**Product & Coverage**

1. Readership Dashboard

* Define specific requirements for the enhanced readership dashboard and obtain feedback from stakeholders to ensure their needs are met.
* Conduct thorough analysis of the data from CRM to identify and resolve existing issues.
* Work closely with RAD & Pune tech team to develop the required views for analysts, managers, and sales teams.
* Conduct user testing and gather feedback to ensure the dashboard meets the needs of different stakeholders.
* Develop user guides and training materials to ensure the smooth adoption of the enhanced dashboard.

1. Product Score Card

• Conduct a thorough review of the current product scorecard report to identify areas for improvement.

• Consult with relevant stakeholders to identify any changes to be made, such as the change in SRI score.

• Update the report design and content to reflect the changes and improve its usefulness for decision making.

• Conduct user testing to ensure that the updated report is well received and meets the needs of stakeholders.

• Develop user guides and training materials to ensure that stakeholders can effectively use the updated report.

1. Consumption Stats Report

• Conduct a thorough review of the current consumption stats report and identify areas for improvement.

• Define specific requirements for the enhanced report and consult with stakeholders to ensure their needs are met.

• Work with relevant stakeholders to identify and integrate data sources required for the automated workflow.

• Develop and test the automated workflow, ensuring that it is robust and efficient.

• Develop user guides and training materials to ensure that stakeholders can effectively use the automated report.

1. Readership Data

• Conduct a thorough analysis of the current readership data to identify inconsistencies and issues.

• Develop and implement a data quality control process to ensure consistent and accurate data flow.

• Work with relevant stakeholders to ensure that data is correctly entered and maintained.

• Conduct regular audits of the data to identify any issues and take corrective actions as necessary.

• Develop user guides and training materials to ensure that stakeholders can effectively use the readership data.

1. Regular reports

• Develop a reporting schedule and ensure that all team members are aware of the deadlines.

• Implement a quality control process to ensure accuracy of the reports.

• Ensure that any issues that arise are addressed promptly to avoid delays.

• Develop contingency plans for unexpected delays to ensure that reports are delivered on time.

• Develop and implement a data quality control process for all reports.

• Ensure that all reports adhere to MIS style guidelines.

• Conduct regular audits of the reports to identify any issues and take corrective actions as necessary.

• Work with relevant stakeholders to ensure that reports meet their needs and are effectively used.

1. Cross training

• Develop a cross-training program for all team members.

• Ensure that all team members receive training on all reports and processes.

• Provide opportunities for team members to practice using the reports and processes.

• Conduct regular assessments to ensure that team members are effectively cross-trained.

**Client Feeds & Broker Votes:**

Oversee Broker Votes, Proxy Votes & APL workflow:

* Ensure existing system to track and manage broker votes and proxy votes received from various sources are received and processed in a timely manner with accuracy and completeness.
* Coordinate with stakeholders to ensure that broker votes and proxy votes are properly reviewed and scored according to established criteria.
* Develop and maintain a database of broker votes and proxy votes to facilitate analysis and reporting.
* Prepare regular reports and presentations on broker votes and proxy votes, highlighting key trends and insights for senior management.

Review Existing BV Processes and Eliminate Dependency on RAD:

* Conduct a thorough review of existing processes and systems to identify areas of inefficiency or dependence on RAD.
* Work with stakeholders to develop and implement new processes and systems that reduce reliance on RAD and improve overall efficiency.
* Identify and prioritize opportunities for automation or process improvements to reduce manual effort and increase productivity.
* Develop and implement a plan to transition away from RAD while maintaining continuity of operations and data quality.

Collaborate with Stakeholders to Improve Analyst Scorecard:

* Work with stakeholders and Akhilesh to review and improve the logic used to calculate scores for associates.
* Develop and implement a semi-annual scorecard review process to ensure that scores accurately reflect performance and are aligned with business objectives.
* Develop and implement a plan to communicate scorecard results to associates and provide coaching or feedback as needed.
* Monitor and analyze scorecard data to identify trends and areas for improvement, and work with stakeholders to implement corrective actions.

Develop Workflows for Account Level Broker Votes and APL Dashboard:

* Work with stakeholders and Akhilesh to develop and document workflows for account level broker votes and APL dashboard development.
* Collaborate with RAD to ensure that workflows are properly integrated into existing systems and databases.
* Develop and implement a training program for employees to ensure that they understand and can properly execute workflows.
* Monitor and analyze workflow data to identify trends and areas for improvement, and work with stakeholders to implement corrective actions.

Develop an Effective Sales Broker Vote Tool:

* Develop and implement an effective process to leverage existing setup for capturing broker votes.
* Establish and run a review or confirmation process for the ranks that are tracked to ensure accuracy and completeness.
* Systematically pull rank data from vote files and enter it into the sales broker vote tool.
* Update and review the sales broker vote tool within 5 days of receiving call reports in CRM.
* Review data entered by CM/RM/Sales for consistency and accuracy.
* Provide regular and ad hoc MIS reporting to stakeholders.