injected and only following flag values from FLAG\_ACM.

b. >=25k - <35k  
a. >=10k - <25k

d. >=10k

c. >=35k - <50k

d. >=50k

**Example:**

*HADOOP sharing below data*

*DATE|MICRO|SITE\_ID|ID\_OUTLET|STATUS\_INJECTION|FLAG\_ACM|COUNT\_MSISDN*

*20200501|MC1|SITE1|OUT1|injected|d. >=10k |5*

*20200502|MC1|SITE1|OUT1|injected| b. >=25k - <35k|5*

*20200521|MC1|SITE1|OUT1|injected|d. >=10k |5*

*20200531|MC1|SITE1|OUT1|injected|d. >=10k |5*

*Let us assume OUT1 is mapped with CSO\_A on start of the month which is 01-May-2020 then total actual RGU-GA with injection value of CSO\_A = 20*

*Uploaded target for CSO\_A = 18*

*RGU-GA with Injection = 20/18*

*= 111%*

*Incentive Value = 110% x 240000*

*= 264000*

## Outlet MOBO Sell-In (OMB)

* Outlet with MOBO Balance (OMB) is the ratio of the number of outlets that have fulfilled / sold the MOBO balance in accordance with the recommended value or more compared to the number of outlets mapped to each CSO.
* This is created as a custom KPI in MOBII using MOBII internal data.
* Maximum Cap for achievement percentage is 100%. Incentive value is 180000.
* This KPI is calculated for weekly and weekly average is considered for monthly achievement.
* Only four weeks are considered in a month and the weekly OMB calculation is based on the calendar date as follows:

1st Week: date 1 to 7

2nd Week: 8 to 14

3rd week: 15th to 21st

4th week: 22nd to 30/31 (month end date)

* Following process used for calculating the weekly achievement.
* Sunday and National holidays are not included in calculation.

OMB = Actual Server Outlet (E from below table) / Total Outlet Mapping per CSO

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| No | Category | Mon | Tue | Wed | Thu | Fri | Sat | Sun | Total (excluding Sunday) | Unique Outelts from Total |
| A | Outlet fall under re-order suggestion | 7 | 8 | 7 | 9 | 6 | 7 | 8 | 44 | 42 |
| B | Outlets fulfilled from re-order suggestion | 4 | 5 | 3 | 6 | 3 | 2 | 0 | 23 | 20 |
| C | Non Fulfilled outlets (A-B) | 42-20 = 22 | | | | | | | | |
| D | Total Mapped Outlets | 61 | | | | | | | | |
| E | Actual Considered value (D-C) | 61-22 = 39 | | | | | | | | |
| F | Final Achievement (E/D) | (39/61) x 100 = 64% | | | | | | | | |

**Example:**

*Let us assume all four weekly achievements are respectively,*

*W1 = 64*

*W2 = 92*

*W3 = 90*

*W4 = 95*

*Monthly achievement is (W1+W2+W3+W4) / 4 = (64+92+90+95) / 4*

*= 85.25*

*Incentive Value = 50% x 180000*

*= 90000*

## 

## Number of Outlet Mapping (NOM)

* A new custom KPI should be developed by MOBII team called NOM (number of outlet mapping).
* For this KPI target will be uploaded for each MPC. Target unit is outlet count.
* Actual achievement is calculated based total number of outlets count which are mapped with CSO under MPC.
* Operator mapping consider based every month 5th data. Any changes in operator mapping after 5th of the month will not be considered as achievement.
* Total actual vs uploaded target is considered as cluster (Dealer) score and same will be applied to all CSO under that MPC organization.

**Sample Calculation:**

|  |  |
| --- | --- |
| MPC1 | |
| Active CSO | 10 |
| Active Outlets | 1000 |
| Target Uploaded | 550 |
| CSO Name | Operator Mapping Count at 5th date |
| CSO1 | 50 |
| CSO2 | 60 |
| CSO3 | 20 |
| CSO4 | 0 |
| CSO5 | 70 |
| CSO6 | 45 |
| CSO7 | 55 |
| CSO8 | 60 |
| CSO9 | 60 |
| CSO10 | 60 |
| Total Mapped Outlets | 480 |

From above table:

MPC NOM score is = 480/550

= 87.27%

**All 10 active CSO will be applied with KPI score 87.27 %**

## Outlet SP Tagging Participants (OTP)

* A new custom KPI should be developed by MOBII team called OTP (Outlet SP Tagging Participants).
* For this KPI target will be uploaded for each CSO. Target unit is outlet count.
* Actual achievement is calculated based total number of outlets count which are having SP tagged quantity 10 or more in a particular month.
* SP tagging data will be shared by MOBO/HADOOP to MOBII using offline interface.
* Proposed file format is,

DATE|OUTLET\_ID|SP\_TAG\_QTY

* MOBII will aggregate the given SP\_TAG\_QTY value against given OUTLET\_ID for given date.
* While calculating achievement, Outlet which is having aggregated sum for SP\_TAG\_QTY is 10 or more will be counted for CSO achievement. CSO will be identified based on operator mapping (as on 5th date of the KPI month).
* Total actual vs uploaded target is considered as CSO final achievement for the month.
* Sample Calculation,

Sample interface files data like below,

**Example:**

|  |
| --- |
| DATE|OUTLET\_ID|SP\_TAG\_QTY  20200501|OUTA1|8  20200501|OUTA2|2  20200501|OUTA3|20  20200531|OUTA1|4  20200531|OUTA2|7  20200531|OUTA3|10 |

Let us consider CSO-A is set with target 2 and having operator mapping with OUTA1 and OUTA2 at 5th of May month. From above surrounding file, outlet wise aggregation is:

OUTA1 = 12

OUTA2 = 9

OUTA3 = 30

CSO-A is having only mapping with OUTA1 & OUTA2 so OUTA3 will not be counted for actual.

OUTA2 is having less than 10 SP\_TAG\_QTY so OUTA2 will not be considered for actual

**CSO OTP score is = 1/2**

**= 50%**

## Outlet Mapping (Operator Mapping)

To qualify for incentive CSO must serve minimum N (45) number of outlets and this eligibility will be built as a separate KPI and use in plan definition as part of qualification criteria.

## Ranking

Ranking of the CSO is calculated based on the total score of these four KPIs, the KPI weightage is used like below.

MSA – 30%

OMB – 30%

RGU-GA – 40%

National level ranking, Regional level ranking, Cluster level ranking shall be calculated.

# INTEGRATION INTERFACES

Below new interfaces will be used to calculate the achievement values. Separate IDD document has to be created for this.

|  |  |  |
| --- | --- | --- |
| INTERFACE ID | NAME | DESCRIPTION |
| INTHDP003 | Secondary MOBO | All MOBO transactions summary from MPC to Outlet |
| INTHDP004 | RGU-GA with Injection | RGU-GA summary count for outlets |
| INTHDP005 | Daily SSO | Daily SSO count against CSO |

# ANNEXURES

## Appendix A: Open Issues

In this section are all unresolved issues, TBDs, pending decisions, findings required, conflicts, etc.

|  |  |  |  |
| --- | --- | --- | --- |
| ID | DESCRIPTION | RESPONSIBLE | STATUS |
|  | Final data feed requirements will be defined in “Integration with HADOOP IDD” document  **Solution**: IDD document with HADOOP is finalized | Parthipan | Solved |

# APPROVAL SIGN-OFF

I have received soft copy of current version document via e-mail, reviewed and approved confirm with reply to e-mail and as undersigned, I change request and agree that it’s appropriate:

|  |  |  |
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## E-mail approval screen captures

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