

The Client

A leading healthcare chain in India.

The Challenge

The staff used excel sheet to report their daily work from their office. This process had huge inefficiencies as most of the times, the management did not know if the staff had actually made the calls in the field and the time taken to consolidate the reports was too long. The final reports, prepared manually, lacked slicing and dicing the data for informed decision making.

The design of the technical framework and selection of correct metrics for the reporting dashboard was the most challenging aspect. Since the app had to be used by the sales executives who were not tech savvy, the design of the app was a critical factor too

The Approach

Innovantes held one-to-one meetings with the leadership and the sales team members. Random selection was done amongst the top, mid and lowest performers to understand their daily schedule and reporting mechanism.

Various metrics to be captured and included in the reports were studied and selected. The categories of reports were identified to be included in the dashboard- Sales to old and new customers, Average Revenue and Profit per Customer and Region, Outcome vs. Input, Compliance to the plan and deviations, Best performing areas and executives.

The Solution – A native app based reporting tool and customizable dashboard

Innovantes developed a native app based planning and reporting tool on Android and iOS with the following features:

- Planning- Sales Planning through the app
- Execution- Reporting of sales calls through the app using accurate background location capturing mechanism
- Real Time Alerts
- Reminders

Dashboard and Analysis:

- Reporting- An easy customizable DIY dashboard was prepared which included the region-wise or HQ wise drill-down. Real time, easy visualization of the metrics at various levels were included.
- Real-time Analysis- In-built real time analysis of the sales efforts and flagging of deviations. The management could see the YTD and MTD metrics at a click of the button.
- Mapping input and outcome: Mapping of input parameters with outcome and finding out areas where more efforts were required.

Access to the app and the dashboard was given on need-to-know basis to take care of data security.

The Impact- Improved ROI

- The adoption rate of the app went to 90% in the first 2 months due to user friendly design
- The management was able to track the activities and the ROI on their sales force.
- The management could track the activities of all users through log auditing.
- The ROI on sales spends gradually increased by 20%.

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