

The Client is one of the major distributors for Pepsi.

### Scenario prior to ConfiWorkflow

The sales representatives and field agents were sending a paper report in printed format to the corporate office. The managers at the corporate had a brief look at a sample of the reports which were then archived for future reference, if any. Actual MIS and control was achieved through periodical meetings with the sales representatives and field agents. During such meeting, the volume of sales was used as metrics of performance while the intricacies and critical elements responsible for the sales were largely ignored.

### Areas of Concern

The main area of concern was the inadequate usage of the data submitted by the field agents both for the purpose of monitoring and control and also for analytical MIS. This was resulting in the following problems:

- + Lack of effective control on daily movement of Sales representatives and field agents
- + Skewed marketing effort
- + Inadequate market feedback
- + No information on stock positions of retailers and product movement
- + Delayed payment collection
- + Difficulty in fixing responsibilities owing to absence of systematic
- + communication mechanism between corporate office and agents.

### Solution Implemented

Our web based Sales Force and Workflow Automation system, ConfiWorkflow was deployed at Client's place. Each sales representative and field agent fills the daily report in a specific format by logging on to the website with a unique user name and password. All information relating to retailer visits, order bookings, payment collection, new retailer enlistment and market feedback on products are systematically captured. The Target setting module enables specification of and progress against targets on multiple parameters. Stock data of distributors is captured for gauging stock-in-trade and product movements. Retailer enlistment and feedback forms the basis of marketing strategy for different areas. Inbuilt web based emailing and chatting system enables efficient and economical communication. The net result has been more effective channel management, higher revenues and cost savings.

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