



Pon Pure Chemicals Group

Catalyzing Your Growth



PONPURE SALESPLAYBOOK
(PPSPB)

VERSION 1.06

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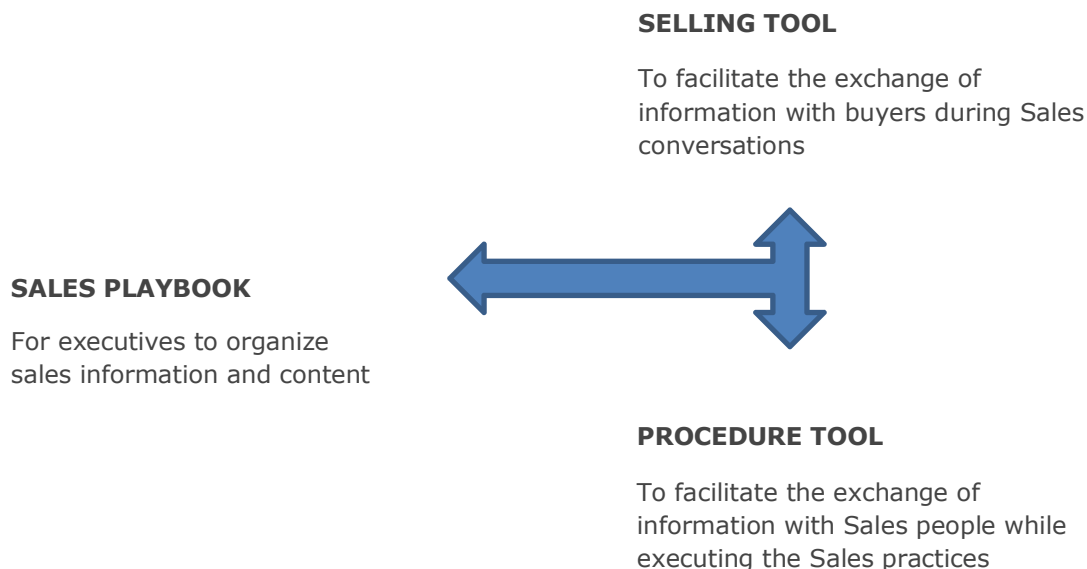
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INTRODUCTION

The sales landscape is changing every day. One of the biggest changes outside of the way buyers are buying is the need for a playbook. Sales playbooks have been around for decades through various means and are now considered to be an integral part of sales enablement strategies that are designed to make sellers more efficient and effective. Best-in-class companies use sales playbooks, leading to higher customer retention rates, higher conversion rates, additional sales groups achieving their quota, efficient and consistent on-boarding of new sales reps, associated an accelerated sales process. In summary, Pon Pure Chemicals (PPC) India Private Limited has conjointly spent quality time in building this Sales Playbook. PPSPB (Pon Pure Sales Playbook) takes the essential plan of a Sales and combines it with self and team practicality. In alternative words, PPSPB stores all of the important information creating our company productive that, within the past, solely existed in our employee's heads. The proprietary tools and templates within the Playbook function the muse to assist us devolve on by adding the simplest practices of our prime performers.

Sales playbook is a suite of go- to resource, tailor- made sales tools with collection of information, knowledge, tools, activities need to succeed, and that characterizes the roles and responsibilities of a sales team, converting theory in to practice. And is mapped to an organization's sales process with a purpose of outlining **WHAT** you sell, **WHO** you sell to, and **HOW** you sell it. When done right, a sales playbook will flip a scattered sales force streamlined, with easy-to-use tools and clearly-outlined steps for how to approach a new prospect and how to retain existing customers, allowing for a consistent approach that doesn't confuse or turn off a prospect/ customer.



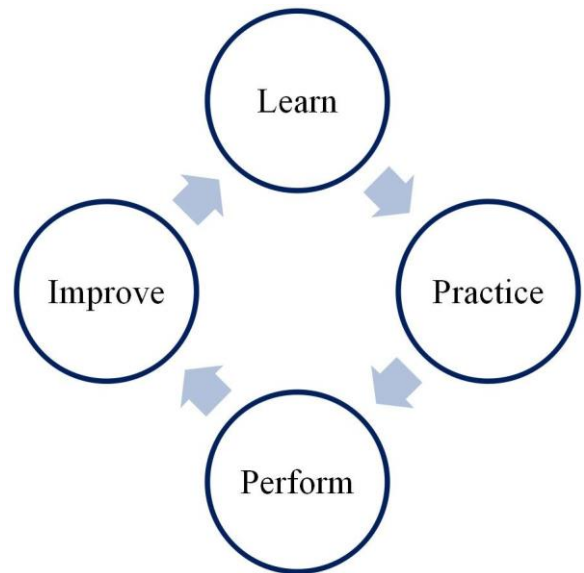
PURPOSE OF A SALES PLAYBOOK

Sales Playbook is a living document that enables to discover ways to address the vulnerabilities of our company. With this practical sales playbook, we can leverage strengths, differentiate offers, prove business value, and ultimately improve the win/loss ratio.

It accomplishes the following:

- a. Outlays clear objectives
- b. Identifies metrics for measurement
- c. Create uniformity by providing a common framework and approach for closing sales
- d. Promote collective growth
- e. Drive revenue
- f. Prevent miscommunication
- g. To know key industry verticals
- h. To create repeatable success

Also, provides clarity on Company process, Do's and Don'ts that a Sales executive must concentrate on.



Inactive customers: Are the customers who have not done business with PPC for 3 Journey Circles (JC).

By the way, Journey Circles are 12 Months in a year split into 13 JCs with 28 days each.

Active Customers: Are the customers who have bought at least once/ more in 3 JCs.

Few guidelines to active Inactive to Active customers are as follows:

- a. First, identify inactive customers in your Market Circle
 - b. Analyze Inactive customer's buying pattern from previous data
 - c. Perform back work on getting the reasons on customers turned Inactive. This can be done either by asking the Branch Manager, ex- employee if possible, or may be, to the customer themselves, on direct visit but in a polite manner. Combination of all will give better clarity on the problem/ reasons
 - d. Re- target Inactive customers
2. Embrace technology
 3. Customization of products
 4. Increase the volume what we sell so as to reduce cost/ kg
 5. Collect payments as per the due date
 6. Know your visit objectives

On practicing these tips, our Logistic and Ware House costs (Operational Cost) reduces.

SALES PROCESS CYCLE AT PPC

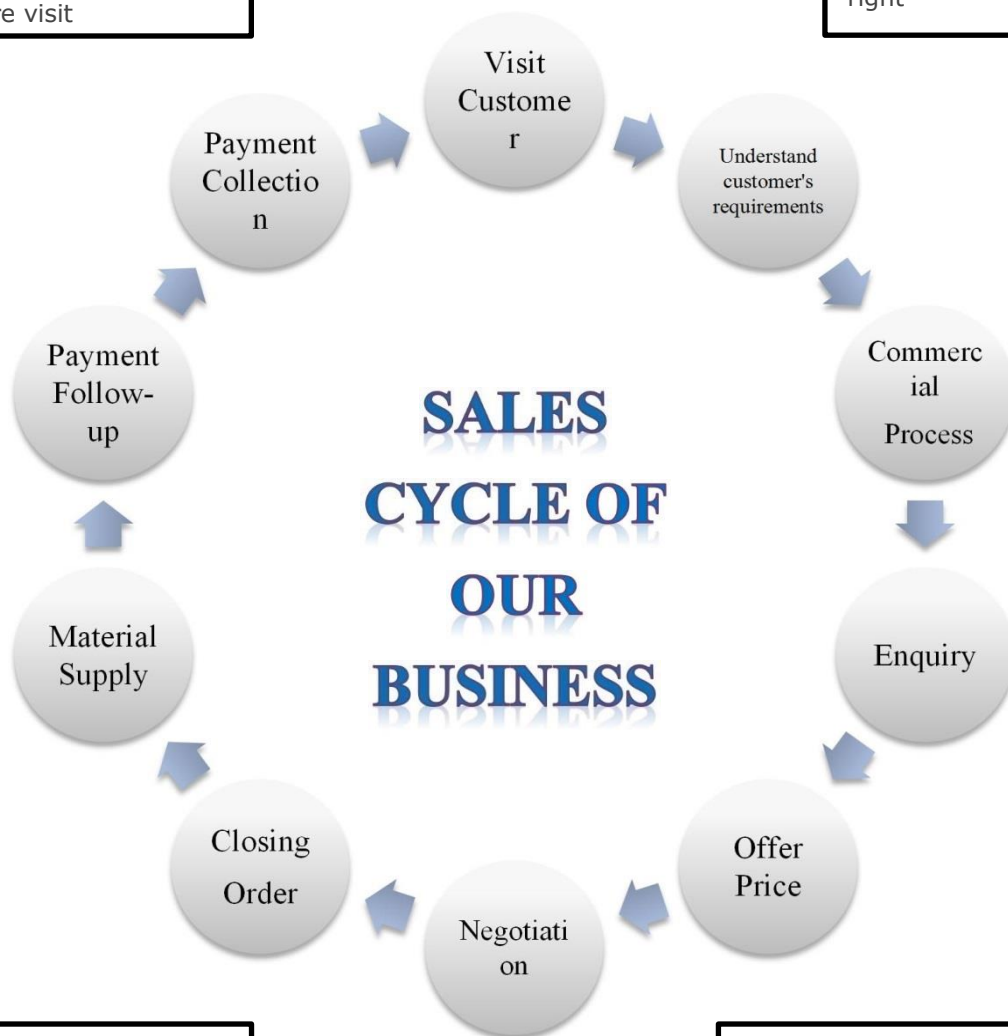
Sales Process Cycle, is framed when the pieces of the B2B sales process fit perfectly into place. That is how you engage with more leads, close more deals, increase sales and boost your bottom line. And, once you get this right, it is a process that you can repeat over and over.

Tip 2: Exchange information, so as to get: New requirements

- a. Regular requirements
- b. Suggest some alternative From/to the customers

Tip 1: Pre- plan with previous Transaction before visit

Tip 3: Set Payment Terms right



Tip 5: Check for Credit limit And stock availability

Tip 4: Create a sense of urgency

Here, stage one- Customer Visit itself an important phase. As, business from

- a. Existing Customers is highly dependent on relationship we have with them
- b.** New customers, are analyzed with at initial transactional sales, so as to reduce **RISK**
- c. Inactive Customer (IAC), that falls in Asymmetric alignment on
 - i. Relationship
 - ii. Information

Note: 95% of our recurring/ regular business comes from Existing customers only.

SALES STANDARDS AT PPC

SALES CATEGORY

1. Repack
2. Bulk
3. Performance Chemicals

COLLECTION TARGET

Collection Target= 100 % of Overdue + 85% of Future Due – 240 days Outstanding Amount

Where,

Over Due = Payments that has crossed the due date, at **END of JC.**

Future Due = Payments that are going to fall in upcoming JC.

* We are not Considering Current JC Payment in collection Actual
(Example: After freezing JC-2 Target, We should not Take JC-2 Payment in Actual)

We not considering below payment in collection Actual.

* Advance, RTGS, Immediate Payments.

COLLECTION ON TIME (COT)

Collection on Time= Sum of payments collected on or before DUE DATE

It is then measured in terms of **Percentage (%)**, which equals (Collection on time/ Total amount to be collected).

But, how do you collect payment on/in due time?

1. Be Prepared before getting to the customer
2. Ensure the your need is discussed first
3. Confidence in speech must be present while you seek customer on collection
4. Explain how it will affect your growth / Personal growth
5. Whenever required use senior's assistance at office
6. DO NOT set tempted by orders, while you are in a collection call

Why it is necessary to collect payment appropriately?

1. Need money to **run business**
2. To maintain a **good relationship with customer's**, Principals, Service providers, Financial institutions
3. To **increase the overall image** of the company
4. To **upgrade the Credit rating** of the company
5. To **reduce overdue interest**
6. To reduce **Average Overdue Delay Days (AODD)** and **Average Collection Days (ACD)**

What are all the criteria to be checked for collection on time?

1. Invoice submitted to right person
2. PDC collection status
3. GRN Entry
4. Customer's portal on Invoice status (if any)
5. To perform effective follow up for setting payment as per credit offered to the customers

There are some **DON'Ts** that back fire our relation with customers when done!!

MARKET REALIZATION (MR)

At PPC, we work on market price while quoting price to customers. Price quote has to take the consideration stated below:

“Market realization is a process of selling above the market price on a given day at a given time, considering all the costs factored to arrive at the realized value”

1. Quantity we supply to the customer
2. Credit days we offer to the customer
3. Delay days of the customer if any
4. Product demand/ availability
5. Market price on the day/ time we quote
6. Based on past business transactions
7. Offer validity
8. Type of material quoted
9. Inward / Outward freight
10. Packing cost + Tolerance (Drums/ Carboys -New or old/once used or same color)
11. Storage cost (21days of holding)
12. Interest cost (21% Per Annum)
13. Interest on overdue delay days (21% Per Annum)

Remember, only by performing value addition, we can get better market realization.

Who is Responsible for MR?

Entire Sales Team -- Sales Executive, BM and RM

Ways for increasing MR %

- Define Our Value.
- Inform the Up Trend.
- To Know Customer Interesting Area or Field

- To make regular follow up
- Sit with Customer Place and finalize the Price.
- Honor Commitment.
- To Satisfy Customer Ego
- To take advantage of having of your relationship with the customer
- Any deviations or unhappy customers to meet them in Personal to explain properly
- Urgent Delivery based on customer immediate requirement.
- Non availability of material in the market
- Non regular or Opportunity Customer to Change Premium and explain that you are doing support to him.
- Go to the Extra Mile.
- Safety, quality related service to boost our relationship.
- Quantity is less and want to delivered, Milk it.
- Customized Volume (Small Pack)
- 365 days of Material available
- Excellent relation
- Explore Niche application of the product
- Collecting the payment on Due Date

Define Our Value

Help your customers understand why your prices are higher. If you know how competitors are undercutting prices, and you feel the competitors' lower cost equates to poorer quality or service or quantity , explain this difference. Explain your value to the customer.

SALES EXECUTIVE ASSESSMENT

KRA OF SALES EXECUTIVE (Repack + Bulk + Performance Chemicals Business)

The following are the key result areas of sales executive. Based on the achieve KRA sales executive performance will be measured.

S.No	Focus Area	Weightage	Target Area	Specific Target Area	UOM	Measure	Weightage
1	Increased Revenue by Achieving the Target Tonnage and value	44	*Repack Sales	Repack business - annual volume	MT	Growth Basis	20
			Performance Chemicals	PC Business - annual volume	Rs - in lakhs	T v A	14
			Bulk Sales	Bulk Business - annual volume	MT	T v A	10
2	Net MR	30	Focus on High Gross Margin Products & Customers	Market Realisation - annual value	Rs.In lakhs	T v A	30
	Others	10	*Customer Billing (CB)	Customer Billing (Avg Billing in Every JC)	No.of Customer Billed	Growth Basis	10
	Increased Collection Performance	16	Collection on time (COT%)	COT % (Payment Collected on or Before Due Date)	%	T v A	6
			Collection target (CT)	CT=(OD)+(85% OF FD)-(240 DAYS O/S) : (Min 85 % acheive collection target)	Rs.In lakhs	T v A	10
	BR : Total		100				

SALES EXECUTIVE INVOLVEMENT ASSESSMENT

Every JC, BM needs to collect Sales Executive involvement on discussion.

This would be done by General Manager.

SE Involvement %	Ranking Weightage
Is 100%	No Deduction
For Example : BM is Handling 20% business in Particular MC Allocated to a Sales SE, Then his active involvement is 80%	20% of the Total weightage got by SE will be calculated for Ranking Process

STANDARD TERMS FOR SALES EXECUTIVE CONFIRMATION

Customer Base: (Avg. billing for last 3 JC's + 12%)

1. NCA (New Customer Addition): 5 NOS.
2. Target vs Actual (Repack): Minimum 65 %

For Example:

Let us assume a sales executive joined in JC 4.

Average of pervious 3 JC's number of customer billed - JC 1, JC 2 & JC 3 = X number of customer.

He have to achieve X + 12% in JC 8, JC 09 & JC 10.

STANDARD TERMS FOR SALES EXECUTIVE CONFIRMATION

1. 60 New Leads to enter in CRM.
2. 20 Leads has to convert
3. Need to Score Above 80% in all Internal Trainings Exams
4. has to identify 100MT Potential

If Any Inactive customers allocated to this MC, Then keep 30% for overall conversion (Record while allocating to respective executive)

Note: SE Need to achieve above figures within 6 JC's to get confirm.

What are the things to be carried on Bag?

1. Company Brochure
2. Diary / Note Pad
3. Pen
4. Visiting Card
5. TAB
6. Hand Sanitizer
7. Mask
8. Cloth

SALES EXECUTIVE BOOK

Executives that use a structured sales process and know own performance, normally outperform. That's the reason PPC has provided you with a cake on hand, namely Sales Executive Book (SEB), to track and have a better clarity on the Market circle you handle. One Sales Executive Book is handled by one Market Circle, for the entire Fiscal Year.

Structure of SEB:

Entries done by Executive

1. Goals

- a. Yearly target: Bulk, Repack(in, Metric Tons) and Specialty(in, Value)
- b. Company, Branch, Market Circle Target

This helps to know your contribution for Company's goal for the Fiscal Year.

2. Checklist

- a. On Potential vs Target, Target vs Actual, Process test, BM interaction, Presentation on learning topics
- b. Frequency: Week wise, JC wise

3. Market circle- KRA (Key Result Area), the metrics of your performance is as per this sheet

4. Last year versus present year's performance

- a. Yearly target: Bulk, Repack(in, Metric Tons) and Specialty(in, Value)
- b. JC wise Actual: Bulk, Repack(in, Metric Tons) and Specialty(in, Value)

5. Presentation (PPT)

- a. Topics presented
- b. Branch Manager feedback on the same

6. Weekly Customer Visit Plan

- a. Week wise, JC wise number of customers visited
- b. Actual visits measured against the target on customer visit count (in, %)

7. Volume

- a. JC wise Actual: Bulk, Repack(in, Metric Tons) and Specialty(in, Value)
- b. Actual volume measured against the target volume (in, %)

8. Number of customer billing (NCB)

- a. JC wise Actual: Bulk, Repack and Specialty (in, Nos.)
- b. Actual customers billed measured against the target given on customer billing (in, %)

9. New Customer Addition (NCA)

- a. JC wise Actual: Bulk, Repack and Specialty (in, Nos.)
- b. Actual customers billed measured against the target given on customer billing (in, %)

10. New Product Development (NPD)

- a. Product names
- c. Yearly target: Bulk, Repack(in, Metric Tons) and Specialty(in, Value)
- d. JC wise Actual: Bulk, Repack(in, Metric Tons) and Specialty(in, Value)

11. Customers Billed as per NPD products

- i. Yearly target: Bulk, Repack and Specialty (in, Nos.)
- ii. JC wise Actual: Bulk, Repack and Specialty (in, Nos.)

12. Market Realization

- a. JC wise Actual: Bulk, Repack and Specialty (in, Lakhs)
- b. Actual amount (Lakhs) measured against the target amount (Lakhs) (in, %)

13. Collection

- a. Overall: Actual amount (Lakhs) measured against the target amount (Lakhs) (in, %)

14. Collection On Time (COT)

- a. Overall: Actual measured against the target (in, Lakhs)

15. Potential versus Target**16. Target versus Actual****17. Lead Management System (LMS)**

- a. JC wise, customer count as per LMS stage updates
- b. Total lead closure JC wise
- c. Summary on Customer count as per the category mentioned
- d. Score card updates

18. Diamond Presentation**19. Test Score Entry JC wise****20. Visit Report**

- a. Single Visits
- b. Joint Visits with Managers
- c. JC wise

21. Sales Executive Support Sheet

- a. Query to be entered along with date of request

Entries done by Branch Manager**22. Development Plan Team Member**

- a. Areas of focus for Executive/ Market circle in charge, with respect to skill, knowledge and attribute
- b. Accordingly, Development plans

23. Coaching Worksheet

24. Coaching sheet customized as per Executive ability to do business

- a. Beginner
- b. Novice
- c. Intermediate- Advance
- d. Master

25. Branch Manager Review Sheet with Executives

- a. Week wise comments
 - i. Sales Volume
 - ii. Collection
 - iii. Customer Base
 - iv. New Customer Addition
 - v. New Product Development
 - vi. Market Realization
 - vii. Development

26. Sales Executive Support Sheet

- a. Solution to be provided on written for executive's query date of solution

CUSTOMER CREDIT ASSESSMENT

Trade Credit is an important lifeline of running a successful business. When you allow credit to your customer or have some obligations from your suppliers and vendors, it is important to know if they are capable to fulfilling their part as per the agreed credit terms.

So, it is hard to ignore the role of trade credit and its importance for business.

Otherwise, the energy and investment that you employ to develop the business relationship may be lost and you could lose even more if your bills are not paid.

Credit Assessment on customers, takes into account a range of information related to the buyer, its environment and commercial stakes. This analysis leads to a specific strategy with each customer and will have some effects on trade negotiations and commercial terms.

So how Credit worthiness of a customer can be assessed?

Here are some tips to improve your assessment skill:

Factors considered on Credit Assessment for Prospective Customers:

1. Ownership
2. Financial Status
3. Product and Industry
4. Trade References
5. Background of Owners
6. Office Atmosphere
7. Growth Strategy
8. Internal Information

Background of Promoters:

1. Educational qualification
2. Experience before the current venture
3. Reason for leaving the previous venture if any
4. Culture/ Attitude of the promoters of the business
5. The personal financial stability of the promoters
6. Image of promoters among the public
7. Any Political Back ground
8. Any Other Activities they are involved

Banker & other information

1. Know the Bankers with which the company operates.
2. Reliable and worthy Successor or heir to the business.
3. Legal heir education and interests
4. Balance Sheet
5. Industry ref.
6. Knowledge about the Fixed Assets of the company [No. of Offices (Own/rented), warehouses etc.]

Office Atmosphere

1. Cleanliness and orderliness in the office.
2. Front office atmosphere.
3. Office building- Infrastructure.
4. Type and purpose of the Visitors.

Products and Industry

1. Major Products manufactured.
2. Place of their markets or Distribution Pattern.
3. Payment terms.
4. Competitors.
5. Future market condition.
6. Details of raw materials procured.

Growth Strategy

1. Expansion
2. Diversification to other business.
3. Financial resource for the expansion/diversification.
4. Acquisition of business/properties.
5. Foreign collaboration.

Internal – Information

1. Employee Satisfaction.
2. Longevity of employee.
3. Safety Procedures followed in the company.
4. Current attrition rate in the company.
5. Co-operation between the departments.
6. Learn about the management practices.
7. Other relevant information.

YOU CAN PLAN AND PRIORITIZE TO REDUCE STRESS AT WORK!!!!!!!

Activities you need to set time for at work:

Activities	Daily	Weekly	JC wise	But When?
Ageing Report Check				
Customer visit report				
Expense claim company Policy				
Lead Management System (LMS)				
Overdue/ Outstanding				Week 1, 2,3,4 of every JC
Customer Credit Limit Hold Check				As Credit limit of customers get hold on every Monday of the week, check on every Saturday of previous week
Pending Order Report Check				
Performance chemical key account Entries				Week 1- Saturday of every JC
PJP to HO				Every Saturday
Potential vs. Target				Week 3- Saturday of every JC
SEB entries				Week 1- Saturday of every JC
Target vs. Actual				Week 1, 2,3,4 of every JC

HPA Self-Assessment Checklist:

Key Area	My Sales HPA (for SEs)	An important HPA	I am performing well	I am ok at this	I need to learn and improve
Sales Plan	Potential vs Target				
	Target vs Actual				
	Development plan- JC wise (A4 sheet markings)				
Preparation	Pre- visit plan				
	PJP				
Prospecting	Target List Planning				
	Referrals from existing Customer				
Presenting	Objection Management				
	Samples to customers				
	Cross & Up selling				
	Selling Value/ Price Strategy				
	Problem Solving/ Creativity				
	Managing Customer Expectations				
Closings	Ask for business				
	Price Negotiations				
Pipeline Managem ent	CRM reporting				
	Follow touch system to crack business				
Training	Continuous learning with training programs				
	Role practicing				

LEAD MANAGEMENT SYSTEM

Let's say, your hobby is to fish. With a fishing stick, it is manageable or may be sufficient enough to get as per your personal requirement. What if you're a fisherman by profession, you would grasp that excluding the enjoyment of fishing, getting many fishes as per the requirement is impossible using a fishing stick.



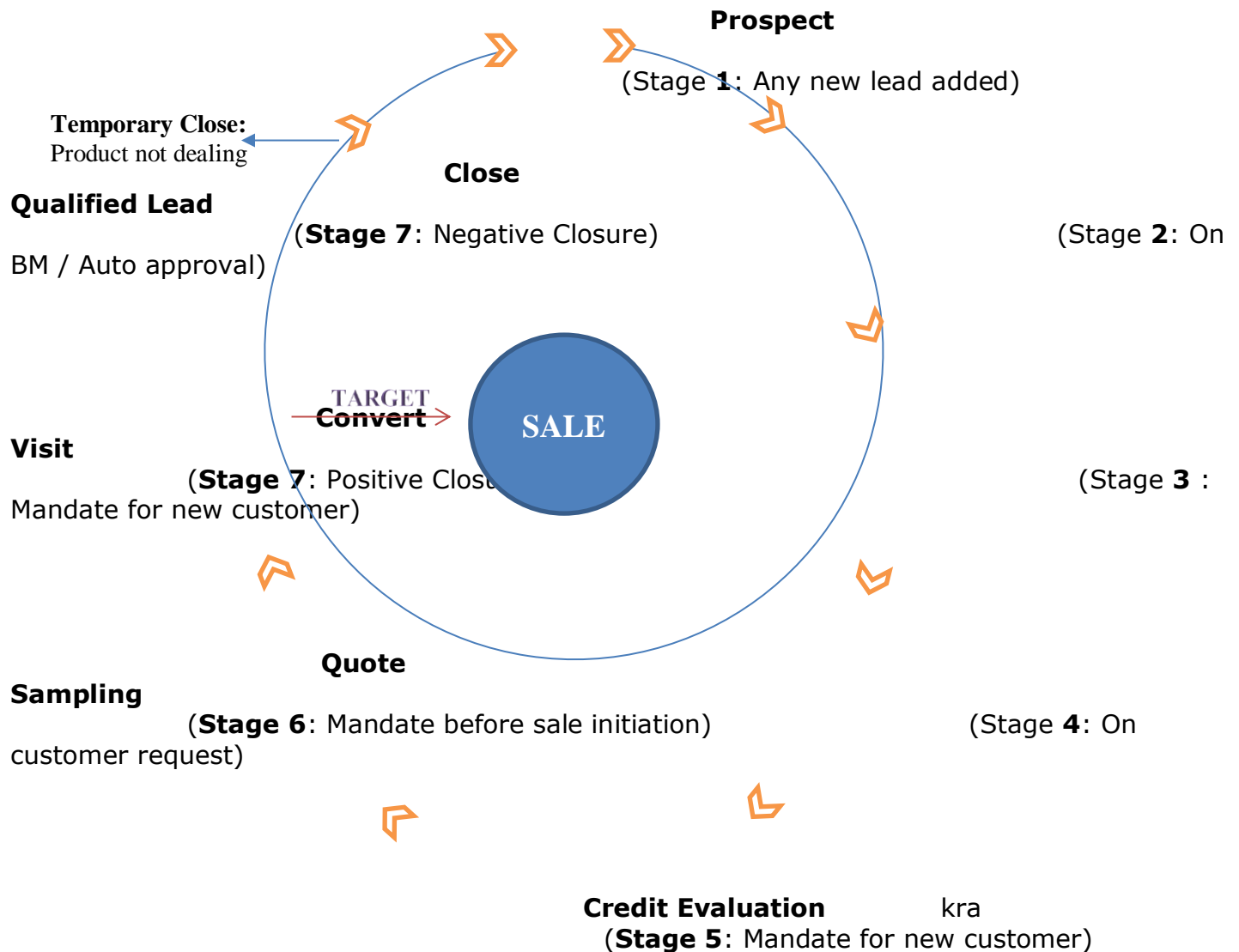
That is somewhat almost like the matter of most growing businesses, if you require/ receive humpty number inquiries or leads than the capacity to handle as an individual and proper system, there comes the problem to manage all their leads properly and equally and that's once their leads begin to scatter like these babies.

“Lead management is that the method of managing leads, perpetually and equally.”

Leads consist of potential customers with interest in our products, but yet to release order. You have got to convert these so called “interested but yet to do business”, into loyal customers. Meanwhile to execute it right, you have to manage sales leads in an organized manner.

That is when **LEAD MANAGEMENT SYSTEM (LMS)**, comes into drama.

At PPC, we identify, qualify and nurture leads in **stages of 8 numbers**, as mentioned below:



So, what sorts of activities are to be performed at each of these LMS

stages? Stage 1: Prospect

All leads created by executives by default will be in this status.

Stage 2: Qualified Lead

Leads once approved by the respective BM/PM/Division Head, it will be auto moved to this status.

Stage 3: Visit

Moving to this status will be validated against your CVR Entry.

Note: CVR date match should happen at this stage.

Stage 4: Credit Evaluation

Moving to this status will make sure that the customer master creation is done / already exists.

Stage 5: Sampling/ Trails

Moving to this status will require a Sample entry in your CVR.

Stage 6: Quote

Moving to this status will require a valid Quotation.

Note: Quote Id is required for reference at this stage.

Stage 7: Converted (Positive Closure)

Lead will be automatically moved to this status, once confirmed and dispatch is done.

Stage 7: Close (Negative Closure)

Leads are to be closed with valid reasons from the drop down.

RM's will close the leads for the below mentioned List of values are:

(i) If the company is closed.

(ii) If the Product is discontinued.

(iii) Traders Lead

LMS Guidelines:

1. While creating leads, select the correct "**Source**" of lead. Do not select random sources.
2. For **GC leads**, unit of measurement is in "**Metric Tons**".
3. For **PC leads**, unit of measurement is in "**Lacs**".
4. For **NPD leads**, unit of measurement is in "**Liters**".
5. Potential for a lead must be per Annum (**Potential per Annum**).
6. **Executive** receives an **email alert on creation of lead**.
7. **Branch Manager** receives an email alert on creation of a lead for **approval** from "Prospect" stage to "Qualified Lead".
8. Branch Manager receives an email alert, if a created lead is sent to **Product Manager** for **approval** on their respective assigned products, to approve from "Prospect" to "Qualified Lead" Stage.
9. In case, Branch Manager/ Product Manager do not approve leads, it gets **Auto- Approved after 2 days** from the date of lead creation.
10. Lead creation date must be prior to Visit date. If not the **stage will not change to 'Visit' status automatically**.
11. In case Visit date is prior to lead creation date, automatic stage change to "Visit" will not happen. Instead, the executive must **manually change the lead status** to "Visit" stage in LMS, **by matching with CVR entered**.
12. Automated conversion to "Visit" stage will happen only if the created **lead is in "Qualified Lead" stage** and then CVR entry is entered.
13. **One quote for one lead**. Do not create multiple quotes for a single lead. **If not, stage conversion will not happen automatic**, as lead takes in to consideration only the first quote created.

14. In case multiple quotes have been created, **close the unwanted quotes** those are not dispatched/ not used, **with the help of Branch Coordinator**. Even then automatic stage change will not happen in LMS, instead executive should **match manually the correct quote Id**, to change to "Quote" stage.
15. If the quote has been matched manually in LMS after dispatch, **the stage will change to "Converted"**.
16. **Potential for any lead can be changed/ corrected** before moving it to "Quote" Stage.
17. Lead **cannot** be created for **Existing customer, already billed product**.
18. Lead **cannot** be again created, if a **lead for same customer and same product is open**.

Potential vs Target

- Every JC 3rd Week Monday CRM Target Screen will be enabled.
- Based on that SE's need to enter their target against potential for all BP customers.
- After Sales Executive target entry Submission, Branch Manager Need to cross check their target entry and Need to submit.
- Regional Manager has to give approval for Repack Products and Product manager has to give approval for Bulk products.
- Cutoff Time to Finish target entry was JC 3rd week Saturday.
- Below is the List of Values for Potential Vs target, Incase if target is given less than 80% of Monthly potential.

S.No	Sales Executive Screen Reason	S.No	Sales Executive Screen Reason
1	No Requirement	16	Do not have license
2	Payment not collected	17	Relationship to be built - Ego issues
3	payment long delay	18	Relationship to be built - Old issues
4	Credit limit required	19	Relationship to be built - Quality issues
5	credit limit full	20	Relationship to be built - Services issues
6	Not credit worthy	21	Competitive Share
7	Trader	22	Food grade Certificate required
8	Company closed permanently	23	Production slow down
9	Distilled material/ without Bill	24	Target taken in sister company
10	Price issues	25	Directly buying from manufacture
11	Converted in to Tanker	26	Direct Import
12	Stock Out	27	Requirement will come once in 2 Months
13	Seasonal Product	28	Requirement will come once in 3 Months
14	Campaign	29	Product covered for this JC
15	Follow up required	30	Converted Order to Specialty

How do we measure potential of a customer

- Exploration Process (Probing) -- For New Customer.

- Potential identification can be done by:
 1. Industry wise survey
 2. Area Wise Survey
 3. Tele- Calling
 4. Googling

By meeting them and exploring what products they buy and their Quantities.

We record their requirement (Monthly) in tonnage /Barrels/Kgs/Lit in our CVR
Then we enter the identified potential in our Lead Management System (LMS) in yearly Tonnage only.

What is Potential of a customer?

- It is a measure of a customer's total consumption of products (it might be single or many products).
- Basically here we talk about his total buying capacity of raw materials.

Pre-requisite - Potential Vs Target

- Potential Vs Target should be entered from third week in our CRM.
- Against the potential we have to enter the targets.
- In Potential sheet, we will have customer wise products and we have to enter target for each and every customer product wise.
- Before entering targets sales executives should have discussion with their BM's from his superior like, on what industry will do better, products in demand, focus products, industry focus, etc. this will ensure the sales executives to put realistic against the measured potentials.

Tool to do better Potential Vs Target Calculation

Segmentation of the review

LMS	KEY CUSTOMERS --- 80:20 RILE
JC OPPORTUNITY	OVERALL CIRCLE

1. LMS – Future business for the company-try to take maximum. New customer target.
2. Key Accounts Customers – These are customers in each circle will do 80% of the business, ensure we take full target. So that we can shield competition.
3. JC Opportunity – Sales executives should be vigilant in identifying such opportunities customer for billing, which will help him to serve the customer as well as help him to achieve his target.

Example:

- Camping
- Expected Out of way orders
- Change in Product
- New product
- Shipment delay

4. Over all Circle – In this, Sales executives has a revisit his targets, check any gaps he has left, any opportunities missed. So that, he is confident of doing the target.

Target Vs Actual

1. Once the JC is over, use the same tool to understand, when you have done well and where you could have done better.

Check the reasons such as:

- Customer Not Interested
 - Frequent Changes of DMU
 - Periodic requirement
 - Seasonal requirement
 - Price
 - Quality issue
 - Relationship
 - Service issue / Logistics issue (on time delivery, cost of transportation)
 - Lack of follow up Lack of follow up
 - No requirements
 - Covered for 3 JCs
 - Payment (Credit limit, Payment term, Delay in payment)
 - Not met customer Expectations
 - Trader
 - Billed in Sister Company
 - Campaign Requirement
 - Drum Stock Unavailable
 - Pending Order
 - Product Make
 - Product Out of Stock
- for not doing with customers and address the same. If required take the support of the branch managers.

2. Try to reduce the reasons for not doing in the coming JC's.

INACTIVE CUSTOMERS

Inactive Customer Definition:

Inactive customers are customers those who have not done business with us for the last 3 JCs.

For example: If a customer has been billed in JC 01 but not billed in JC 02, 03, 04, then the customer becomes Inactive in JC 05.

Why customers become Inactive?

1. Payment issues
2. Service issues
3. Quality
4. Relationship related, such Ego, Attitude, lack of understanding and so on
5. If we fail to meet customer's expectation
6. Lack of follow up

Why we need to focus on IAC?

1. To retain customer base/ density
2. To increase our existing volume and profit
3. To increase average number of customer billing
4. Reduce risk
5. To minimize our operational cost
6. To achieve 50-50 customer billing
7. To save time and energy
8. To increase our MR
9. Cost of reactivating IAC is much lower than acquiring new customers



How to convert IAC to active?

1. After identifying the IAC, do check internally first to identify the reason for customer becoming active
2. Check whether the reason/ mistake is really from our side or from customer side
3. Use previous activity and purchase history to drive interactions
4. Prepare and plan for a direct visit with the customer. If the customer is following appointment system, then set an appointment and visit them.
5. Use all components of LAER. Listen to customer's query or reason why they are not buying from us. Acknowledge or apologize to them for the mistake. Explore in-depth the issue to get better clarity to know what actually went wrong. Respond to the customer based on the concern. And do all this in a polite manner. Do not set yourself in an argument with the customer.
6. Find out what needs to be nourished. And give a proper solution/ alternative for the customer.
7. Plan to revisit the customer with your superior (Joint visit) if necessary
8. Convince the customer to restart the business with us!
9. Take a lifetime value approach, that the customer must not go away from us

PRE- JOURNEY PLAN

What is Pre- Journey Plan?

Pre- Journey Plan is prepared by executives for upcoming week on visits.

AIM: To streamline the quality of entering PJP in order to achieve the actual in person visits to increase efficiency about 10 times.

Why to enter PJP?

1. This gives 100% **CONFIDENCE** to **SELF** and to **CUSTOMERS**, since you have visited with Prepare and do business with customers preparation
2. Frequent **PHONE CALLS** to **COORDINATOR** and **BM** gets reduced
3. Will get clarity on customers on what to talk or what information is to be given to customers

When to enter PJP?

PJP must be entered and submitted by the sales executive/ branch managers from Monday to Friday that is on or before every Saturday, for the upcoming week. If not entered PJP CRM will get locked.

Minimum visit: Per day 6 customers to visit by the SE and BM can visit 11per week.

PJP Adherence: 70% of physical visit must be happened against the PJP.

• PJP LOVs:

1. Collection
2. Confirmation of Balance (COB)
3. End User Certification (EUC) collection
4. Joint visit with Branch Manager
5. Joint visit with Product Manager
6. Net Promoter Score Survey
7. Relationship
8. Sales
- 9.CCV
10. Fixed Appointment
- 11.IAC

How to plan PJP:

1. CCV customers – focus on not visited customers
2. IAC
3. To collect payment
4. To maintain relationship with the customer
5. Other need based – any issues

- PJP is measured only on CVR Entries.

- Advantages of planning quality PJP:

1. Complete CCV project within twice in a year (JC 01 – JC 07) and (JC08- JC 13).
2. In person visit will increase.
3. Discuss with BM and take his inputs and freeze the plan.
4. If planned leave no need to enter PJP.

What happens if PJP is not submitted by executives?

If not entered PJP within the timeline mentioned, both **CRM menus** and **TAB- PSALES** App gets locked. Once the executives fill in details, locked system will be unlocked.

But for the MCs below are of exceptional, as they either belongs to trader or BM handled account.

And this **locking is only for executives** and while the approval goes to BM, the BM must have the option to approve with in Sunday, if not the PJP entered by executives gets auto- approved. So Monday the windows must be closed and ready to print the reports.

On What basis PJP needed to be prepared?

1. Which Customer to Visit – Based on their Requirements for selling
2. To spend **QUALITY TIME** with customer for a purpose, to avoid visiting un-necessary customers
3. To make use of the available time **EFFECTIVELY** and **EFFICIENTLY**, in order to achieve the target
4. To know the **POTENTIAL** of the customers
5. To get **MULTI- LEVEL CONTACTS**
6. To Visit along with BM
7. To build **RELATIONSHIP**
8. To do follow up for **PAYMENT**
9. To collect payment
10. To collect **PDC**
11. To resolve STUCK **PAYMENT**
12. To collect **EUC- END USER CERTIFICATE**
13. To collect **COB- CONFIRMATION OF BALANCE**
14. To plan **JOINT VISIT** with BM for additional business
15. To perform **CREDIT ASSESSMENT**
16. To take BM for **CREDIT LIMIT ENHANCEMENT**
17. To plan visit with Product Manager

How to enter PJP?

1. There is a section in CRM as "PJP", where executives must enter visit plan.
2. Dates for upcoming week will be given; executives must select respective visit dates

3. And then the customer's names can be selected based on category of customers, such as:
4. Alphabetical Order (A-Z Order)
5. Last 2 JCs not visited Customers
6. Potential Customers (Customers with Maximum Potential will be displayed at top)
7. LMS Customers
8. After which, the purpose of visit on selection from given List of Values must be selected.
9. Save
10. Submit
11. Goes for BM approval

Executives can download the plan, which has all details of customers that will be auto generated.

Executives must take printout of same for reference and preparation. The only field executive will fill in manually is the Market price of respective products, planned for visit, rest all automated.

ENQUIRY TO QUOTE (E2Q)

Objective of **Enquiry to quote (E2Q) conversion** is to respond to all the enquiries from customers **100%** by using PSALES APP.

Benefits of early and 100% conversion of enquiries to quote:

1. Team member's **response** towards enquiries will be excel and quick
2. Response time to enquiry can be **measured** and can check for adherence to **TAT (Quote within 3Hr)**
3. This **reduces follow up** by customers for getting quotation from executives and can become **NIL**
4. Productivity of executives increases
5. Duplication of work on sending manual quotes can be avoided

Process of sending Quote a Customer enquiry:

For the customer those who send enquiry mail, must also be responded by executives via **PSALES APP**

Existing Customer, Existing Product

The enquiry directly goes to the respective Sales Executive (SE). In this case there is no approval for enquiry from BM/ PM.

The SE can select either:

1. Quote
2. Not Able to Quote

Quote:

On clicking "Quote" option by SE, the page re- directs to Quotation screen (Push notification is there at present).

Once the SE gives the quote it goes for BM approval.

If BM approves, it goes to the customer.

Not Able to Quote:

On clicking "Cannot Quote" option by SE, it shows 2 other options as:

a. **Quote Later:** Here the SE can select timeline by date (future dates alone), along with comments/ notes and send for BM approval.

If the BM approves, it goes to the customer. (How we can follow- up on this? Can we set a reminder mail to the concerned executive and BM?)

b. **Reject Enquiry:** Here the SE must select options from the drop down to reject the enquiry along with comments/ notes and send for BM approval.

The reasons are:

- i. Product Out of Stock
 - ii. Product Not Dealt
 - iii. License not Available
 - iv. Others (Generic mail stating that we cannot serve you at present)
- } (Already developed content)

On approval by BM, a mail with selected reason will be sent to the customer.

Existing Customer, New Product (Product group that we handle)

The enquiry goes to the SE and the same process as "Existing Customer, Existing Product" for raising quotation by the SE will be followed.

And simultaneously a lead gets auto- generated and goes for BM/ PM approval. If not approved by BM/ PM within 2 days, it gets auto- approved and the process continues as per LMS.

Lead and Quote approval sent for BM/ PM are separated and are not interconnected in approval process.

New Customer- Existing/ New Product

In these cases, the enquiry goes to the SS team/ Mr. Sathyamoorthy, and the enquiry is created along with a temporary customer creation by clicking "Add customer".

And the MC is assigned by Mr. Sathyamoorthy, on discussion with the respective Collector's Branch Manager. Meanwhile, a lead gets auto- generated and goes for BM/ PM approval. If not approved by BM/ PM within 2 days (As the MCs are already assigned), it gets auto- approved.

What we need to add is as mentioned below:

Here, **quote cannot be sent until Master Creation is done for the new customer**, mapping Temporary Customer and Lead number that are to be made mandatory. Also, quote is sent by SE and if the BM approves the same, it goes to the customer. BM can also create quotation.

If the enquiry is rejected by BM for the below mentioned reasons with comments, mail is sent to customers:

- i. Product Out of Stock
 - ii. Product Not Dealt
 - iii. License not Available
 - iv. Others (Generic mail stating that we cannot serve you at present)
- } (Already developed content)

If the enquiry is approved by the BM, there can be a generic mail sent to customer that we will give quote shortly or a tentative date selection by BM for raising quote by SE and communicate the same to customer.

Note:

1. The lead/ quote approval goes to either BM/ PM, based on the product/ sales category assigned in system. For product with no PMs, it goes to CR sir for approval.
2. Only for enquiry rejection by SE, mail communication is done to customers.
3. Multiple quotes cannot be created if one quote for the same customer- product is live (existing system).
4. On creation of all enquiries a mail goes to the customer acknowledging their request along with the enquiry number.
5. For **new product addition and respective product payment term** for a customer, executives must send add it in PSALES APP and instead sending quote via separate mail for those products is **not advisable. And this addition of product and its payment term can be done by the executives themselves and not to send request to SS team.**

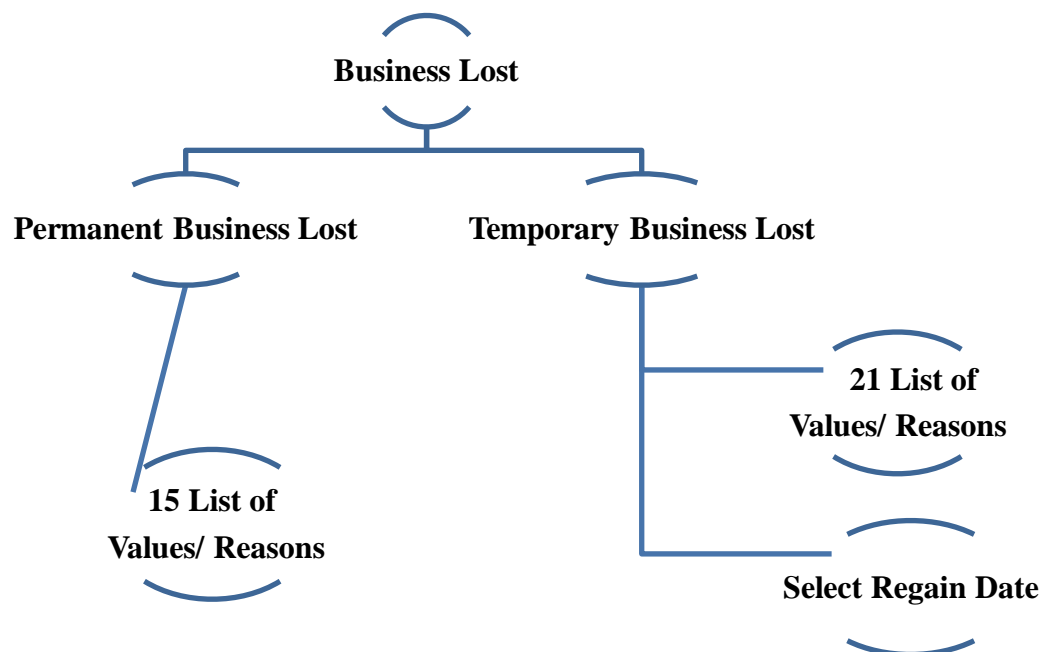
6. For some customers due to payment delay, executives **cannot** offer with **Open Credit**, instead for those customers the payment terms can be changed to **Advance Payment** and **can continue to offer products regularly**.
7. TAT for Enquiry to Quote is Below 2 hour, Need to respond customer before that.

BUSINESS LOST

It is said to be Business Lost, when you give **User Defined Target** for a JC but have not billed against those customers in the same JC and is with respect to products.

Why you have to do Business Lost Entries?

1. We perform analysis where we lose orders?
2. In which area we need to concentrate on?
3. What are the remedies/ alternatives to avoid such business lost?
4. To have a track on Average Regain Days as per the report
5. Which reason has maximum regain days?
6. Collector wise- MC Wise
7. Correct Soft information and so on



Permanent LOVs	Temporary LOVs
Customer's own product Process optimization No requirement/Replaced by competitor EB / OEM recommendation Misunderstanding /Miscommunication One time requirement Specific brand Contract price Product deleted Payment (Credit limit, Payment term, Delay in payment) Product changed Changed to tankers Company Closed Payment Stuck Legal Issues License	Customer Not Interested Frequent Changes of DMU Periodic requirement Seasonal requirement Price Quality issue Relationship Service issue / Logistics issue(on time delivery, cost of transportation) Lack of follow up No requirements Covered for 3 JCs Payment (Credit limit, Payment term, Delay in payment) Not met customer Expectations Trader Drum Stock Unavailable Billed in Sister Company Product Out of Stock Packing Campaign Requirement Make

Note: List of Values (LOVs) will be added/ updated as per the requirement of Sales Team on periodic discussion or on request.

CUSTOMER VISIT REPORT (CVR)

Purpose of entering CVR in TAB:

1. Record on discussion with customers for **future reference** (internal purpose), to know their **preferences/needs** and **requirement follow ups**.
2. To enhance **customer relationship** to protect and grow **customer base**
3. For **training** purpose to help BMs and other trainers
4. Enhances Branch Managers to **review**
5. For **quote**, CVR entry is mandatory
6. For **LMS stage change** to "Visit", CVR is mandatory

What to write in CVR?

1. **Potential identification** of products/ customers for which/ to whom we are not selling respectively
2. Details on collection and follow ups with customers:
 - a. **Payment,**
 - b. **PDC,**
 - c. **LC,**
 - d. **Bill Discounting,**
 - e. **EUC**
3. Details for **New Product Development** (NPD)
4. Observed **facilities at customer place**
5. **Financial update/information** of customers
6. **Disputes** with customers on relationship/ product/ service
7. **Competitor** information got on customer visit
8. **Market information/** Trader information
9. **Person of contact change** updates at customer place
10. Customer **business expansion** details- location/ units, production increase, work force, etc.
11. To improve **Performance Chemical business**, by making customer's discussion points available to the Technical team via CVR
12. Information such as business type, volume, turn over, etc., to **diversify customers** accordingly

CVR as per System:

1. **CVR entries** are based on **Customer** and **NOT based on Customer- Product wise**
2. **One CVR** entry for a Customer **a day**
3. Visit must be entered **next day before 11.59 PM.**

For Example:

Say the visit has to be entered for date: **28/07/2020.**

The visit entry provision will be closed at 11.59 PM of **29/07/2020.**

4. In case the **CVR entry could not be typed by the executive** within the stipulated time and is closed for entry, **the executive must get permission** from his/her respective BM to reopen the provision to type CVR for **valid reasons only.**
5. Enter CVR in menus
 - a. CVR Sales and Others
 - b. CVR Collection
6. Do not enter visit entries in "**CVR Action Items**". As Action items are only for reminders on work "to be completed" related to customers and **not for visit entries.**
7. "**Visit Type**" has **3** options, namely:
 - a. Single (**Default**)
 - b. Joint (To be changed)
 - c. Others (To be changed)
8. "**Visit Mode**" has **2** options, namely:
 - a. In Person- For direct visit to customer place (**Default**)
 - b. Telephonic- For phone call entries (To be changed)
 - c. Joint- If you are accompanied with Product Manager, Branch Manager, Quality Team, etc (To be changed)
9. Select **Product category** and **add products** of discussion on that particular visit with customer
10. If **CVR for a customer is entered after lead creation**, lead stage gets changed to "**Visit**" **automatically.**
11. In case, **CVR is entered before Lead creation date**, the executive must go to LMS and **change to "Visit" stage manually**, matching the CVR entered for that customer.

FREQUENCY OF VISIT

- Frequency of Visit (FOV), overall indicates the number of customers (Individual) in a circle visited by the sales executive in a given JC (Journey cycle).
- This metric allows you to assess the percentage of individual customers, whom the sales executives has visited in that particular JC
- Frequency of Visit helps us to measures the number of days that have passed since each customer's sales executive have visited last.
- This measure allows you to see the average amount of time between visits for your customer base in the market circle.
- This report helps us to understand, how many customers we are able to visit and how many customers we have not visited in that particular market circle. If we take this report for a quarter and analysis, we can understand that, how many customers in that market circle were not visited by the sales executive, these non-visited customers can be good value of wealth for an organization.
- This report will help the executive to give attention to all the customers in that circle.