CEAT Sales Forces Dashboard Regional Service Manager - UX Document

Version. 01

Date: 17 January 2019

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RSM

Sales Force Portal

Regional Service Manager will log in to do their day to day task and reporting.

RSM - 3 kinds of customers
- Dealers
- OE Dealers
- Fleets
- Influencers

Daily Work Management

The user has defined a PJP as per his Monthly & Annual Planning.
based on this he will achieve his target.

Customers

RSM - 3 kinds of customers
- Distributors
– DSE
- Sub- Dealers
- Leads(Sub-dealers)

Planning

RSM does a year & Monthly planning and based on this he defies his PJP and works on his target

Reports

This a repository of all the reports that he refers to obtain his goal

Marketing

PJP

His PJP is Pre-defined(by him), he now goes on the field

Dealer

He visits each of the dealers as per his PJP and checks the on-their status of business with payments, orders & Claims/Complaints

OE Dealers

He visits each OE Dealers as per his PJP and checks the on their status of business such as Targets, Payments, orders & claims/complaints

Fleets

He visits each of the fleets and also sells the brand also check does the inspection on the tyre.

- 1 Landing Page
  - 2 Dashboard (Default view)
    - 3 Direct Fleet Plan vs Actuals (Every Month)
    - 3 Complaint TAT
    - 3 Incentive Tracker
    - 3 Dashboard Score
    - 3 Outstanding tile View
  - 2 DWM
    - 3 PJP
    - 3 Digital Initiatives
    - 3 My Performance
  - 2 Customer
    - 3 Dealer
    - 3 Fleets
    - 3 OE Dealers
    - 3 Complaints
    - 3 Claims
  - 2 Planning
    - 3 PJP Planning
    - 3 Monthly Planning
    - 3 Yearly Planning
    - 3 DAP
  - 2 Report
  - 2 Marketing
    - 3 Leads
    - 3 Branding Status
    - 3 Campaigns
    - 3 Schemes
    - 3 competitor Analysis
    - 3 e-Catalog
    - 3 Price List
    - 3 Sales Promotion
  - 2 Support
    - 3 Regional Team
    - 3 Company Directories
    - 3 Escalation Matrix
    - 3 Broadcast Message
    - 3 Marketing Collateral
    - 3 User Manual

2 Report

3 Dealer

- 4 Dealer, distributor and sub dealer spot inspection and spot replacement
- 4 Number dealers and sub dealers are authorised and using authority.
- 4 Dealer business card

2 My Reports

- 4 Claims register
- 4 Halla bol list
- 4 WA reports
- 4 WA trends
- 4 Reinspection at CFA level (variation report)
- 4 PJP Plan Vs actuals
- 4 Incentive tracker
- 4 Dash board score
- 4 Pending complaint status
- 4 Stock visibility
- 4 Claim rejected customers
- 4 MHN : SPEC.KTB reports
- 4 SPK reports

2 Fleet

- 4 direct fleet plan vs actuals every month
- 4 FSS p1 and P2 customers with monthly offtake
- 4 Tyre tracking reports
- 4 Scrap tyre inspection report
- 4 Business card updation
- 4 PJP plans v/s actuals
- 4 FSS SKU wise sales
- 4 Fleet business card

2 Initiatives

- 4 warranty registration dealer wise
- 4 Digital initiatives

CEAT Sales Forces Dashboard - RSM
Dashboard & Report Navigation

Table of Content

Wireframe

2.0.0 RSM - Landing Page 05

2.1.1 RSM - Reports - Dealer 06

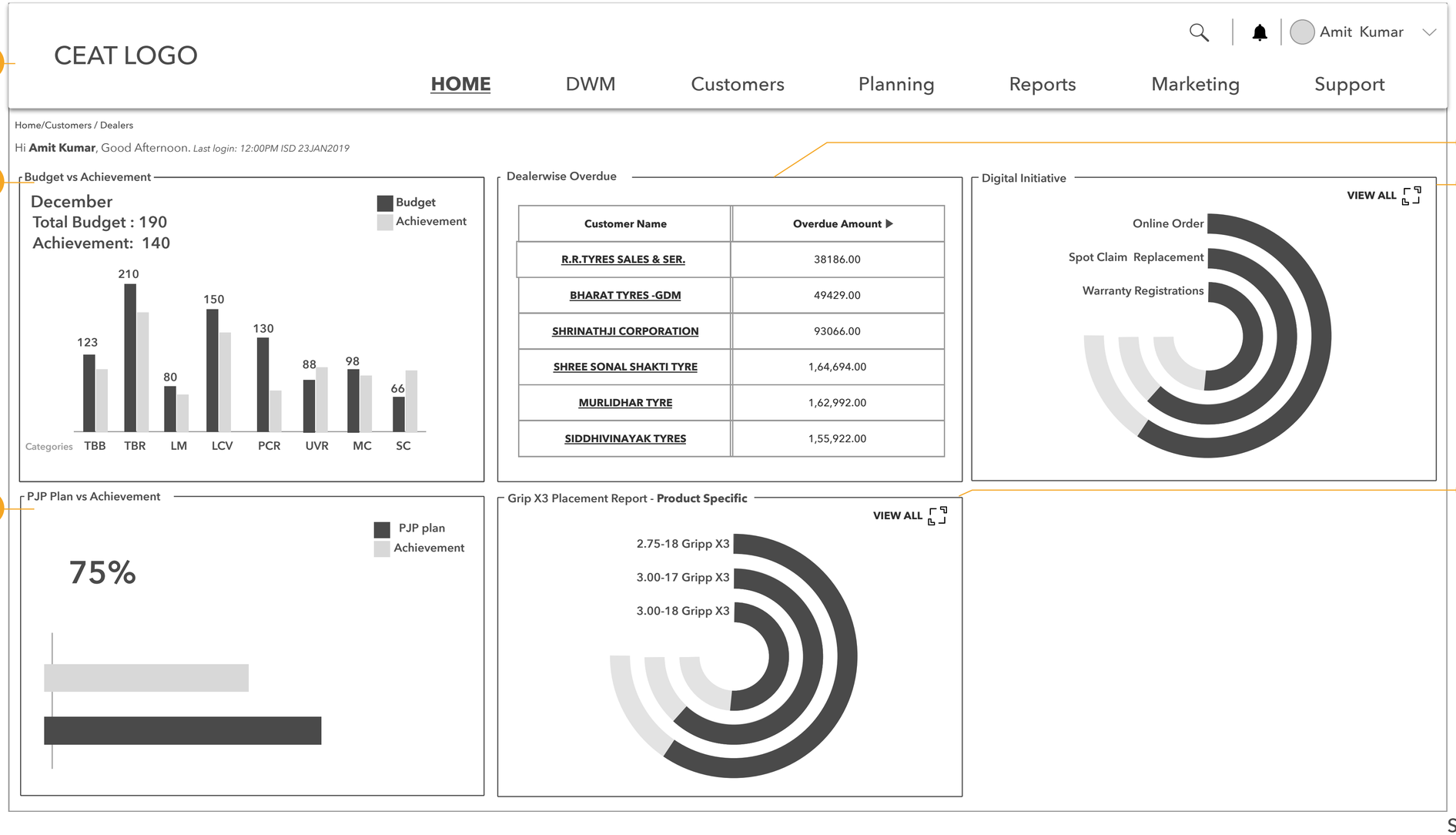
2.1.2 RSM - Reports - My Reports 07

2.1.3 RSM - Reports - Fleets 08

2.1.4 RSM - Reports - initiatives 09

Page Break - My Customer Flow 12

Screen Resolution 1366×768

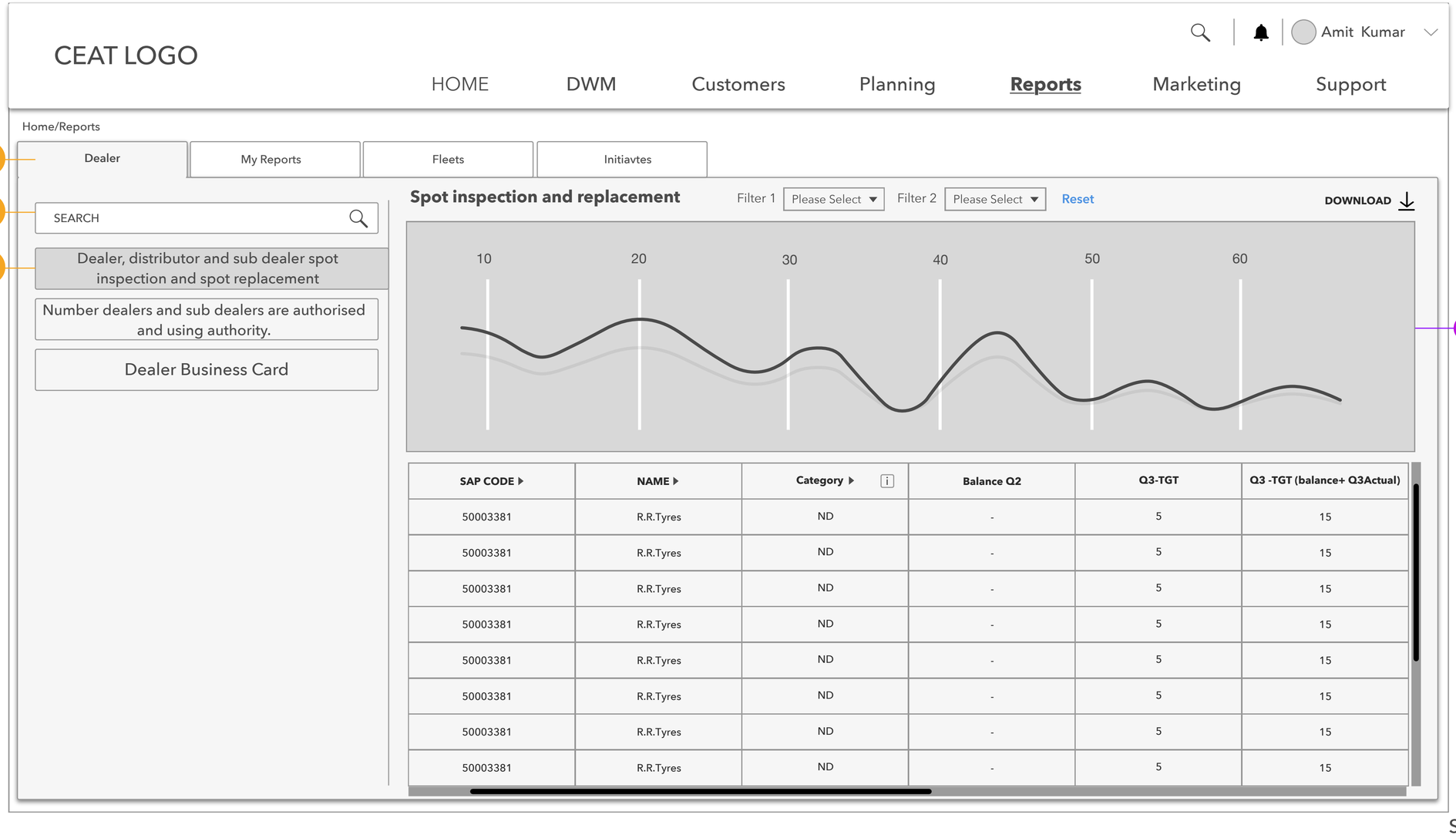


Annotations

1. Top Navigation as per sitemap (To be updated as per business) Key Navigation L1
2. Budget vs Achievement
   Snapshot view of Budget plan and achievement for each category
3. PJP plan vs Achievement
   - The PJP for each week and achievement as per the current date
4. Dealer Wise Overdue
   - This is tabular data of dealers of their overdue
   The arrangement is as per the priority of payments to be made
5. Digital Initiatives
   The Current initiatives that are running their acceptance rate in the market is shown here.
6. Product Placement
   The Current product placement in marktet and their performance.

Screen Break

Screen Resolution 1366×768



Annotations

1 Sub- Navigation of Reports
These reports are bucketed as pe their usage.

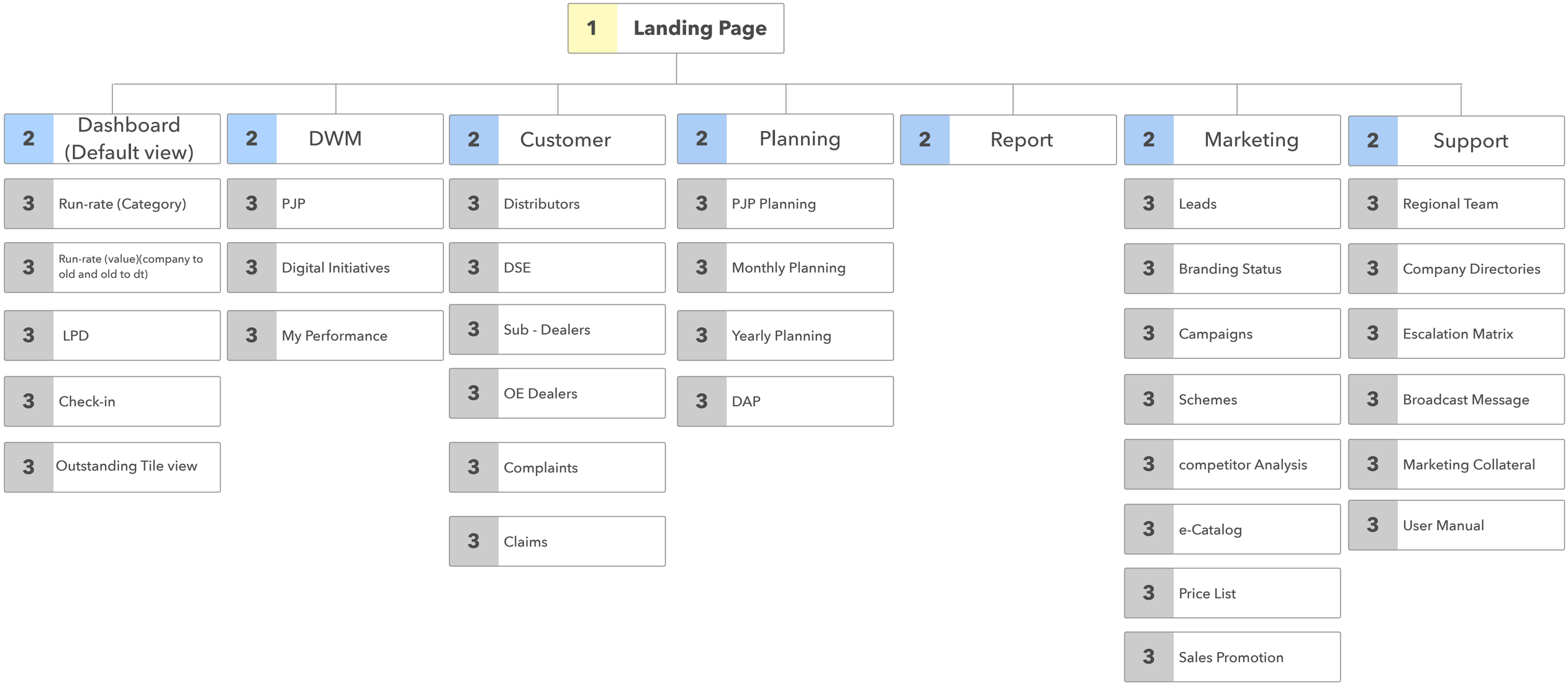
2 Dealer Report - Specific Search for each report in this category

3 BPLOU VS Achievement (Dealer)
- This a Report with Snapshot view visible by default

TL can filter specific to the current report and Download the report for as per their use.

A Chart View - Depends on Quarterly view or Monthly view Based on the business call,
This can be an applied view on all other sub tabs based on business requirement.

Screen Break


1 Landing Page
2 Dashboard (Default view)
3 Run-rate (Category)
3 Run-rate (value)(company to old and old to dt)
3 LPD
3 Check-in
3 Outstanding Tile view
2 DWM
3 PJP
3 Digital Initiatives
3 My Performance
2 Customer
3 Distributors
3 DSE
3 Sub - Dealers
3 OE Dealers
3 Complaints
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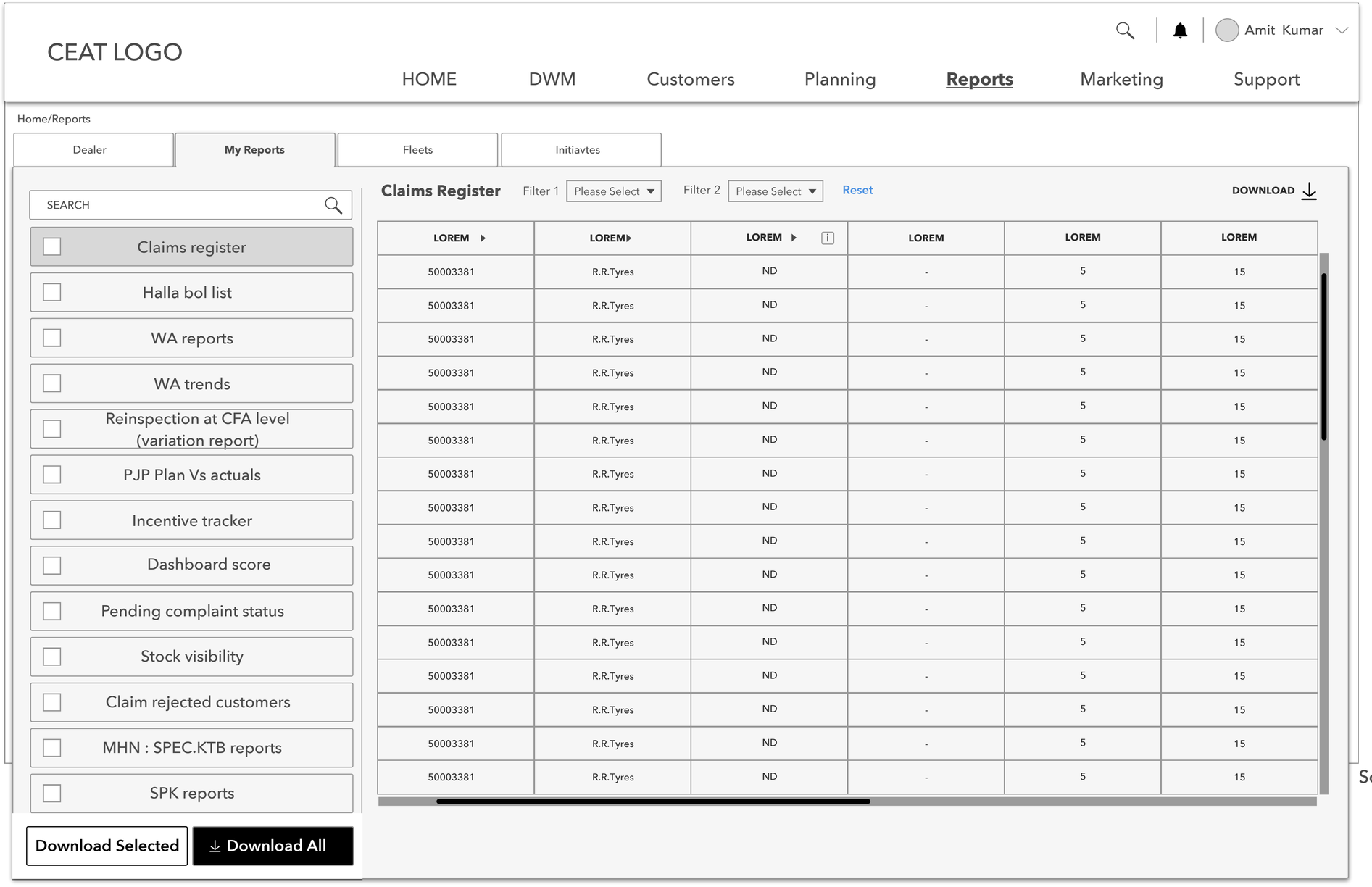

Annotations

1 My Report - View

By Default the user can view the a report on Priority in the data preview.

Screen Break

Screen Resolution 1366×768

CEAT LOGO

HOME DWM Customers Planning **Reports** Marketing Support

Amit Kumar

Home/Reports

Dealer | My Reports | **Fleets** | Initiavtes

SEARCH

- Tyre Tracking
- Scrap Tyre Inspection - FSS & Fleet wise
- SPK
- MHN: SPEC.KTB
- Halla Bol List
- Businesses Card
- Fleet Pricing

Tyre Tracking Report Filter 1 Please Select Filter 2 Please Select Reset DOWNLOAD

Customer Number	Customer Name	Vehicle No.	Tyre brand	Tyre Pattern	Wheel Position
50003381	R.R.Tyres	ND	-	5	15
50003381	R.R.Tyres	ND	-	5	15
50003381	R.R.Tyres	ND	-	5	15
50003381	R.R.Tyres	ND	-	5	15
50003381	R.R.Tyres	ND	-	5	15
50003381	R.R.Tyres	ND	-	5	15
50003381	R.R.Tyres	ND	-	5	15
50003381	R.R.Tyres	ND	-	5	15
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50003381	R.R.Tyres	ND	-	5	15
50003381	R.R.Tyres	ND	-	5	15
50003381	R.R.Tyres	ND	-	5	15
50003381	R.R.Tyres	ND	-	5	15
50003381	R.R.Tyres	ND	-	5	15

Screen Break

Annotations

1 Filter view - interaction
This is a sample view of the filter not an actual data.

Filter 1: Customised

- Brand → Brand 1, Brand 2, Brand 3, Brand 4
- Customer
- Wheel Position
- TBB/TBR

Filter 2: Lorem

- Lorem 1 → Front Right, Front Left, Left hand side back, Left hand side back
- Lorem 2
- Lorem 3
- Lorem 4

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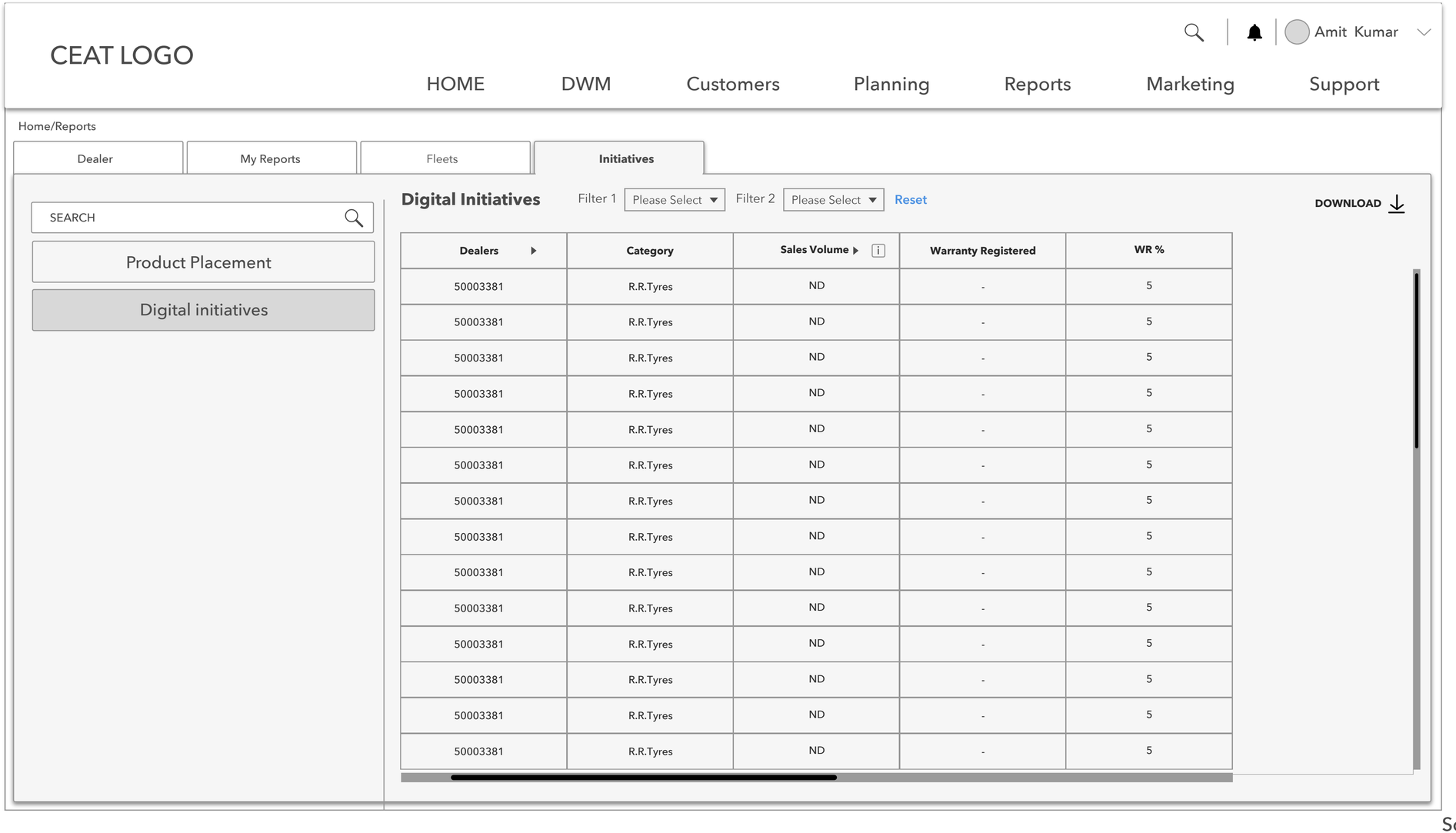

Screen Break

Annotations

1 Initiatives View
Limited columns view

Empathy Mapping

3 Month Sales

Stock Report

SAYS

Time Taking and he wants it real time

THINKS

Stock Report

It is important to update my dealer for the stock availability

Ravi Kiran

User

DOES

Stock Report

he gets the report from RM or CFA

FEELS

Stock Report

Over Process
- Not Transparent