## A PROJECT REPORT

### ON

## "SALES FORCE EFFICEINCY: ANALYSIS AND RESTRUCTURING OF QUARTERLY PLANNING AID"

<u>SUBMITTED BY:</u>

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"Integrated BBA+MBA (Oil & Gas Management)"

<u>UNDER THE GUIDANCE OF:</u>

**Mr.ParitoshDawande**
**(HPCL)**

**UNIVERSITY OF PETROLEUM AND ENERGY STUDIES**

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# CERTIFICATE

This is to certify that Ms. **Disha Singh**, student of integrated BBA (Oil& Gas) VIIIth semester has prepared her summer training project under my supervision and guidance from 21$^{st}$ May 2013 to 19$^{th}$ July 2013. The work is original and has been done independently by the student.

I further confirm that Ms. **Disha Singh** bears a good moral character. Thus, our company certifies her work for completion of the project with the excellent results.


**Mr. Paritosh Dawande**

(HPCL)

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# EXECUTIVE SUMMARY

This project has been a great experience for me and at the same time it gave me enough scope to implement my analytical ability. Quarterly Planning Aid is basically a tool around which my project is revolved, is a self- optimization process for the sales and marketing officers.

This project gives an insight about the training processes and tools implemented by the company to increase the efficiency of the sales force and analyzing and restructuring of this tool to enhance the performance of sales and marketing officers. The project also consists of data and analysis, collected through telephonic interview and questionnaire.

QPA online tool is basically a self- improvement technique and it was designed for sales officer and marketing officer. Through this tool sales/marketing officer are able to Plan their schedule timely so that they can focus on the core activities. This tool helps sales/marketing officer to perform to their highest level of efficiency.

Both primary and secondary data was collected and descriptive research was carried out. Sampling was conducted on hundred sales and marketing officers of HPCL of different with the help of random sampling technique.In this research primary data has been collected though method of telephonic interview and questionnaire. This method has certain advantages as it is versatile and almost every problem can be approached from interview stand point. It is faster and cheaper method of gathering information.

Research was carried out to find out various issues faced by the sales and marketing officers. Objective of this study was to study the strategic initiatives taken to enhance field force efficiency. The effectiveness of Quarterly planning Aid (QPA) among sales and marketing officer was analyzed and drawbacks of QPA were identified and further restructured for better implementation of this tool among its sales and marketing officers.

It was analyzed that there was a need to revise QPA tool in order to enhance the performance of the SO's and MO's. From the research it was concluded that most of the officers were facing difficulty in quarterly planning, due to various uncertainties'. Thus, from quarterly planning it should be changed to monthly planning. Hence, QPA tool was analyzed and restructured and a monthly framework was developed.

# INTRODUCTION TO HPCL

**HPCL** is a **Government of India Enterprise** with a **Navratna Status,** and a **Fortune 500 company,** with an annual turnover of Rs.1,90,048Crores and sales/income from operations of Rs.2,15,675 Crores (US$ 39.726 Billions) during FY 2012-13, having about 20% of marketing share in India among PSU's and a strong market structure.

HPCL operates 2 major refineries producing a wide variety of petroleum fuels & specialties, one in **Mumbai** (West Coast) of **6.5** Million Metric Tonnes Per Annum(MMTPA) capacity and the other in **Vishakhapatnam,** (East Coast) with a capacity of8.3 **MMTPA.** HPCL holds an equity stake of 16.95% in Mangalore Refinery & Petrochemicals Limited, a state-of-the-art refinery at Mangalore with a capacity of 9 MMTPA. In addition, HPCL is constructing a 9 MMTPA refinery at Bathinda, in the state of Punjab, as a **Joint venture with Mittal Energy Investments Pte.Ltd.**

HPCL also owns and operates the **largest Lube Refinery** in the India producing Lube Base Oils of international standards, with a capacity of **335 TMT.** This Lube Refinery accounts for over **40%** of the India's total Lube Base Oil production.

HPCL's vast marketing network consists of 13 Zonal offices in major cities and 101 Regional Offices facilitated by a Supply & Distribution infrastructure comprising Terminals, Pipeline networks, Aviation Service Stations, LPG Bottling Plants, Inland Relay Depots & Retail Outlets, Lube and LPG Distributorships. HPCL, over the years, has moved from strength to strength on all fronts. The refining capacity steadily increased from 5.5 MMTPA in 1984/85 to 14.8 MMTPA presently. On the financial front, the turnover has grown from Rs.2687 Crores in 1984-85 to an impressive Rs1, 32,670Crores in FY 2010-11.

## MISSION:

"HPCL, along with its joint ventures, will be a fully integrated company in the hydrocarbons sector of exploration and production, refining and marketing; focusing on enhancement of productivity, quality and profitability; caring for customers and employees; caring for environment protection and cultural heritage. It will also attain scale dimensions by diversifying into other energy related fields and by taking up transnational operations."

## VISION:

The vision of the corporation is to **delight ourcustomers** through **superior understanding** of their **stated and latent needs** and providing **innovative products and services.**Defining and delivering a truly differentiated and appealing customer experience is at the **heart of our branding.**

We are focused on a **customer centric strategy to delight customers** by **delivering segment specific differentiated** and **suitable value proposition** through **relevant outlet formats.**The customer value proposition of HPCL is to provide **consistent, relevant** and **differentiated** experience to the customers by **providing value added products and services** – both fuel and non-fuel and a strong commitment to deliver good fuel promise by harnessing **state of the art technology.**

In a **paradigm shift** from conventional way of segmenting the customers which was based on market/vehicle type, HPCL has developed **psychographic understanding** of the customers based on their behavior, lifestyle, perceptions, attitudes etc. to help HPCL **deliver the ultimate experience** to the target customer segments based on the international concept of **The Day in the Life of the Customer."**

Based on insights through extensive market research, we launched the innovative concept of **Club HP** which seeks to change the way fuel retailing is carried out in the country by stressing on providing a large bouquet of products & services to consumers and making the entire experience of filling fuel an **"Achchalagtahai"** experience. **Club HP** Retail outlets are positioned on the platform of **"Outstanding Customer & Vehicle Care".** To ensure consistent delivery of superior Customer services; all the Club HP Outlets are audited by M/s **Bureau Veritas**, a reputed **internationalThird Party Agency.**

**Branded Toilets:**

Another USP of HPCL is the **"clean and hygienic"** toilets branded as **"fleurs"** which has been one of the basic customer needs expressed by customers traveling on highways. This is an essential need especially for the women and we have designed separate toilets, with state of the art technology – auto flush systems etc which can be used by the travelers/customers for their convenience. This facility has reinforced a strong alignment in the minds of the holiday revelers to frequent HPCL retail outlets.

HPCL has been ranked as the **"Most preferred (auto) fuel brand"** in the independent market survey conducted by **Synovate**, on emerging markets with TOM (Top of Mind) recall of 28%, far ahead of competitors.

HPCL is in the forefront of providing **right Quality and correct Quantity** fuels to the customer and has taken series of measures for **Quick fill Experience&** Quality Assurance by leveraging technology. The thrust area is **retail automation** of the outlets. The automation provides end to end solution in monitoring the stocks online and the features include **real time density display** at the point of sale to enhance customer confidence, **Multi-product Dispensing (MPD)** Units with advanced features like display of Price, Quantity and Auto cutoff, system generated billing & plugging loop holes across the supply chain through **GPS based Vehicle Management System, electronic sealed** parcel delivery system through trucks and **automatic vehicle** identification.

HPCL is the first company to launch the new age fuel stations under the brand **e-fuel station.** These stations positioned to offer Quality and Quantity assurance offer system generated cash memo, display of real time density and Outdoor payment terminal (OPT) at the fuel Island and provide a unique customer experience at the forecourt for the fuelling customers.

As part of our efforts to preserve and improve environment we have implemented Stage II Vapour Recovery system at our outlets. This pioneering initiative has helped us to improve the **Quality of Air in the forecourt at our Outlets.**

HPCL is the first company to introduce the concept of **New Visual RetailIdentity** to give attractivelook and appearance to its Retail outlets as per world class standards which stand out in the Oil Industry. The **Retail Visual Identity** of HPCL outlets have been acknowledged to be the best in the country.

HPCL has been the **pioneer** in providing **customer conveniences** at the retail outlets which include ATMs, C-stores, Financial services etc. Currently more than 320 ATMs and 150 financial service centers are in operation at HPCL outlets across the country.

To hold customer's attention and engage **customers over their life time,** HPCL has customized loyalty programs for the urban and highway customers. Innovative loyalty program's offering genuine benefits that remain interesting over time are being offered. HPCL is running a powerful card based loyalty program with various card products such as Credit card/ Debit card / Smart 1 card/ Fleet cards etc. The HPCL Co-branded credit card program is one of the most successful in Asia.HPCL has launched India's First credit fleet card **"Drive Smart"** to address the need of Fleet Owners for interest free credit. This unique and pioneering initiative by HPCL is unmatched by competition till date.

Signifying a new era in the Indian loyalty landscape, HPCL developed a coalition program "i-mint" jointly with **ICICI Bank. A break through initiative** has been forged among leading and successful brands i.e.,**Airtel, HPCL, ICICI Bank, Indian Airlines, Life style** and **makemytrip.com** having non-competing, complementary businesses to form together a successful loyalty program, which enable customers, earn reward points at a much higher velocity compared to any of the stand-alone loyalty programs available in the country.

HPCL has conducted market research to understand customer needs and customize appropriate offerings. To cater to the key need of customers' for **hygienic food** at the retail outlets, HPCL has entered into several strategic alliances with **best in class partners** in the non-fuel arena viz. **McDonald's, Kamat group** of hotels, **Café Coffee-day, Marry Brown, US pizza**etc to deliver **high quality&hygienic** food with **efficient and friendly** service to the Customersat our outlets.

To address the basic needs of customers traveling on highways, HPCL outlets now offer **"clean and hygienic"** toilets branded as **"fleurs".** Authoritative restaurants have been provided with

host of customer amenities like Driver Rest Room & Dormitory, Re-creation facilities, secure parking spaces, Vehicle care facilities etc under the Brand "**Club HP Junction**".

To **touch the lives** of people in the **rural sector** and make available quality fuel and convenience at the point of consumption, HPCL has introduced the novel idea of **Hamara Pump**, our rural flagship format. We offer value added services like Seeds, Pesticides and fertilizers to the farmers through "**KisanVikasKendras**" set up at select "**Hamara Pump**" outlets. We have entered into an alliance with **M/s. Godrej Agrovet Ltd.** for setting up their branded rural stores "**Aadhar**" at our **Hamara Pumps**. Through this agreement we are providing "**complete solution**" to the rural community.

HPCL has been maintaining "**Excellent**" performance. The **pioneering initiatives** undertaken by HPCL and the efforts in the Retail sector have received lot of recognition through awards from various forums in the current year also. This is testimony to the success of our Retail Initiatives in delivering the core value proposition of "**Absolute Customer Delight at the point of Interface**" through innovative products and services.

## EVOLUTION OF HPCL:

**1952:** The Company was incorporated in the name of Standard Vacuum Refining Company of India Limited on July 5, 1952

**1962:** On 31st March, 1962 the name was changed to ESSO Standard Refining Company of India Limited.

**1974:** Hindustan Petroleum Corporation Limited comes into being after the takeover and merger of erstwhile Esso and Lube India Undertaking

**1976:** Caltex Oil Refining Ltd. is taken over by the government of India and subsequently merged with HPCL in 1978.

**1979:** Kosan Gas Company, the concessionaries of HPCL in the domestic LPG market, are taken over and merged with HPCL.
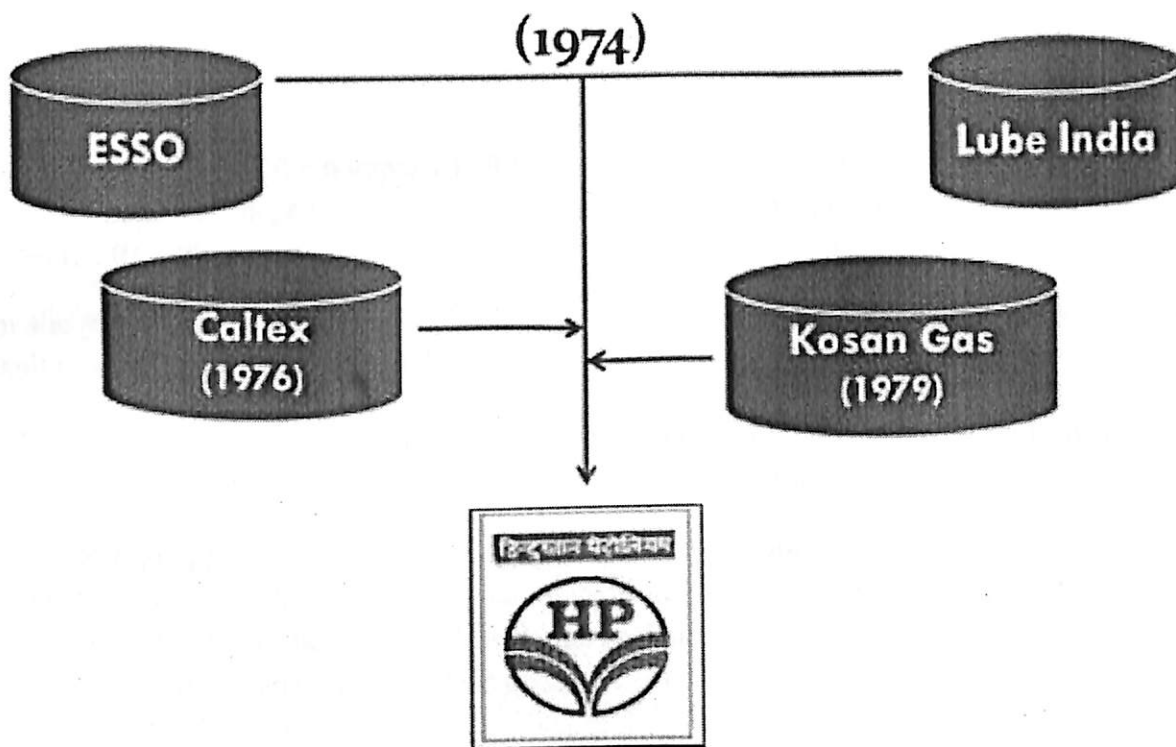
Figure 1.1

HPCL thus comes into being after merging four different organizations at different points of time.

Today, HPCL is a Fortune 500 company with an annual turnover of 206971.93 crores and market share of 26.48% in MS and 24.86% in HSD in India and a strong market infrastructure.

It operates 2 major refineries producing a wide variety of petroleum fuels &specialities, one in Mumbai (west coast) with a capacity of 6.5 MMTPA and the other in Vishakhapatnam (east coast) with a capacity of 7.5 MMTPA.

It holds an equity stake of 16.95% in Mangalore Refinery & Petrochemicals Ltd, a state of the art refinery at Mangalore with a capacity of 9 MMTPA.

It also holds an equity stake of 49% in HPCL-Mittal Energy Ltd

HPCL also owns and operates the largest lube refinery in the country producing Lube base Oils of international standards with a capacity of 335 TMT. This lube refinery accounts for over 40% of India's total Lube Base Oil production.

HPCL's vast marketing network consists of 7 Zonal offices in major cities and 101 Regional Offices facilitated by a Supply & Distribution infrastructure comprising Terminals, Aviation service stations, LPG Bottling Plants, and Inland Relay Depots & Retail Outlets, Lube and LPG Distributorships.

The profit after tax of the company is Rs.904.71crores in 2012-13 as compared to 911.43 Crore in 2011-2012. The depreciation charge is Rs.1934.42 crores in 2012-13 vis-a vis Rs.1712.93 crores in 2011-12.

For the year 2012-13, HPCL has proposed a dividend of Rs.8.5 per share. The dividend would result in a total payout of Rs. 287.84 Crores including dividend distribution tax.

The 2009-10 performance of the corporation has qualified for 'excellent' rating in terms of the memorandum of understanding (MOU) signed with the government of India.

Use of technology to ensure the operation of automated outlets under NANO (No Automation No Operation) program will be a focus area in the coming year. Marketing participation of HPCL is proposed to be increased with network expansion and efforts will be directed at becoming a market leader at the district level.

## Recognitions / Awards:

HPCL has bagged the following awards:

❖ CMO Asia Awards on 22nd July, 2011 at SUNTEC Singapore International Convention and Exhibition Centre for

- o **Award for Brand Excellence (Service and Hospitality Category)**
- o **Award for Best Loyalty Program**
- o **Award for Best Marketing Campaign of the Year**

❖ HPCL bagged the coveted **Reader's Digest Trusted Brand Gold Award 2011**. It is a matter of pride that HPCL has been receiving this award for the sixth year in succession.

❖ HPCL was awarded the **Reid & TaylorRetail ExcellenceAward** in the category of **Best Retail Marketing Campaign** ("HP Happy Wheels") of the year 2010& **Best Customer Loyalty Program** (Drive Track Plus) for year 2010 at the Asia Retail Congress in Feb 2010.

- ❖ HPCL has bagged the **"FORECOURT RETAILER OF THE YEAR"** AWARDat the Star Retailer Awards 2010 held on 12, December 2010 at a grand Corporate Global function held at Delhi for the **fifth year in succession.**

- ❖ HPCL Awarded for **Brand Leadership in Service/Hospitality Industry** (Forecourt Retailer) at the World Brand Congress 2010 held on 24, Nov 2010.

- ❖ CMO Asia Awards on 23rd July, 2010 at SUNTEC Singapore International Convention and Exhibition Centre for

  - ○ **Award for Brand Excellence:** Service and Hospitality Category.

  - ○ **Award for Best Loyalty Program**

- ❖ **"Retailer of the Year - Forecourt Retailing"** at the Asia Retail Congress 2010 for the third year in succession.

- ❖ **Brand Leadership in Service Industry Award** at the **World Brand Congress 2009** held on 4, November 2009.

- ❖ **"Star Retailer – Forecourt Retailer of the Year"** Award at the **Star Retailer Awards 2009** held at Delhi on November 20, 2009 for the **fourth year in succession.**

- ❖ **"The CMO Council Market Leadership Award"** at the CMO Awards & Conference on Marketing held on 20th November 2009 at Indore.

- ❖ HPCL has been awarded the prestigious **NDTV Profit Business Leadership Award 2008** in the category of Oil & Gas. The Award honours business excellence & recognizes companies that have fuelled the Indian economy to currently being among the fastest growing economies in the world.

- ❖ **Silver Trophy at empi-Indian Express Indian Innovation Award** for Benchmarking standards in Retail Automation and implementation and adaptation of IT for improved logistics and cost reduction in the Indian Petroleum Industry from the Honorable Former President of India Dr.A.P.J. Abdul Kalam on December 22, 2007

- ❖ HPCL was awarded the **Reid & TaylorRetail ExcellenceAward** in the category of **Forecourt Retailer of the Year 2009** at the Asia Retail Congress in January 2009.

- ❖ **Star Retailer- Fore court Retailer of the Year** award by Franchise India Holding Ltd in December 2008 for the third consecutive year.

- ❖ Most admired **Retailer of the Year - Forecourt Retailing Award 2007** at the Images India Retail Forum in August 2007 for the second successive year.

- ❖ Greentech 'Gold award' for **Environmental excellence** in Petroleum sector for the year **2008** presented to our Hassan terminal.

- ❖ **HPCL** conferred with **INDIA STAR** 2008, the highest national recognition award for excellence in packaging in India in Consumer pack category for **marketing** Lubricant Oil in PET bottle.

- ❖ "Finalist" in the category of "**Emerging Market Retailer of the year**" for **The World Retail Congress 2008** Awards for the second successive year.

- ❖ "**Most Admired Retailer of the Year – Fuel Retailing**" **award** at theImages **India Retail Awards 2007** in August 2007 for the second successive year.

- ❖ "**Power**" has been awarded "**India's Most Preferred Auto Fuel**" at the CNBC Awaaz Consumer Award 2007 in the "**Auto Fuel**" category on August 24, 2007 for the second successive year.

- ❖ "**Finalist**" in the category of "**Energy Company of the Year 2006**" at the **Petroleum Economist Awards 2007**.

The **Recognition conferred on HPCL by the customers and the Retail industry**is the beginning of a long standing relationship that HPCL wishes to build with customers to be the **Preferred Choice** by the customers and become a Global Player.

## Target Audience:

At HPCL defining and delivering a truly differentiated and appealing customer experience is at the **heart of branding.** We are focused on a **customer centric strategy to delight customers by delivering segment specific differentiated and suitable value proposition through relevant outlet formats.**

In a significant departure from traditional way of segmenting customers based on vehicle type, a detailed process for in-depth understanding of the customer based on the psychographic, behavioral and attitudinal dimensions have been developed which helped the retail SBU understand the customer in a much more granular basis and position the offers and services to deliver the appropriate value proposition to the customer.

Based on a nationwide market research conducted across 35 centers with over 14,000 respondents we have arrived at 10 distinct customer segments – **Upwardly Mobile, Gen Next, Walk-ins, Hum Log** (Common People), **Dependents, Driver Saheb, Fleet Owners, Highway Raja, Humrahi** (Highway Travellers) &**khushaal Kisan** (Farmers).

## Our Positioning:

Good retail touches all segments, all locations and all formats. We have used the guiding principles of **better visibility, easy manoeuvrability, convenience, parking,modular expansion,Integration of structure, differentiation of facilities** and **land scaping** to arrive segment specific formats. The **customer – focused formats** have helped HPCL differentiate itself from competition in the mind of the customer.

Based on the stated and latent customer needs identified through the market research, we have developed seven (7) distinct formats and aligned the offers that the customer seeks by **delivering a unique and differentiated customer service** which will make the customer loyal to HPCL. To reward, loyalty we had segment specific loyalty reward programs.

## HP Express:

HP Express is an outlet which offers a **guaranteed quick fill** and **a good filling experience** to the customers. The outlet will have **premium ambience and environment** and will offer high level of **customer service**. It will be an outlet with **attractive aesthetics and modern technology.** HP Express will offer **convenience** to the customers with the **services offered at the fueling bay** as well as through the **non fuel offers.** Customers will be assured of Q&Q at HP Express

## HP Class:

HP Class is a clean outlet with an assurance of Quality and Quantity. **The staff would be trained to professionally and courteously handle the customers.** The outlet will provide value for money to the customers for the products and services they buy at the outlet. Good ambience with some greenery and useful non fuel offers will also be offered to the customers coming to HP Class

## HP Apna:

HP Apna is a **no frills** fuel outlet. Customers will be provided **friendly service.** The outlet will be assure customers of **Q&Q** and actively communicate it. The outlet will offer **discounts on the products and services** and will also provide offers for **vehicle care.** Keeping in mind the vehicle type, the outlet will be designed to aid better **manoeuvrability** of vehicles. The outlet will also offer periodic **innovative promotions on fuel**

## HP Junction

HP Junction is the "**home away from home**" for the tired and weary trucker or a destination for the highway traveler. It will provide the full range of facilities that a trucker / traveler would need to **rest, refuel, recreate and refresh**. The customers would be assured of getting courteous and friendly service, emergency vehicle repairs and Q&Q. Typically built over a larger area, HP Junction will provide to the customers safe and secure parking in addition to the various facilities. This outlet will also have a place to eat reasonably priced homely food at the Dhaba or eat at the restaurant / food plaza. Customers will have an option to access information about the routes or destinations close to the outlet and the attendants would also try to perceive customer needs and guide them to the facility / offer if available

## HP Highway

HP Highway is a **no frills** fuel outlet. Customers will be provided **friendly service** and will be assured of **Q&Q**. Apart from **basic amenities** this **conveniently located** outlet will offer **some products and services** that can add to the convenience of customers

## HP Hamara Pump

HP Hamara Pump is a simple, **no frills** environment for the rural customer at a **convenient location for rural customers**. Customers will be assured of the **quality and quantity** of fuel. HP Rural will seek to build relationships with rural customers by way of providing **courteous and friendly service**. Outlets with a Kisan Vikas Kendra will serve as a one stop shop for the customers daily as well as their farm needs.

## Retail Formats & Target Segments:

Table 1.1

| Demographics | Retail Outlet Formats | Target Segments |
|---|---|---|
| Urban | **Hp Express:** A good looking outlet with modern technology offering quick fill and convenience | • Upwardly Mobile<br>• Gen Next<br>• Walk Ins |
| Urban | **HP Class:** A clean outlet with some non-fuel offerings | • Hum Log<br>• Dependants<br>• Walk – Ins |
| Urban | **HP Apna :** A friendly no frills low cost fuel outlet with basic facilities | • Driver Saheb<br>• Highway Raja<br>• Fleet Owners |
| Highway | **HP Junction:** An outlet to refuel, refresh and relax for travelers and truckers | • Highway Raja<br>• Fleet Owners<br>• Humrahi |
| Highway | **HP Model:** An small format outlet to refuel and refresh for travelers and trucker | • Highway Raja<br>• Fleet Owners<br>• Humrahi |
| Highway | **HP Highway:** An outlet to refuel | • Highway Raja<br>• Fleet Owners |
| Rural | **HP Hamara Pump:** A simple outlet with a small store | • Khush-haal Kisaan |

# Loyalty Club Name:

**Our Loyalty programs are structured marketing efforts that reward, and therefore encourage, loyal buying** behavior — behavior which is potentially of benefit to the Customer as well as the firm. We have Customised card based Loyalty programs for different segments, Viz.,

1. i-mint multi-party coalition card – For urban customers and travellers
2. Co-Branded Credit Cards for Urban customers
3. Drive Track Plus for Commercial Fleet Segment

> **i-mint multi-party coalition card:**

HPCL partnered with select major brands and launched **India's first coalition loyalty program** on 5th September.



Figure 1.2
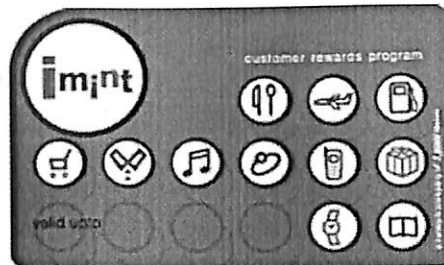
> **Co-Branded Credit Cards for Urban customers:**

HPCL-ICICI CO-BRANDED CREDIT/DEBIT CARD:



Figure 1.3

> **Drive Track Plus:**

Prepaid card for fleet operators



Figure 1.4

# Branding the Retail Outlets – Club HP

HPCL has pioneered the innovative concept of **Club HP** retail brand which has changed the way fuel retailing is carried out in the country by stressing on providing a large bouquet of products & services to consumers and making the entire experience of filling fuel an **"Achcha Lagta Hai" (I am Feeling good)** experience.



Figure 1.5

**The moment of truth is at the point of customer interface which is the forecourt at retail outlets.** To enhance customer experience, HPCL has provided the Best in class infrastructure, facilities and Retail Visual Identity Program. To improve service delivery, HPCL has chosen the platform of **"Outstanding Customer & Vehicle Care"** under the brand of **Club HP** which offers a bouquet of products and services relevant to the customer segment. Club HP Outlets offer the following:

1. **Quality & Quantity Assurance**
   - Branded Q & Q Tower
     - Q & Q checking equipment
     - W&M Calibrated 5 Ltr. Can
     - Calibrated Hydrometer with jar
     - Calibrated Thermometer
     - ASTM 53-B Table
     - Q & Q testing procedure booklet
   - 5 customers are invited daily for Q & Q check and records maintained

2. **Customer Care**
   - FS and FSM will be in complete uniform
   - Forecourt Manager will inform customers about available products / services
   - Dedicated persons for
     - Windshield cleaning
     - Free Digital Air
     - Quick care point (QCP)
   - Invitation for Q & Q check of 5 customers
   - First Aid kit
   - Drinking water
     - Water cooler with visible Water purifier (not only filter) will be provided
   - Clean Toilets
   - Finance Services
   - Refreshments
   - Communication Facility
   - First Aid & OTC Drugs

3. **Vehicle Care**
   - Accurate Air Pressure
   - PUC Check
   - Quick Care Point (QCP)
     - Engine Oil
     - Coolant
     - Brake Fluid
     - Distilled Water
     - Fan Belt
     - Puncture Facility

4. **Branded Fuels**

5. **House Keeping**

6. **Quick Fill Experience**
   - Electronic D/Us
   - Driveway free of obstacles / parked vehicles – constant direction by Forecourt Supervisor
   - Quick filling by driveway boys
   - Credit card readers provided at a prominent place
   - Multiple pay-points.

The implementation of our customer centric formats, authoritative non fuel offers and differentiated customer & vehicle service on the platform of **Club HP** helped us **transition** from an ad–hoc service provider **to anauthoritative,convenience – retailer** of fuel and non – fuel products and services.To further improve the forecourt services, bring transparency in the retail outlet operations and remotely control the processes at the retail outlets, **HPCL has leveraged technology and introduced the new age e-fuel stations in the country.**

## Retail Channels:

HPCL has branded the convenience stores as "C-Stores" . All the C-Stores are operated at Company Owned Filling Stations but operated by professional partners like Soubiksha, Radhakrishna Foodland, HPCL dealers, etc. While HPCL does not operate the C-Stores, we have adequate Checks and balances in the Franchisee agreement to ensure customer service.

To cater to various day-to-day buying needs of customers, HPCL has entered into agreements with Operators like leading Banks, GE Money, Cafe Coffee Day Express, etc. for providing financial services, dispensing beverages; e-commerce enabled business, etc. so that customers can save time while fuelling at forecourt. We are also having e-payment kiosks for payments of monthly bills by customers through Kiosks.

# RETAIL AUTOMATION AND SYSTEM

**Introduction & Objective:**

Retail Automation is the automation of all the operations and business processes of a Retail Outlet by capturing, collating and analyzing all the transactions electronically.

The basic intent of the Retail Automation system is to manage all forecourt, sales room (at the outlet) and HPCL Regional office operational & business transactions pertaining to Retail Outlets.

The main objective of Retail Automation is to provide Customer Relationship Management through confidence building by eliminating manual intervention, increasing the speed of transaction & operations in order to provide Quick Fill Experience. This is intended to support the enhancement of 'Club HP' brand in addition to increase in sales of all products and services. Hence this initiative is based on the Q & Q and Good Fuel Promise context.

Approx. 1680 retail outlets have been automated & are online as of date. The outlets thus automated have been branded as e-fuel stations.

**Main Features of Retail Automation System:**

Main features of the system include:

a) Automatic capture of dispenser data for each transaction including unit rate.
b) Computerized receipt generation for actual quantity dispensed.
c) Online density of product displayed at the point of dispensation for customer to see & verify.
d) Automatic capturing & reconciliation of product inventory & sales.
e) Credit / debit card payments possible at the point of dispensation in front of customer, thereby reducing the risk of fraudulent transactions & quick turn-around time.
f) RF-based attendant tagging for mapping each transaction against a delivery boy.
g) Variety of system generated reports at the outlet as well as Regional Office level.
h) Central price change can be pushed remotely from Regional Office Server to a cluster of automated retail outlets.
i) Real-time remote view of the automated outlets; thus making it easier for sales officers to carry out remote inspection of the outlets anytime & anywhere.
j) Online CRM possible by capturing vehicle number at the island for each transaction at the Outdoor Payment Terminals installed therein.
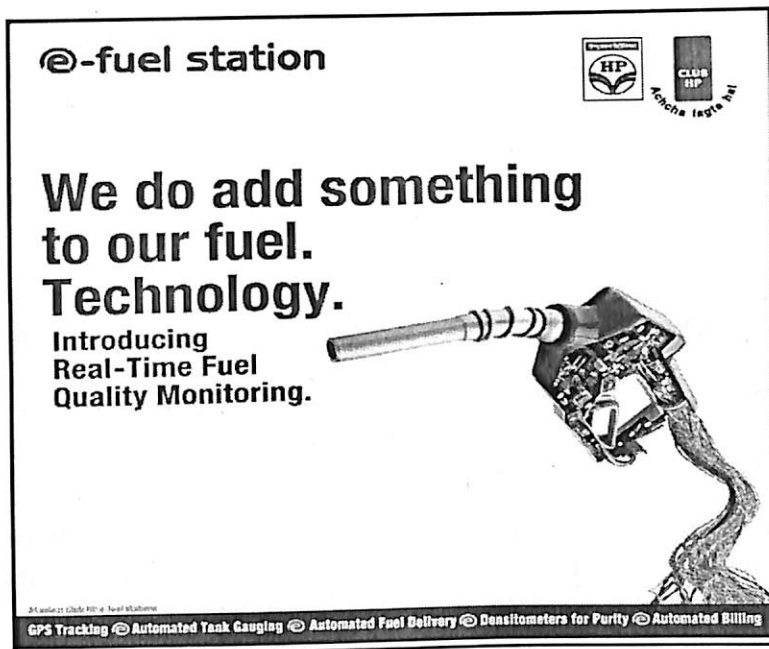
Figure 1.6

**Benefits to customer**

The Customer benefits through:

- Assured product Quality, Quantity and Service instills confidence in the mind of the customer
- Efficient Management of all the facilities for himself and his vehicle provided by Club HP' Retail Outlets
- Quick Service at the Retail Outlet – minimal wait or transaction time due to faster operations.
- Convenience of payments by cash, paper coupons (accounts), credit, debit or pre-paid smart cards at the point of dispensation.
- Knowledge of customer preference through CRM, faster & accurate implementation of price change & display of density on real time basis result in enhanced customer focus.
- Customer Service through customer specific sales promotions and analysis of impact possible through the system.
- Better inventory control as well as quality control by integration with Automated Tank Gauging system prevents dry-outs & thus inconvenience caused to customers.
- HPCL's complete control and check on malpractices / misdemeanours by outlet staff / dealer-men & its early detection further results in more efficient administration by HPCL, thus building customer confidence.

**HPCL will additionally benefit as the system:**

- Provides transparency and control of all facets of Retail Outlet operations. This will enable better enforcement of Marketing Discipline Guidelines and efficient administration.

- Creates Standard look and feel of all stations that will enhance brand building of 'Club HP' brand and foster the automation brand of e-fuel station.
- Generation database of transactions by product, volume, value, frequency etc. This will enable HPCL to implement Customer Relationship Management as well as reinforce internal control and analysis
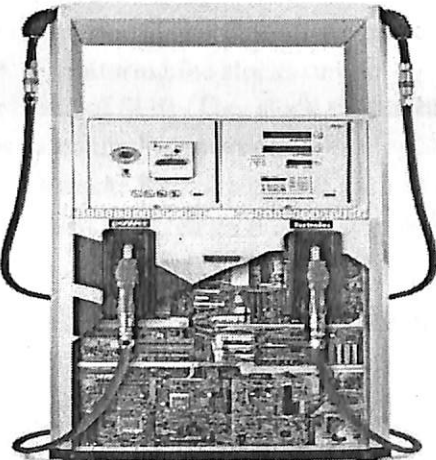
## e-fuel station: Leveraging technology for Quality Assurance

**Quality** continues to be the uppermost concern for 84% of consumers. In line with the **International practice** of Quality assurance through Quantity checks, we have leveraged technology and introduced **Retail Automation** at our Retail outlets.

The objective of **Retail Automation** is to enhance the **Club HP Brand** and provide Customer Relationship Management through confidence building by eliminating manual intervention, increasing the speed of transaction & operations and direct interaction with the customer. This initiative leverages technology to enhance the customer experience at the **Club HP** retail outlet.



Figure 1.7

# Innovation: NANO

**HPCL developed a unique Process called NANO (No Automation No Operation) to Plug Gaps in Retail Automation Solutions at Retail Outlets thereby ensuring Quality & Quantity Products to customers.**

NANO ensures that all Fuel Dispensing related equipments at Retail Outlets are **ONLINE, negligible DOWNTIME** of Automated equipment and **carries out continuous material balance reconciliation** to detect receipt of any unauthorized material by the Dealer thereby delivering **right Quality & correct Quantity products** to Customers through Dealer Operated Retail Outlets.

Retail automation provides end to end solution in monitoring the stocks online and the features include **real time density display** at the point of sale to enhance customer confidence, **Multi-product Dispensing (MPD)** Units with advanced features like display of Price, Quanity and Auto cutoff, system generated billing.

These automated retail outlets have been branded as **e-fuel stations** under brand extension of Club HP, thus providing an added value to the customer. HPCL is the first company to launch the new age fuel stations under the brand **e-fuel station.**

These stations positioned to offer **Quality and Quantity assurance** also offers:

> ➤ System generated cash memo
> ➤ Display of real time density
> ➤ Out door payment terminal (OPT) at the fuel Island
> ➤ Provide a unique customer experience at the forecourt for the fuelling customers.
> ➤ Monitoring the Operations online
> ➤ Monitoring the stocks online
> ➤ end of Shift / Day stock reconciliation modules
> ➤ Remote Diagnostics
> ➤ Remote Price changes at each of the outlets
> ➤ History & retrieval of Customer Transactions

## The benefits of e-fuel station to customer are:
> ➤ System Driven Processes
> ➤ Computer Generated Receipts
> ➤ Real time Density display at the Point of Sale
> ➤ Payment Cards Swiped on the Island in Customer Presence
> ➤ Vehicle Registration Number Captured in Receipt
> ➤ Quality & Quantity perception in the mind of the customer
> ➤ Quick Service at the Retail Outlet – minimal wait or transaction time due to faster operations

HPCL has completed retail automation at over 1680 outlets. The Photographs of the outlets and the pictorial description of the features of e-fuel station outlets are given in the attachment to this annexure.

## Innovation Mechanism: NANO

To further enhance Customer service delivery leveraging Automation, we have introduced a novel initiative of **No Automation No Operation (NANO)** under which, if any of the components at the Retail outlet viz., DUs, Storage tank probes etc are off line, the fuelling operations are automatically suspended from the Retail outlet.

This was done by reverse engineering the Bypass systems in each of the Modules of Fuel Delivery thru DUs, Fuel storage in UG tanks and POS terminals to trigger a suspension of Sales once any module has been detected to be off-line / running in manual mode. This required a lot of coordination with Dispensing Unit Manufacturers and Automaton vendors, standardization of DU protocols and implementation of a central Automation Control Room to track the logs for deviations / Downtime maintenance by Vendors etc.

## e-fuel Campaigns :

In line with the **International practice** of Quality assurance through Quantity checks at the point of sale, we have initiated a nationwide **"e-fuel campaign"** to educate the customer, create awareness, involve the stake holders from Government customers on the features and system control checks at e-fuel stations.

The perception in the minds of the customers can be changed only by empowering them to check and witness the Quality aspects and surveillance measures adopted. Special meetings are held at the retail outlets to inaugurate the campaign at the local levels. These campaigns have been inaugurated in the presence of senior officials from the government like Principal Secretary, Commissioner of Food & Civil supplies etc.

The photographs of the Campaign are given in attachment to this annexure. The abridged speech of the visiting dignitary is provided in the accompanying CD.Opinion makers and officials holding responsible positions in the society like NGOs, eminent personalities, Gazetted officers, Principals of schools, Colleges etc were invited to check the quality/witness the procedure periodically. This has increased the confidence in the minds of the customers.Print and television media have been extensively used to create publicity for the program apart from messages on the hoardings at HPCL outlets. There was a need to create awareness. In addition, the forecourt manager also prompted customers. The regional managers organized workshops inviting customers and imparted formal education on aspects of e-fuel station.

## Results:

This initiative by HPCL was well appreciated by the customers, media, Industry experts and GOI. In terms of Commercial Impact, the additional cost of implementing NANO is less than 4% of the cost of Automation Solution at the outlet, whereas HPCL has realized greater than Industry Growth at the outlets where NANO has been implemented.

NANO outlets which represent less than 18% of HPCL Retail Outlet Network but constitute about 60% of our MS / HSD Retail sales in the first year of implementation. This shows a growing preference of customers to NANO outlets.

In respect of Socio-economic Impact, NANO is testimony to bring a change in the attitude of Dealers especially of the semi-urban / rural geography. The large population of customers in these geography's are now assured of Q&Q products, which hitherto, was based on regular Inspection & random sampling of products manually at the retail outlets. The Indirect benefit to environment is reduction of pollutants and improvements of Air-Quality as Adulterants which emit pollutants have been eliminated from the fuel process delivery to customers through technology Intervention. The voice of the customers who have experienced the service at e-fuel stations has also been provided in an audio file in the accompanying CD.

# TRAINING

Training is an ever evolving requirement in any organization. An organization to meet its corporate objective and to complete in market keeps on developing new initiatives and hiring different people for different kind of work. Retail SBU in HPCL commands almost 60% of share in marketing with network spread of 11000+ Retail outlets and strong field team plan in India. In Retail SBU HPCL is having touch with the customers through this network. Hence it becomes important to impart right knowledge and training for field offices and Dealer network. While Retail has been growing at a decent pace and recording increment in Market Share, the competitors are not lagging behind and are coming up with counter strategies. To meet its vision statement HPCL has also come up with long term strategies: Strengthen and deliverance of service at POC (Point Of Contact),Ties with end customers, Look and Feel of outlets and staff, strengthening the processes being employed at Retail outlets, improving customer perception and confidence, upgrading product knowledge and system integration etc. These initiatives require balanced systemized functional approach to have total transitional flexibility and modular mobility.

**"It's all to do with the training: you can do a lot if you're properly trained."-Elizabeth II**

**PURPOSE:** To meet the above requirement training modules were made and training was conducted. In order to systemize and give more professional feel to the activities it was thought to develop a long term plan for various trainings being imparted to different participants. Training often is considered for entrants only. This is a myth because ongoing training for existing employees helps them adjust to rapidly changing requirement. The need is to focus on issues that impact business operators from high level business plan writing to daily operational issues such as customer retention.

**SCOPE:** The training plan encompasses the organizational objectives, assessment of knowledge gaps, understanding the needs and desires of the customer and adopting the methods and techniques to enhance capabilities to meet marketing challenges.

To determine the approach to deliver training that is consistent with user's requirements the assessment was made and need of Just in time training was envisaged. Various methodologies and processes were evaluated, which included class room training, workshops, meetings and online mode.

To reach every individual requiring training web based application was found to be more effective in accessibility and on cost. It also provided flexibility for course creator as well as participant to tailor the module and time, suiting their convenience.

While new entrants to retail are identified, the existing participants are identified through meetings and regular interactions. Basic feedback course content is designed on the principles of maximizing the value and minimizing the time.

Point of contact: A participant desiring to enroll himself for training may require to seek assistance of following POC:

OFFICERS:

- Zonal Training managers

- Training & Promotion Dept at HQO

- Teachers/course creators for clarity and additional information on course

DEALERS:

- Concerned Sales Officer

- Regional Office

- Teachers/course creators for clarity and additional information on course

# TRAINING PROCESS

## Roles and responsibilities

a. Role of central administrator

- ✓ To maintain web site
- ✓ To add/assign/enroll teachers, Guest teachers and student
- ✓ To monitor progress and analyses assessment tests
- ✓ To update modules and assignments as per need assessment
- ✓ To facilitate forum and chat for clarifications and queries

b. Role of Trainer/Teacher

- ✓ To enroll students
- ✓ To create course
- ✓ To monitor progress of enrolled students and update modules

c. Role of Student

- ✓ Self-enrolment
- ✓ To study modules available
- ✓ To appear for assessment tests
- ✓ To provide feedback on modules/assignments

d. Role of Guest Teachers

- ✓ To create course
- ✓ To provide clarification/answer queries
- ✓ To prepare question bank and forward to central coordinator

## Techniques and tools

This is an electronic learning tool based on Moodle i.e Modular Object-Oriented Dynamic Learning Environment works on open –source software and being used as a fully online course or to augment the face to face course. The program is widely used for its user friendly features :Training Enrollment; Agenda; Resource;Quizzes.

Moodle is a learning management system developed by educators for and offers many channels for differentiated learning activities. Faculty can upload documents, assignment instructions, links to web sites and media. In this secure, password protected environment, learning can be extended beyond the limitations of a traditional classroom setting through chat sessions, discussions, collaboration spaces, quizzes, surveys and more.Moodle allows instructors to add all content and activities on the course homepage. Students are able to see and access all related content and activities from the main course page rather than having to navigate between various areas of the course to access different types of materials. Instructors group content and activities into modules, which can be organized by topics or by weeks. Training modules are available in ppt, xls or word format for which a participant/teacher needs to have MS Office as compatible OS. To commence with the following activities –Statistics, general information on oil industry; Standard operating practices(SOP);Outlet Diagnostic and Monitoring tool(ODMT);Allied Retail Business (ARB);Loyalty Program; Auto LPG; DU Maintenance; Lubricants; Inspections and Sampling Procedure; Housekeeping, Safety and environment; Retail outlet automation; Channel management and other initiatives.

This content is divided into modules. Modules serve as clusters of related course materials. Every module should be clearly labeled by the topic and/or dates it apples to. Module displayed at the top of the page which does not have a number at its left is reserved for course title, generic course info and documents (i.e. syllabus, course policies, course schedule, grading rubrics etc.).It includes a new forum (discussion board) by default.Once initial training sessions have been completed, updating it every year needs to be integrated into the corporation's strategic planning and workforce planning processes. Training plan can help organization grow, recognize the achievement of and retain individual employees, improves the performance of new employees and act as a check on the practicality of strategic plan and workforce plan. Assessment of knowledge gaps will help in modifying the training modules with the availability of resources and competent trainers. This shall even need to revise the plan during the year to better support existing work objectives, adapt to new work objectives or take advantage of new opportunities.

Moodle technique was not that beneficial .New tool was adopted i.e. Quarterly Planning Aid (QPA) to increase the efficiency of the officers.

# QUATERLY PLANING AID (QPA)

The online Quarterly Planning Aid Portal for retail SBU field officers was inaugurated by marketing director Smt. Nishi Vasudeva.QPA program was developed and was implemented in April 2013.The QPA Portal enable the field to plan, prioritize and focus on key outlets/customers –eventually translating into higher TPO (Throughput per outlet) and enhanced customer satisfaction. This QPA application was designed and developed by the IS department.

Basically Quarterly Planning is a four step Process consisting of:

- Using Outlet Classification Aid

- Using Quarterly Planning Aid

- Process of uploading quarterly plan on Retail Collaboration portal

- Monthly review & analysis of actuals vis-à-vis the plan.

Quarterly Planning process starts from outlet categorization which assists the sales officer to prioritize outlets into Growth, Sustain and Manage category by identifying the untapped potential at each outlet. Once outlets are categorized, Sales officer plans his activities for the quarter in consultation with the Regional Manager. The finalized plan is then uploaded on the on-line QPA portal which checks for data consistency and accuracy.

The Sales officer is expected to review his performance against plan at the end of each month and upload the monthly monitoring sheet on the online portal. The QPA portal will enable the field to plan, prioritize and focus on key outlets/customers—eventually translating into higher TPO and enhanced customer satisfaction. The retail SBU has been constantly working towards improving and empowering the field to focus on their core activities and enhance contribution to the Retail SBU.

QPA online tool is basically a self- improvement technique and it was designed for sales officer and marketing officer. Through this tool sales/marketing officer are able to Plan their schedule timely so that they can focus on the core activities. This tool helps sales/marketing officer to perform to their highest level of efficiency.

Earlier sales officer spend their time disproportionate on non-value added activities which resulted in various issues like they were not able to focus on their core activities and eventually low time was spent on core activities by the sales officer.

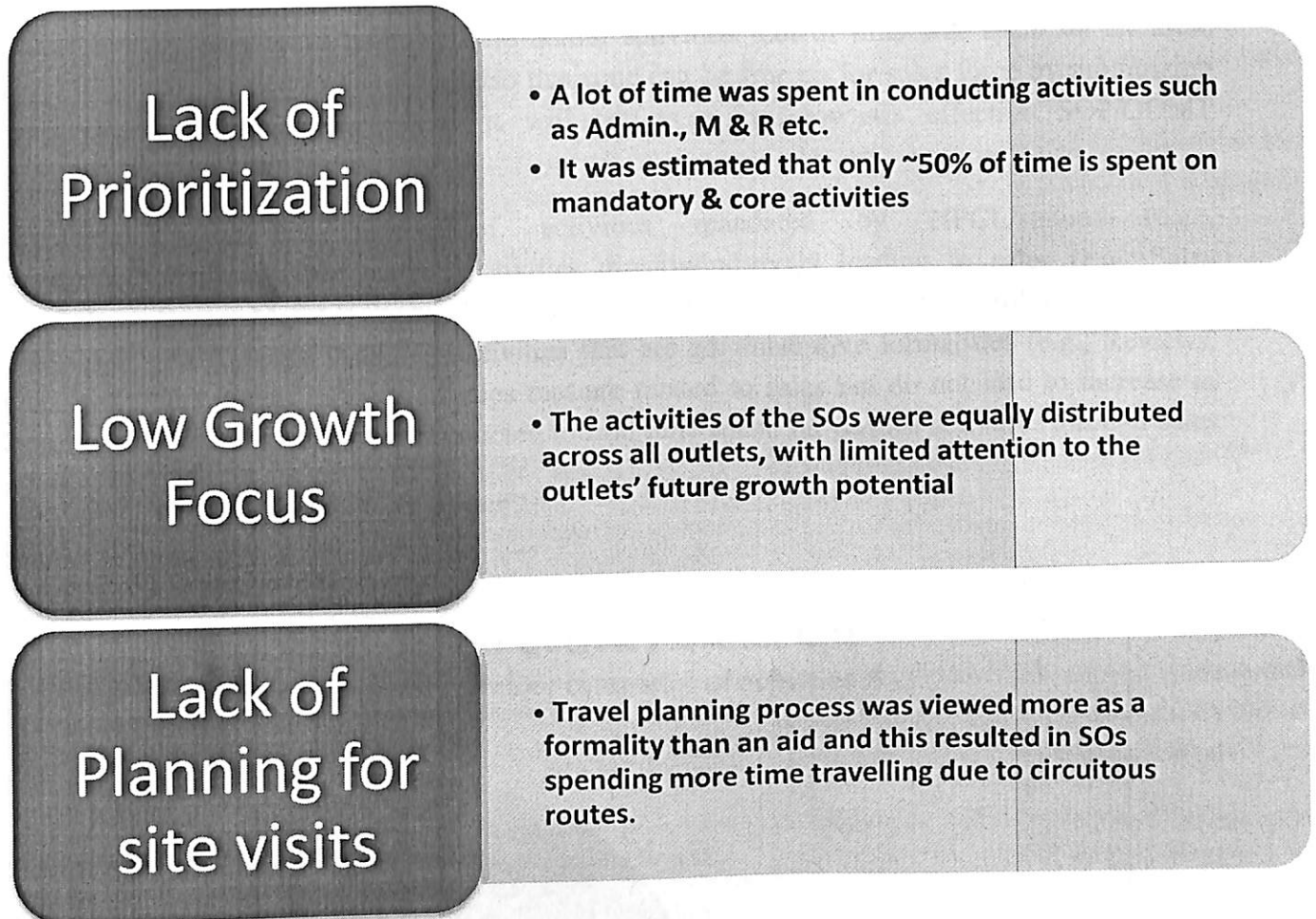Issues faced by sales officer were:

| | |
|---|---|
| **Lack of Prioritization** | • A lot of time was spent in conducting activities such as Admin., M & R etc.<br>• It was estimated that only ~50% of time is spent on mandatory & core activities |
| **Low Growth Focus** | • The activities of the SOs were equally distributed across all outlets, with limited attention to the outlets' future growth potential |
| **Lack of Planning for site visits** | • Travel planning process was viewed more as a formality than an aid and this resulted in SOs spending more time travelling due to circuitous routes. |

Figure 2.1

These were the main issues faced by the sales officer.

First issue faced by SOs was Lack of prioritization. Activities which needed to be performed by the SO were not prioritized. Lot of time was spent on other activities which resulted that only half of the time was spent on mandatory activities and core activities.

Second issue faced was low growth focus. Sales officer were giving low focus on Growth outlets. Activities of the SOs were equally distributed across all outlets thus sales officer were not able to give more attention to the outlets which were having future growth potential.

Third issue was that Lack of planning was done for site visits. Huge amount of time of SOs was wasted in traveling due to lack of planning. Travel planning process was viewed more as a

formality than an aid and this resulted in SOs spending more time travelling due to circuitous routes.

Sales officer has to perform various activities i.e. mandatory activities, support activities, other sales activities, core sales activities and admin activities. Lot of time was spent on all these activities which needed to be managedso that time can be free up for sales force by minimizing focus on non-core activities thus it will act as a key towards effective SOP/ODMT implementation.

Mandatory activities consists of activities mandated by HPCL/statues (e.g.,, inspection/Sampling); Core sales: Activities directly/indirectly leading to sales (e.g., Sales Campaigns, Dealer Mgmt.); Support: Activities that are more related to other roles (e.g., M&R, Data mining/ MIS, etc.), Admin.: Activities that are administrative formalities (e.g., Reviews, Misc. activities); Other Sales: Activities that are related to sales but do not lead to increase in sales directly. A pilot study was conducted to find time spend on various activities through sales officer activity break up.



**Sales officer activity break up:**
Time spent on six major categories of activities %

- mandatory
- core sales
- support activities
- Admin activities
- other sales activities
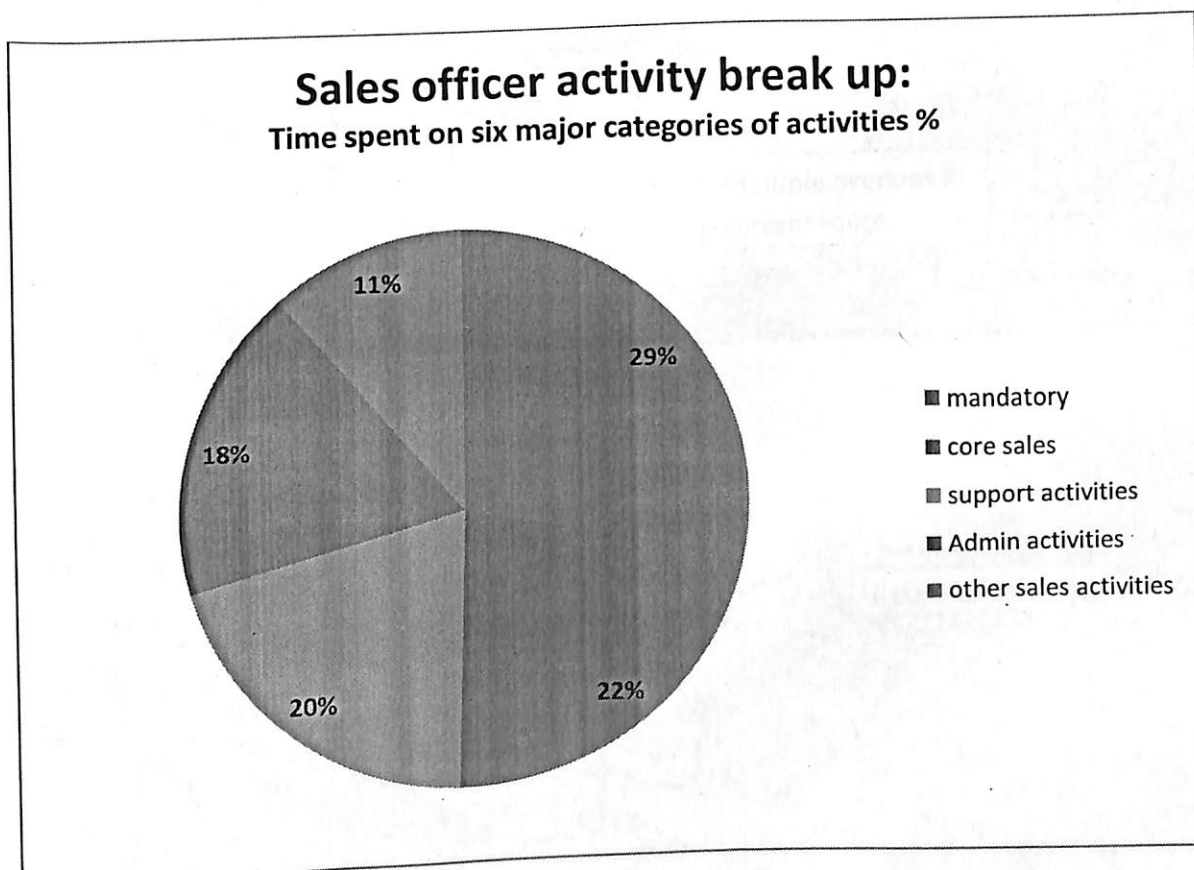
Figure 2.2

Through this chart it was analyzed time spent on admin., support activities was more than required. Hence, there was need to reduce time for such activities so that they can focus on core activities.Outlets were categorized as Growth, Sustain and Manage. Same priority level was set for all outlets. With "one size fits all" approach for all outlet categories, there was low focus on outlet prioritization & on-site activities among field.

Certain activities such as travel were not well planned thereby taking up more time than required. As travel itineraries are not well-planned thus it was leading to certain problems like – Route overlaps and wastage of time. Constantly changing priorities were preventing SOs from following their original travel plan. Travel itinerary was viewed as an admin. requirement than as a planning tool. Especially for upcountry SOs, travel planning was very crucial. Thus, if optimal route was adopted it led to approx. 31% reduction in time travel.

## Travel Analysis – Site Visits by Sales Officer

### Scenario 1 - Normal Route (actual travel plan)



Distance: ~ 841 km

Time: ~13 hours

Base location

Multiple overlaps in current route
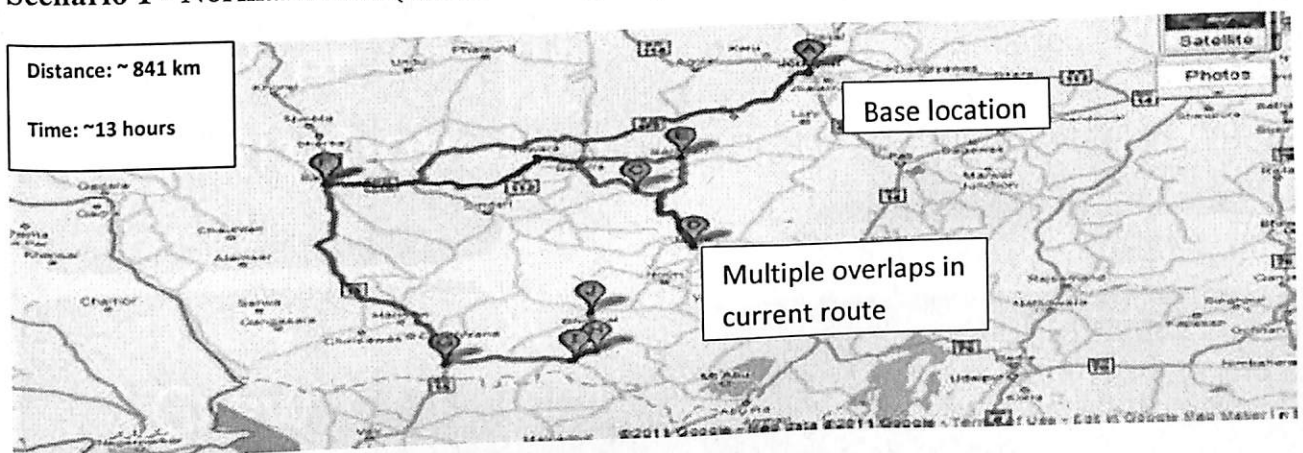
### Scenario 2 - Optimized Route



Distance: ~ 581 km

Time: ~ 9 hours

Base location
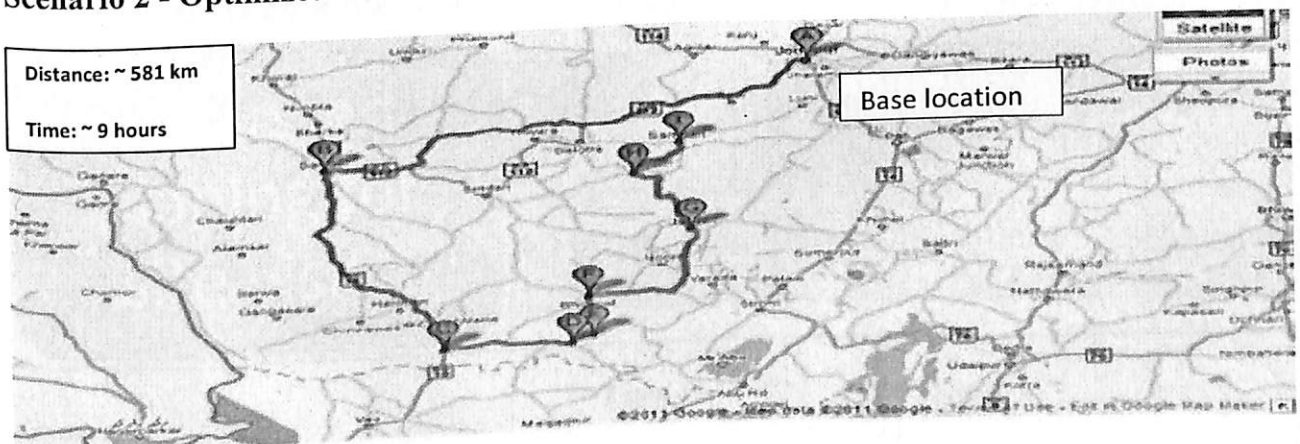
Figure 2.3

In optimized route SOs travel in a circuitous path covering all nearby outlets during visits. This strategy helped the SOs in time management and avoided overlapping of the routes.

Thus, Quarterly Planning Aid (QPA) aims at helping the sales officer's plan & prioritizes better with focus on core, value added activities.

**Benefits of Quarterly Planning Aid**

| Area of Improvement | Expected Benefits of Productivity Process & Toolkit |
| --- | --- |
| Better prioritization | • Prioritization of SO activities based on the profile of the concerned retail outlet<br>• Time spent on non-core activities can be reduced |
| Growth Focus | • Helps focus on outlets with high growth potential, sustain volumes at other outlets and minimizing time spent at low volume outlets<br>• This focus can help improve throughput across regions |
| Focussed planing for site visits | • Collaborative planning process can help optimize travel routes and thereby reduce travel distance & time<br>• Potential to reduce travel times by ~30% |

Figure 2.4

# Process of Quarterly Planning using the Quarterly Planning Aid

| Quarterly (one time) | | | Monthly(thrice) |
|---|---|---|---|
| **OUTLET CATEGORIZATION** | **PREPARING QUATERLY PLAN** | **UPLOADING QUATERLY PLAN ON PORTAL** | **MONTHLY REVIEW AND UPLOAD** |
|  |  |  |  |
| RM & SO to identify volume potential for all outlets | RM & SO to prepare site-wise activity/ visit plan for the quarter using the Quarterly planning aid | SO to upload the quarterly plan on the QPA portal by 15th of the first month of the quarter (e.g. 15th of April for Q1) | At the end of each month, RM and SO to review the actuals against the plan |
| RM and SO to use Outlet Classification Aid for outletCategorization :<br><br>– Growth<br><br>– Sustain<br><br>– Manage | On-site activities to be prioritized based oncategorization & a broadquarterly plan to be created | Step-wise instructions onuploading the quarterly planhave been provided in the instruction manual | Deviations to be studiedjointly & appropriate actionsto be taken for future<br><br>Quarterly planning templateto be updated on the portalby end of the month |

Figure 2.5

For using quarterly planning aid, a step by step quarterly planning process is followed:

Outlet Classification Aid (OCA) using Quarterly Planning Aid, then process of uploading quarterly plan on Retail Collaboration portal and finally monthly review & analysis of actuals visà-vis the plan is done. Quarterly Planning process starts from outlet categorization which assists the sales officer to prioritize outlets into Growth, Sustain and Manage category by identifying the untapped potential at each outlet. Once outlets are categorized, Sales officer plans his activities for the quarter in consultation with the Regional Manager. The finalized plan is then uploaded on the on-line QPA portal which checks for data consistency and accuracy. This process for the Quarterly Planning needs to be followed for each quarter.

Steps to be followed are as follows:

**A. Outlet Categorization**

**B. Preparing Quarterly Plan**

**C. Uploading Quarterly Plan on Portal**

**D. Monthly Review & Upload**

## Step 1: OUTLET CATEGORIZATION

As a first step, the Outlet Classification Aid must be used by the RM and the Sales Officer. In this SOs and RM identify the untapped potential for all outlets and classify these outlets into Growth, Sustain and Manage.This aid helps to categorize the outlets based on the existing volume and the potential available at each site.

Outlet Classification aid categorizes all the outlets of a given sales area based on volume and potential. Volume (past) can be sourced from the MIS application while the Potential needs to be fed into this aid based on the best judgment of the sales officer and the Regional Manager. Sales officer can also take help of NP tool for reference.NP tool captures geography of that area consisting of number of outlets, sales, traffic flow etc. and gives directional potential of their outlet.

All outlets of a sales area are classified into 3 categories with a specific focus area – **Growth, Sustain and Manage.**

Categorization of the Retail outlets can be shown with the help of a matrix comprising of two parameters i.e. Volume and Potential respectively.

## Categorization of Retail outlets

### Three Types of Outlets

Potential

Volume Gap

|  | | |
|---|---|---|
| HIGH | GROWTH | GROWTH |
| LOW | MANAGE | SUSTAIN |
|  | LOW | HIGH |

Figure 2.6

### Volume Base of the Outlet
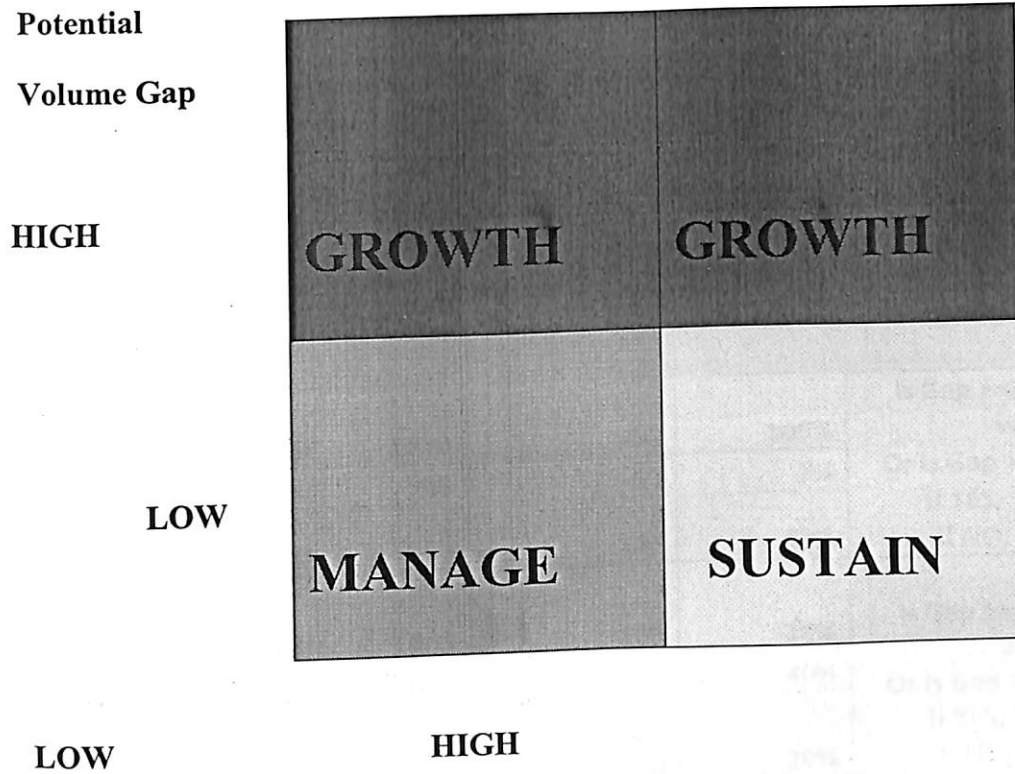
**Growth outlets:** High volume outlets with strong growth potential or lower volume outlets with very high growth potential. In these outlets primary focus is on increasing the volumes at these outlets.

**Sustain outlets:** Moderate to High volume outlets with limited growth potential. In these outlets primary focus on maintaining the volumes at these outlets.

**Manage outlets:** Low volume outlets with limited growth potential. In these outlets primary focus to limiting time spent on these outlets.

Illustration: Outlet categorization

## Categorization of 10 Sample outlets in a Sales Area
### (3 Categories - Growth, sustain and Manage

Table 2.1

| Outlet Name | Monthly Volume | Potential | Gap= Potential-Monthly volume | Potential Gap % | Check | Categorization |
|---|---|---|---|---|---|---|
| Outlet 1 | 900 | 1850 | 950 | 106% | Is Gap >=20% of Hist. vol.? Or Is Gap >=100 KLPM? If YES, "Growth" If NO, "Sustain | Growth |
| Outlet 2 | 750 | 800 | 50 | 7% | | Sustain |
| Outlet 3 | 600 | 800 | 200 | 33% | | Growth |
| Outlet 4 | 500 | 600 | 100 | 18% | Is Gap >=40% of Hist. vol.? Or Is Gap >=100 KLPM? If YES, "Growth" If NO, "Sustain | Sustain |
| Outlet 5 | 500 | 650 | 150 | 40% | | Growth |
| Outlet 6 | 400 | 490 | 90 | 20% | | Sustain |
| Outlet 7 | 350 | 435 | 85 | - | | Manage |
| Outlet 8 | 200 | 275 | 75 | - | | Manage |
| Outlet 9 | 100 | 130 | 30 | - | Is Gap >=100 KLPM? If YES, "Growth" If NO, "Manage" | Manage |
| Outlet 10 | 10 | 310 | 300 | - | | Sustain |
| TOTAL | 4310 | 6340 | 2060 | | | |

A Category: ~50%of total volume

B Category: ~30%of total volume

C Category: ~20%of total volume

**Step 2:** <u>PREPARING QUARTERLY PLAN</u>

After categorization of the outlets using the aid, the RM and the Sales officer are required to jointly plan activities for the quarter.RM & SO prepare site-wise activity/ visit plan for the quarter using the Quarterly planning aid. On-site activities are prioritized based on categorization & a broad quarterly plan needs to be created.

A Quarterly Planning Aid template would be used for activity planning at all the Growth, sustain and Manage outlets.The template has been uploaded on the retail collaboration portal – which is shared with all sales officersby HQO. The RM and Sales Officer need to jointly plan the quarter using this template. Activities are planned in accordance to outlet type viz. growth, sustain and manage. This single template can be used for planning all the 4 quarters of FY13 – 14.

Outlet-specific activities been pre-defined for each outlet category and have been provided in the template.

A particular week needs to be assigned against each outlet in the template to complete required activities.Additionally, some time-consuming activities are also a part of template to ensure they are accounted for, making the plan realistic.

**Step 3:** <u>UPLOADING QUARTERLY PLAN ON QPA PORTAL</u>

The next step is to upload the quarterly plan .SO should upload the quarterly plan on the QPA portal by 15th of the first month of the quarter (e.g. 15th of April for Q1). Step-wise instructions on uploading the quarterly plan have been provided in the instruction manual.

A simple 5 step approach has been defined to upload the QPA sheet on the QPA portal:

> **Login to myhpcl.co.in**

> **Go to QPA page and click on "Upload QPA Planning Sheet"**

> **Select respective Sales Area**

> **Select the year & quarter and upload file**

> **Upload Successful…**

> **…if upload Fails**

**Step 4:** <u>MONTHLY REVIEW AND UPLOAD</u>

At the end of each month, Regional manager and Sales Officer review the actuals against the plan. Deviations are studied jointly & appropriate actions are taken for future. Quarterly planning template to be updated on the portal by end of the month.The actuals are compared against the targeted plan and the deviations must be discussed & analyzed to minimize it for future.

The SO and RM to review the plan for the month and measure the adherence level. Three entries possible against each planned activity:

– Completed

– Partially Completed

– Not Completed

Post Review with the RM at the end of each month, the updated template must be uploaded on the Portal for monitoring at zone.At the end of each month, the Sales Officer would upload the updated template on the portal, with filename as per nomenclature.

Table 2.2

| Month | When to upload | Additions to the updated template each month |
|-------|----------------|----------------------------------------------|
| 0     | 15th Apr-2013  | **Q1 Plan** |
| 1     | 07th May-2013  | Actuals up to Month 1 |
| 2     | 07thJun-2013   | Actuals up to Month 2 |
| 3a    | 07thJuly-2013  | Actuals up to Month 3 |
| 3b    | 15thJuly-2013  | **Q2 Plan** |
| 4     | 07thAug-2013   | Actuals up to Month 4 |
| 5     | 07th Sept-2013 | Actuals up to Month 5 |
| 6a    | 07thOct-2013   | Actuals up to Month 6 |
| 6b    | 15thOct-2013   | **Q3 Plan** |
| 7     | 07thNov-2013   | Actuals up to Month 7 |
| 8     | 07thDec-2013   | Actuals up to Month 8 |
| 9a    | 07thJan-2014   | Actuals up to Month 9 |
| 9b    | 15thJan-2014   | **Q4 Plan** |
| 10    | 07thFeb-2014   | Actuals up to Month 10 |
| 11    | 07thMar-2014   | Actuals up to Month 11 |
| 12    | 07thApr-2014   | Actuals up to Month 12 |

Fig: **File Name Nomenclature for Uploading the Quarterly Planning Aid Template**

All RMs to create the quarterly plan for FY 13-14 Q1 with the respective sales areas and upload it on the QPA Portal by 15th April, 2013.At the end of each month, the monitoring sheet of all sales officers would be reviewed by the RM and then the officer to upload the sheet on the QPA portal before 7th of next month (e.g. deadline for April monitoring sheet upload is May 07th).

# QUARTERLY PLANING AID FOR SALES OFFICER

A step-by-step brief on the quarterly planning process using the Quarterly planning Aid.

Step-wise instructions :

- ✓ Using Outlet Classification Aid
- ✓ Using Quarterly Planning Aid
- ✓ Process of uploading quarterly plan on Retail Collaboration portal
- ✓ Monthly review & analysis of actuals vis-à-vis the plan

I. **Outlet Categorization**

**Outlet Classification Aid on Retail Collaboration Portal:**
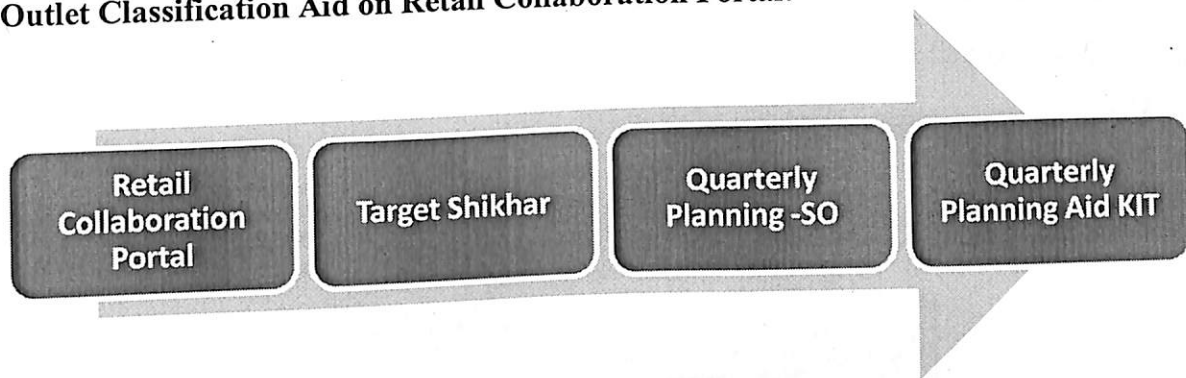


Figure 2.7

1. Open the excel file "**SO_Outlet Classification Aid_Vf**"to be downloaded from Retail Collaboration Portal Target Shikhar → Quarterly Planning –SO→ Quarterly Planning Aid KIT

- This file has 12 tabs
- The Assumptions Tab shows the relevant assumptions that have been used to define the criteria for outlet classification

The outlets are first categorized into A, B and C categories based on volume and then mapped to Growth, Sustain and Manage categories based on the assumptions as mentioned

Illustration:

## Sales Area Details

| | |
|---|---|
| Quarter being Planned | FY12-13 Q1 |

### Sales Officer Information

| | |
|---|---|
| Name of Sales Officer | Mr Sales Officer |
| Name of Regional Manager | Mr Regional Manager |

### Sales Area Information

| | |
|---|---|
| Name of Zone | WZ |
| Name of Region | VASHI Retail RO |
| Name of Sales Area | Thane – A Retail S.A. |

Step1:
Add Outlets

Step 2:
Go To Outlet Details

Figure 2.8

Go to the tab 'Sales Area Details'

2. Select the quarter being planned from the drop down menu (e.g. FY13-14 Q1)
3. Enter the Name of the Sales Officer and the RM in the yellow cells
4. Select your respective zone, region and Sales Area from the drop down menus
5. Click on "Step 1: Add outlets"
6. Click on "Step 2: Go To Outlet Details"

You would be automatically directed to the tab 'outlet details'

All the outlets in the sales area as selected would get populated in the columns B & C

7. in case, any outlet is missed out and needs to be added (newly commissioned or otherwise), please add that at the bottom of the list

Now, by Default the dummy values 100 and 10000 would appear for historic volumes and outlet potential respectively (in columns C & D)

8. Populate the column D against each outlet with the actual historic volumes for quarter (in KLPM)

9. Populate the column E against each outlet with the potential volumes for the quarter being planned (in KLPM). This must be done collaboratively by the RM and the sales officer

[You can use the potential given by the NP Tool only as a reference]

In case you are copying the values from a different excel and pasting in columns C & D, please ensure that you 'paste as values'

10. Click on "Step 4: "Rank Outlets"

11. Click on "Step 5: "Distribute Outlets"

12. Go to the tab 'Output-Categorization'

   ✓ All the outlets have now been categorized into 3 categories viz. Growth, Sustain and Manage
   ✓ The activities and focus areas for each of the 3 categories have been mentioned on this page
   ✓ The RM & the Sales Officer can go through this jointly and discuss the same

13. Go to the tab 'Output-Charts'

   Based on the classification, different charts have been populated that collectively provide a brief analysis of the sales area based on outlet volume and outlet potential

14. Go to the tab 'Output- Cat. 1 Outlet's

   ✓ This tab shows all the Growth outlets in your Sales Area along with the relevant output chart

15. Go to the tab '**Output- Cat. 2 Outlets**
    ✓ This tab shows all the sustain outlets in your Sales Area along with the relevant output chart

16. Go to the tab '**Output- Cat. 3 Outlets'**

    ✓ This tab shows all the Manage outlets in your Sales Area along with the relevant output chart

17. Go to the tab '**For Planning Template'**

This tab shows a list of all outlets in a table with the following 3 columns

- Customer Code
- Outlet Name
- Category

## II. Preparing Quarterly Plan
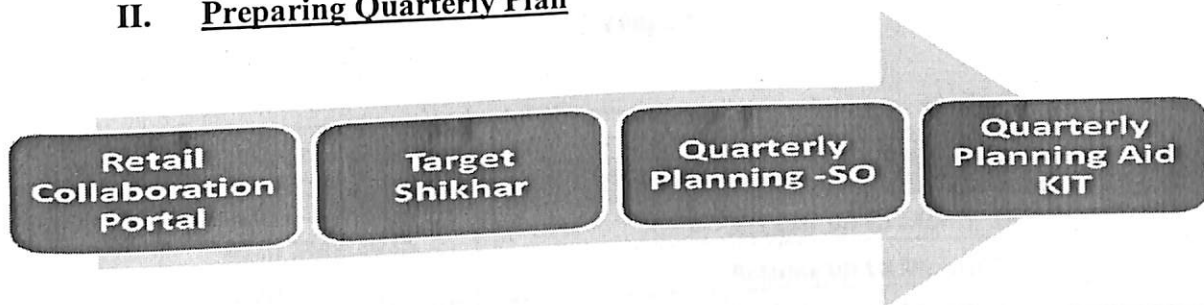


Figure 2.9

Open the excel file "SO_QPA Template_Vf" from Retail Collaboration Portal. This is the template that needs to be used for creating the quarterly plan. This file has the following 18 Tabs : Title&Activities

Following 4 tabs for each quarter:

• FY 13-14 Q1

• Q1 Plan Review

• Q1 SA Profile

• Q1 Adherence

1. Select the Name of your Sales Area

2. Go to the tab '**Activities**': This tab provides the list of activities that must be completed at each outlet category-wise

3. Go to the tab '**FY 13-14 Q1**': This tab provides a template for creating the quarterly plan for the quarter Q1 of the financialYear FY 13 – 14

4. Copy the customer Code, Outlet Name and Category, Historic Volume, Potential from the tab 'For Planning Template' of the Quarterly Planning Aid and paste it AS VALUES in the cells marked in yellow

5. Against Each outlet, the RM and SO must fill the G, H, I and J columns. Against each outlet, the RM & SO jointly must allocate the planned week(s) of 1st, 2nd & 3$^{rd}$ visit to complete the relevant set of activities.Once the plan is created, it needs to be uploaded on the QPA portal.Sales officers are to ensure that the deadlines to upload the QPA are strictly adhered.Automatic email alerts on non-submission will be sent to respective supervisors (RM / Zonal Heads) depending on nature of issue.

**Table 2.3**

| Month | When to upload | Additions to the updated template each month |
|---|---|---|
| 0 | 15th Apr-2013 | Q1 Plan |
| 1 | 07th May-2013 | Actuals up to Month 1 |
| 2 | 07thJun-2013 | Actuals up to Month 2 |
| 3a | 07thJuly-2013 | Actuals up to Month 3 |
| 3b | 15thJuly-2013 | Q2 Plan |
| 4 | 07thAug-2013 | Actuals up to Month 4 |
| 5 | 07th Sept-2013 | Actuals up to Month 5 |
| 6a | 07thOct-2013 | Actuals up to Month 6 |
| 6b | 15thOct-2013 | Q3 Plan |
| 7 | 07thNov-2013 | Actuals up to Month 7 |
| 8 | 07thDec-2013 | Actuals up to Month 8 |
| 9a | 07thJan-2014 | Actuals up to Month 9 |
| 9b | 15thJan-2014 | Q4 Plan |
| 10 | 07thFeb-2014 | Actuals up to Month 10 |
| 11 | 07thMar-2014 | Actuals up to Month 11 |
| 12 | 07thApr-2014 | Actuals up to Month 12 |

File Name:  Nomenclature for Uploading the Quarterly Planning Aid Template

## III.   Uploading Quarterly Plan on Portal

1. Login to my.hpcl.co.in and click on the QPA link

2. Go to QPA page and click on "Upload QPA Planning Sheet"

3. Select respective Sales Area

4. Select the year & quarter and upload file

5. Upload Successful…

…if upload Fails, check error message and refer troubleshooting section for more details

## IV.   Monthly Review & Upload

Post review with the RM at the end of each month, the updated template must be uploaded on the Portal for monitoring. At the End of Each month, the RM & SO must jointly discuss the actuals and the deviations from the plan.

The reasons for high deviations must be discussed to ensure minimum deviation in the future

After the review, the plan (now updated with actuals) should be uploaded on the QPA portal – under the QPA monthly monitoring link.

The SO and RM review the plan for the month and measure the adherence level. Three entries possible against each planned activity: Completed, Partially completed and not completed

# Quarterly Planning Aid for Marketing Officer

Quarterly Planning Aid has been developed for marketing officer for preplanning of various activities for each month. This tool helps a marketing officer/Key account manager to plan all the activities for the quarter in weekly basis.

Marketing officer has to perform two key activities, which are classified as:

- ✓ Field activities
- ✓ Office activities

The adherence to the plan would be measured each month by the Regional manager (RM) and the officer jointly. The deviations and the reasons for the same would be reviewed by the RM and the necessary steps would be taken to minimize the same going forward. Marketing officer also has the option to add any additional activity to the plan.

For a marketing officer, QPA is a three step process:

- A. Preparing Quarterly Plan
- B. Uploading Quarterly Plan on Portal
- C. Monthly review & Upload

Marketing officer has to manage various accounts of the customers, perform various field activities and even has to bring in new customers.

# Process of Quarterly Planning using the Quarterly Planning Aid

**PREPARING QUARTERLY PLAN**
- RM & MO to prepare activity-wise quarterly plan using the QPA ensuring coverage of all quarterly targets

**UPLOADING QuARTERLY PLAN ON PORTAL**
- MO to upload the quarterly plan on the retail collaboration portal at least one week before quarter starts

**MONTHLY REVIEW AND UPLOAD**
- At the end of each month, RM and MO to review actuals against the plan
- Deviations to be studied jointly & appropriate actions to be taken for future
- Quarterly planning template to be updated on the portal by end of each month as per file-name nomenclature

Figure 2.10

a) **Preparing Quarterly Plan** (Quarterly-one time)
b) **Uploading Quarterly Plan on Portal** (Quarterly-one time)
c) **Monthly review & Upload** (Monthly-three times)

## A. PREPARING QUARTERLY PLAN

Firstly you have to download instruction manual for the marketing officer from the retail collaboration Portal.

**1. Open the excel file "MO_Quarterly Planning Aid"**

This is the template that needs to be used for creating the quarterly plan.

**2. Select Zone & Region from the 'Title' Tab**

This file has the following 3 Tabs for each quarter:

- FY 12-13 Q1
- Q1 Review
- Q1 Adherence

**3. Go to the tab 'Accounts'**

This tab provides all the Tier I & Tier II accounts along with recommended prioritization based on:

- Spending Pattern (Quarterly)
- Percentage of Cards Active

Using the recommended prioritization as a reference, the MO/KAM needs to assign the priority based on his/ her own judgement for all accounts in his region.

Go to the tab 'FY 12-13 Q1'. This tab provides a template for creating quarterly plan for Q1 of the financial year FY 12-13.

The activities have been divided into 2 categories:

- F: **Field activities**
- O: **Office / Other Activities**

**4. Feel free to add additional activities if any.**

Against each activity, the user can assign week(s), thereby allocating time in that / those week(s) for this activity

**5. Select "Yes" from the 'plan' column of each week**

In order to plan the activity in a particular week

**6. You can add the location of visit in the column**

'Visit to'

**7. You can add remarks in the column 'Remarks**

In the tab 'Q1 Review' one can see the snapshot calendar view of the quarter with the planned activities in each week shown in green color. This can be constantly referred to; both while planning and while reviewing to ensure a well distributed activity-plan throughout the quarter.

### B. UPLOADING QUATERLY PLAN IN PORTAL

At the end of every month, Marketing Officer should upload the updated template on the portal, with filename as per nomenclature.

Table 2.4

| Month | When to upload | Additions to the updated template each month | File name | |
|---|---|---|---|---|
| | | | Nomenclature | Example |
| 0 Mar'12 end | | Q1 Plan | Month#_Region.xlsx | 0_Vashi.xls |
| 1 Apr'12 end | | Actuals up to Month 1 | Month#_Region.xlsx | 1_Vashi.xls |
| 2 May'12 end | | Actuals up to Month 2 | Month#_Region.xlsx | 2_Vashi.xls |
| 3 June'12 end | | Actuals up to month 3 Q2 Plan | Month#_Region.xlsx | 3_Vashi.xls |
| 4 July'12 end | | Actuals up to Month 4 | Month#_Region.xlsx | 4_Vashi.xls |
| 5 Aug'12 end | | Actuals up to Month 5 | Month#_Region.xlsx | 5_Vashi.xls |
| 6 Sep'12 end | | Actulas up to Month 6 Q3 Plan | Month#_Region.xlsx | 6_Vashi.xls |
| 7 Oct'12 end | | Actuals up to Month 7 | Month#_Region.xlsx | 7_Vashi.xls |
| 8 Nov'12 end | | Actuals up to month 8 | Month#_Region.xlsx | 8_Vashi.xls |
| 9 Dec'12 end | | Actuals up to Month 9 Q4 Plan | Month#_Region.xlsx | 9_Vashi.xls |
| 10 Jan'12 end | | Actuals up to Month 10 | Month#_Region.xlsx | 10_Vashi.xls |
| 11 Feb'12 end | | Actuals up to Month 11 | Month#_Region.xlsx | 11_Vashi.xls |
| 12 Mar'12 end | | Actuals up to Month 12 | Month#_Region.xlsx | 12_Vashi.xls |

Plan for next quarter to be created

1. Go to **my.hpcl.co.in**

2. **Open the Retail SBU Department Site** by selecting from the drop down menu

3. **Rename the File as 0_Region** before uploading the plan (as per file naming nomenclature)

4. Enter the Folder "**MO - QUARTERLY PLANS**"

5. Enter the folder respective to your zone

6. Select **Upload Document** and click on 'upload document'

7. Browse and select the file that needs to be uploaded and upload the same.

## C. MONTHLY REVIEW AND UPLOAD

At the End of Each month, the RM & MO must jointly discuss the actuals and the deviations from the plan. The reasons for high deviations must be discussed to ensure minimum deviation in the future

In the tab 'Q1 Adherence' one can see the overall % Adherence on a monthly basis, based on the actuals fed-in in the tab 'FY12-13 Q1' each month.

After the review, the plan (now updated with actuals) should be renamed with a new filename as per the nomenclature. Upload the plan on the Retail collaboration Portal by following the steps shown earlier.

# Benefits of QPA Tool

**SALES OFFICER:**

- Understanding *Actual Potential* available within existing retail network
- Growth-Sustain-Manage (G-S-M )Categorization helps focusing on key outlets to realize potential gap
- Prioritization of activities based on outlet categorization
- Focused planning of site visits – thus reducing travel time

**MARKETING OFFICER:**

- Understanding key customers (Tier 1/2) in the Region
- Focus on establishing and nurturing relationships with key customers
- Planned customer / solicitation visits to reduce travel time
- Prioritization of activities: more effort spent on core activities

**HQO/ZONAL MONITORING TEAMS:**

- Real-time monitoring of submission levels across Regions / Zones
- Monitoring Adherence level for corrective action
- Auto alerts to Heads for non-submission of QPA/Monitoring
- Consolidated list of outlets with G-S-M Categorization & Potential

## <u>OBJECTIVESOF THE STUDY</u>

- To study the strategic initiatives to enhance field force efficiency.
- To analyze the effectiveness of Quarterly planning Aid (QPA) among sales and marketing officer.
- To identify drawbacks of QPA and further restructure it

# RESEARCH METHODOLOGY

## COLLECTION OF DATA:

### 1) SECONDARY DATA

My step to meet my research objectives was to collect secondary data. Both internal and external data is collected.

Information will be collected from secondary sources which covers the scope of the study which is limited to identify the efficiency of QPA tool for the SO's and MO's officers.Information has been extracted includes sources from:

➢ Surfing internet
➢ Articles
➢ Annual reports
➢ Journals

### 2) PRIMARY DATA

Primary data was collected both qualitatively and quantitatively through telephonic interview of Sales officer and Marketing officers.

*The type of research is: DESCRIPTIVE RESEARCH DESIGN*

### SAMPLING

A sample size of 100 Sales and marketing officers who are sales officer and marketing officers in HPCL.

### SAMPLING TECHNIQUE

*Probability sampling technique.*

➢ *Random Sampling*

### SAMPLE SIZE

100 (55 sales officers and 45 marketing officers)

# TESTING OF HYPOTHESIS

## HYPOTHESIS

**Ho:** QPA is Successful for SO's and MO's in Time management. It should not be restructured.

**Ha:** QPA is not successful for SO's and MO's in Time management. Hence, it should be restructured.

## DATA ANALYSIS

After collecting information from telephonic interview, Chi-square test to analyze the data to accept or reject the Hypothesis. Conclusions and recommendations are made on the basis of information collected and result obtained.

|  | Sales officer | Marketing officer | Total |
|---|---|---|---|
| **Successful** | 20 | 30 | 50 |
| **Not Successful** | 35 | 15 | 50 |
| **Total** | 55 | 45 | 100 |

To test the above Hypothesis we perform the Chi square test (as a non- parametric test): (level of significance= 5%)

*Expected frequency:*.(Row total for the row of that cell) x (Colum total for

The column of that cell)

$$\overline{\text{(Grand total)}}$$

**Expected Frequencies calculate are:**

|  | Sales officer | Marketing officer | Total |
|---|---|---|---|
|  |  |  |  |
| Successful | 27.5 | 22.5 | 50 |
| Not Successful | 27.5 | 22.5 | 50 |
| Total | 55 | 45 | 100 |

## CALCULATION OF CHI- SQUARE

| S.no | Observed frequency(O) | Expected frequency(E) | O- E | (O-E)^2 | (O-E)^2/ E |
|---|---|---|---|---|---|
| 1 | 20 | 27.5 | -7.5 | 56.25 | 2.812 |
| 2 | 30 | 22.5 | 7.5 | 56.25 | 1.875 |
| 3 | 35 | 27.5 | 7.5 | 56.25 | 1.607 |
| 4 | 15 | 22.5 | -7.5 | 56.25 | 3.75 |

Chi- square= $\sum \dfrac{(O-E)^2}{E}$

= 10.04

Degree Of Freedom = (r-1) (c-1)

= (2-1) (2-1)

= 1

The table value of chi square for degree of freedom at 5 % level of significance is 3.841. The calculated value is higher than the table value and hence the results do not support the null hypothesis.

Hence we ACCEPT theALTERNATE HYPOTHESIS.QPA should be restructured.

# FINDINGS & DATA ANALYSIS

1. Do you think that QPA tool is beneficial to manage various sales areas?



4%

24%

72%

- Yes
- No
- Can't say
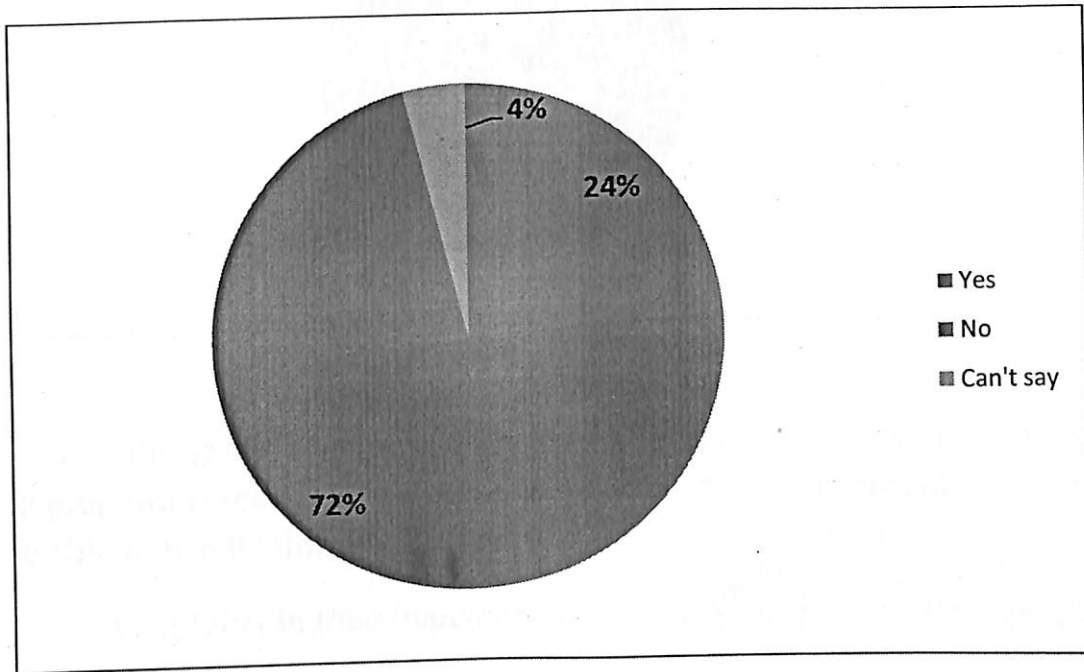
Figure 6.1

Out of sample size 55 employees, thirteen believed that QPA has proved to be successful in managing various sales areas which accounts for 72%. While forty SO's think it is not beneficial due to some uncertainties. And remaining two SO's were not sure whether QPA has turned out to be helpful.

2. Do you think a special training program is required for handling QPA?

✓ YES
✓ NO
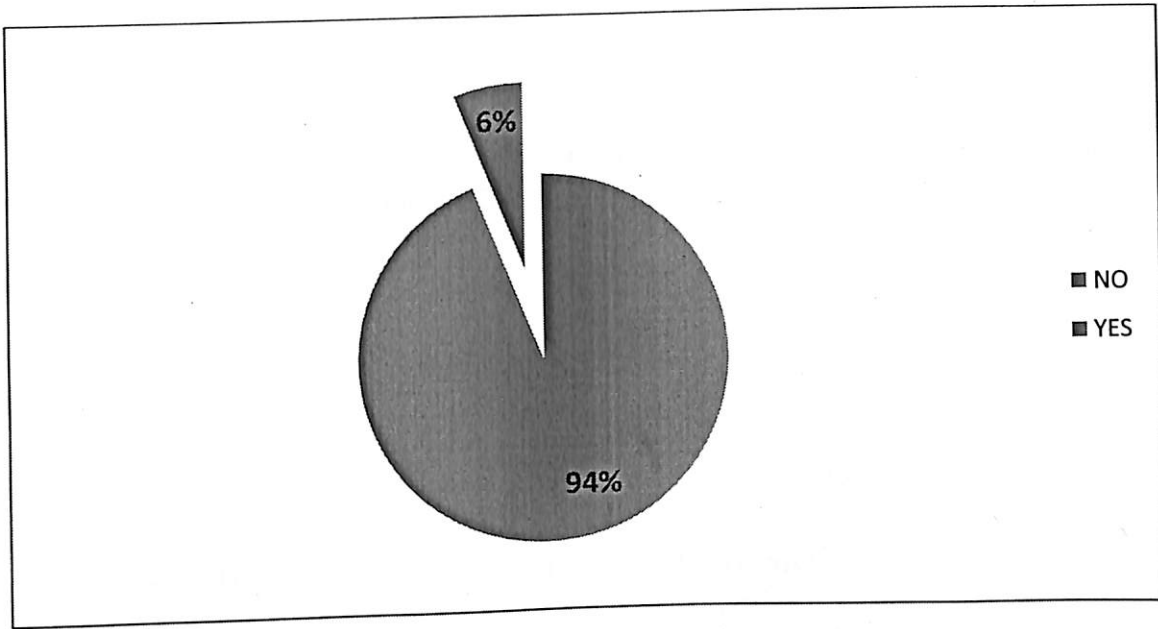
Figure 6.2

According to this graph it is clear, 94% of SO's and MO's believed that no special training program is required as already instruction manual is provided to them and they are able to handle this tool online.

3. Success of QPA in time management:
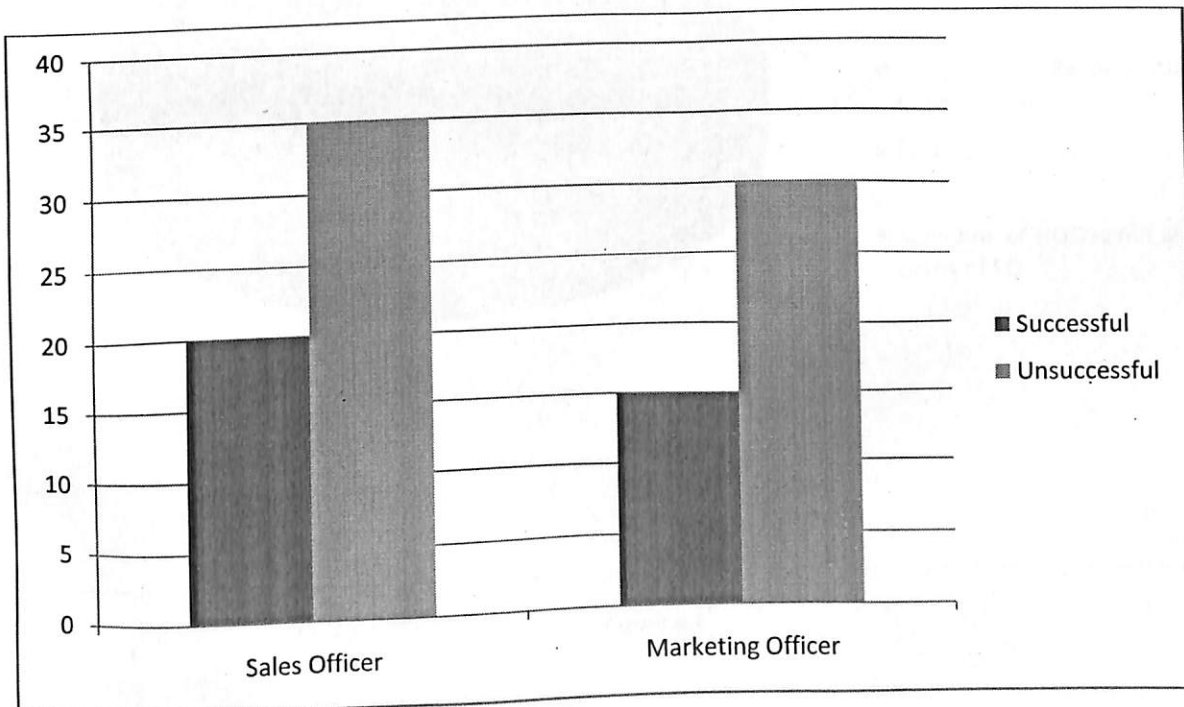


Figure 6.3

From this bar graph it is depicted that from a sample size of 55 SO's, twenty think that it is 36% successful and accordingto remaining thirty five it is 64% unsuccessful. While in a sample of 45 MO's, thirty think that it is 67% successful.

4. Drawbacks of QPA

✓ Difficult to manage it quarterly
✓ Outlet's volume potential taken is hypothetical
✓ Lack of adequate training
✓ Schedule of HQO is not aligned with plans of SO and MO
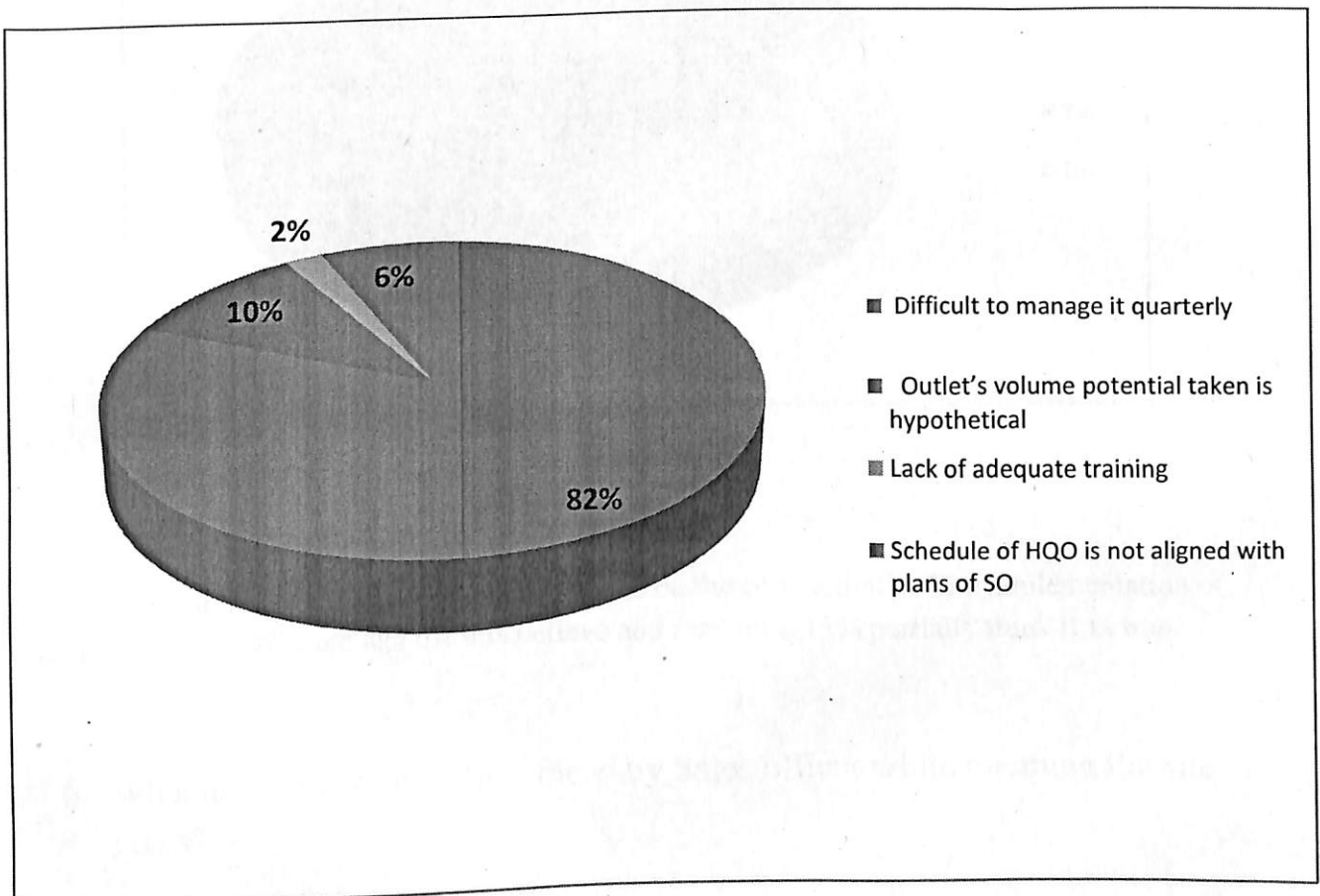


**Figure 6.4**

This pie chart represents various drawbacks of QPA. Eighty twopercent face difficulty in managing this tool quarterly. According to 10 percent the potential calculated for various outlets undertaken by sales officer is hypothetical thus categorization of outlets does not comes out to be real.

2% think that lack of adequate training is of the drawback of QPA and three sales officers agree on the statement that that HQO's schedule is not aligned with theirs.

5. Has implementation of QPA helped to focus on the core activities?
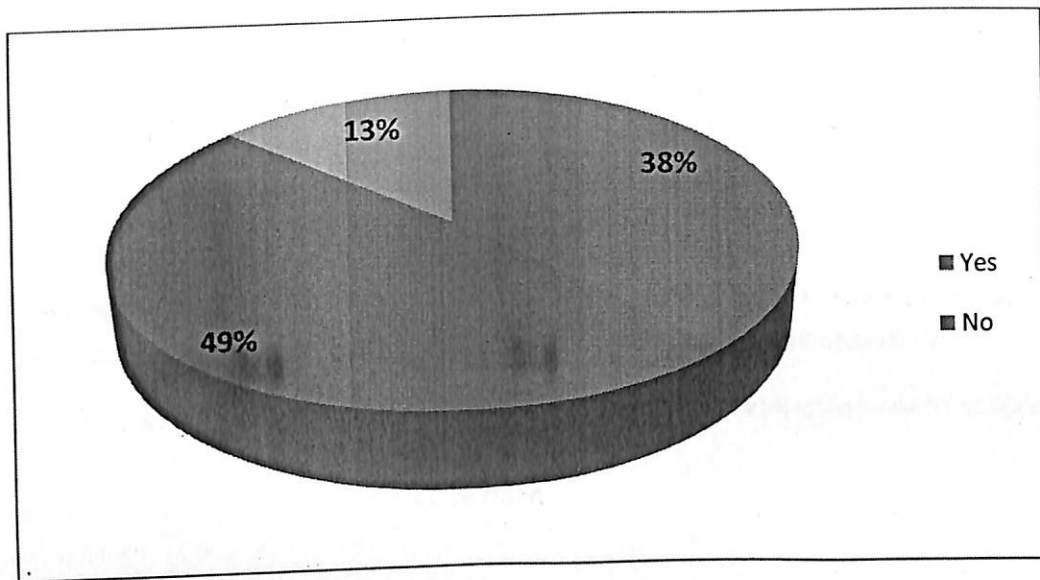


Figure 6.5

38% believes that QPA has helped them to focus on the core activities like implementation of ODMT, SOP etc. 49% are against this believe and remaining13% partially think it as true.

6. What are the various issues faced by Sales officer while planning the site visits?

✓ Variation in requirement of the company and the outlet
✓ Priority issue
✓ No plan to meet with uncertainties
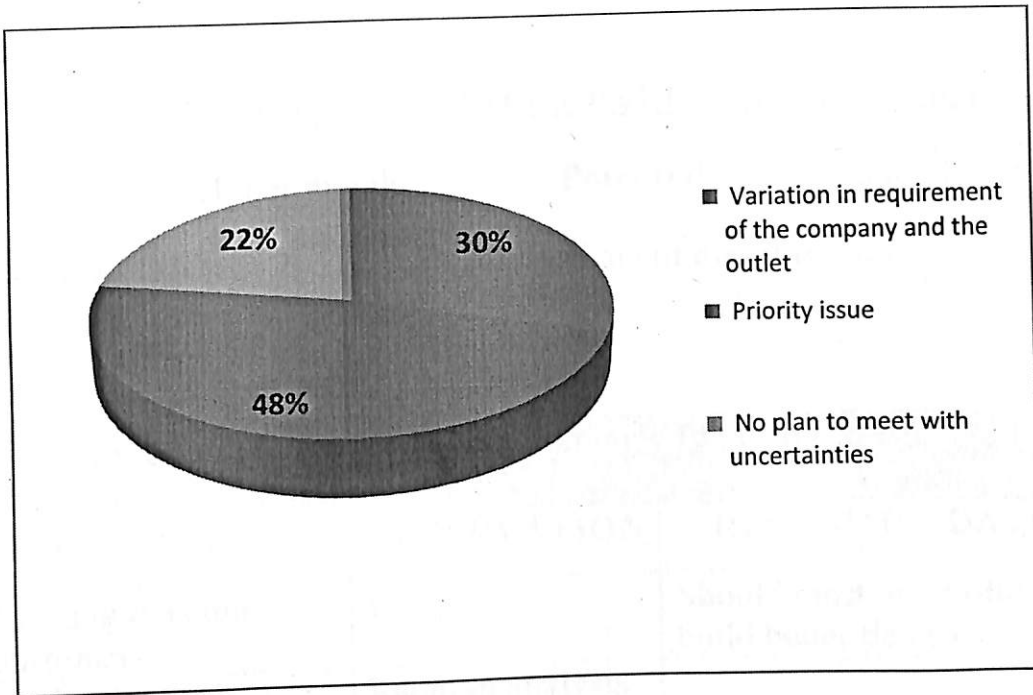
**Figure 6.6**

48% face priority issue while planning site visits. Another 30% have variations in requirement of the company and outlet. And remaining 22% have no plan to meet uncertainties.

7. Do you think there is need to revise QPA tool for further enhancement in sales officer's performance?

73% believed that QPA should be revised
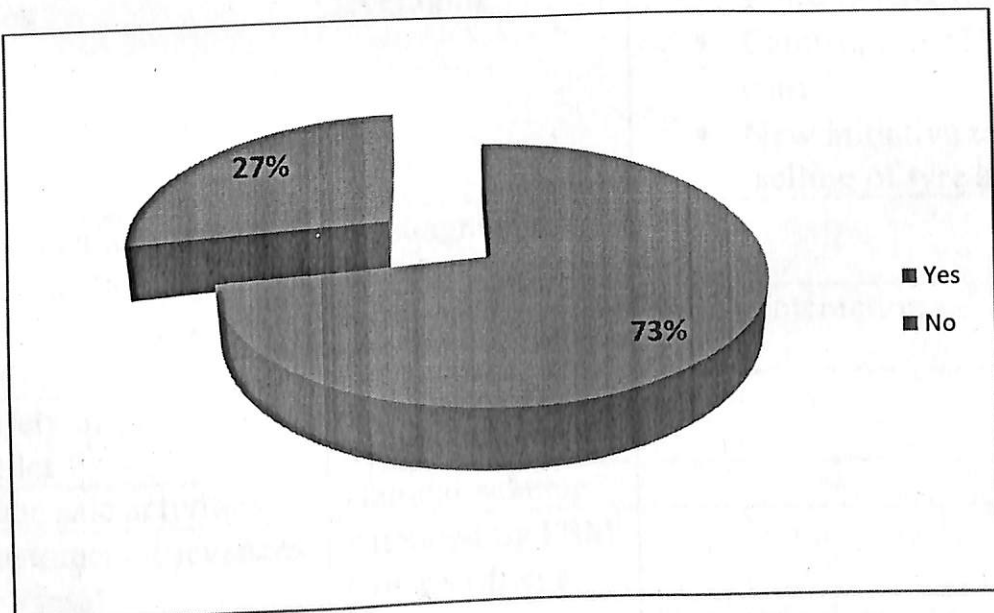


**Figure 6.7**

# AUTOCARE CENTRE VILLE PARLE (West) Mumbai

**Sales volume:** 380 KL per month

**Potential:** From 380 to 388 (increase)

**Enablement of ODMT:** 2011

Sale of diesel is more than Petrol

**Table 6.1**

| Comco Officer - Quarterly Planning | | |
|---|---|---|
| **ACTIVITIES** | **OBSERVATION** | **RECOMMENDATION** |
| 1. Meeting existing customers | Less | Should meet more often to build better tie ups. |
| 2. Evaluation and analysis of competition | Random analysis | - |
| 3. Conducting Q&Q Campaign | Daily basis (3 Shifts) | Parameters to be explained to 2-5 customers daily to gain their confidence |
| 4. Conducting Campaign at outlet to improve sales | Plan to do Automation leveraging | • Lucky draw for customers who get their vehicles tank full.<br>• Campaign for DT plus card<br>• New initiative taken :selling of tyre at MRP |
| 5. Conducting ODMT Diagnostics | Re-diagnostics was done in April | - |
| 6. Meeting at regional office | Every month | Online interaction |
| 7. Safety inspection of outlet | Self and by HQ people | - |
| 8. Lube sale activities | Damdar scheme | - |
| 9. Customers grievances redressal | Attended by FSM /comco officer | - |
| 10.FSM training on SOP and ensuring outlet is | Meetings held with all FSM to | Cue cards should be carried by everyone. |

| SOP complaint | interact and inputs are given to implement SOP | Basic facilities of washroom, drinking water should be there. |
|---|---|---|
| 11. FSM training | Mock drills | Training needs to be identified for the staff. Various training on Safety, emergency drill, firefighting etc. to be conducted. |
| 12. Business solicitation | Contact 2 customerseverday as per QPA | – |
| 13. Implementation of M&R for all equipment's including DU | Done by Vendor | – |
| 14. Joint inspection of ARB activities with ARB partners | ATM, Postal service | No other ARB facilities due to legal issues |
| 15. Completion of all ODMT initiatives | Less initiatives taken by outlet | – |
| 16. Conducting competition analysis and preparing intelligence report | Intelligence report not prepared | Should have links and on regular basis meetings should be done with competitors to keep a check on his business strategies. |
| 17. Self-training | Online modules, training programs, conferences | = |
| 18. Conduct transporters meet | Account holders:5 | Try increasing tie ups by advertising, selling DT+ cards, promise of insurance |
| 19. Leave/vacation | Informed beforehand | – |
| 20. Outlet inspection | Third party audit | |
| 21. Sampling | Power -4<br>Turbo-4<br>Of last two loads as per MDG | – |

# AUTOCARE CENTRE BORIVALI (East) Mumbai (DOCO)

**Sales volume:** 1400KL (average)

**Potential:** 2000 KL

**ODMT implemented:** 2012

Sale of petrol is more than that of diesel. Highest selling outlet in Mumbai.

Table 6.2

| Comco Officer | | |
|---|---|---|
| ACTIVITIES | OBSERVATION | RECOMMENDATION |
| 1. Meeting existing customers | Very less | Should meet more often to build better tie ups. |
| 2. Evaluation and analysis of competition | Periodic | - |
| 3. Conducting Q&Q Campaign | Daily basis (3 Shifts) | Need to draw customer's attention towards Q&Q. Parameters to be explained to 2-5 customers daily to gain their confidence |
| 4. Conducting Campaign at outlet to improve sales | | New initiative : Automatic oil changing machine for two wheelers |
| 5. Conducting ODMT Diagnostics | Re-diagnostic done in April | ODMT diagnostics should also include comparison with other ROs. |
| 6. Meeting at regional office | monthly | Online interaction |
| 7. Safety inspection of outlet | Self | Should conduct once in a year third party audit |
| 8. Lube sale activities | Damdar campaign | |
| 9. Customers grievances redressal | Addressed by FSM | - |
| 10. FSM training on SOP and ensuring | Cue cards were not carried by the | Cue cards should be carried by everyone. |

| | | |
|---|---|---|
| outlet is SOP complaint | employees. | Basic facilities of washroom ,drinking water should be there |
| 11.FSM training | Given on regular basis. | Improve their behavioral and hospitality characteristics. More manpower is required to manage the outlet |
| 12.Business solicitation | Contact 2 customers everyday as per QPA | Obtain feedback from customers and find the improvement areas. |
| 13.Implementation of M&R for all equipment's including DU | Done by vendor | Periodic internal audits to be conducted by COMCO |
| 14.Joint inspection of ARB activities with ARB partners | NO ARB Facilities due to dealer interference | Space is available for ARB activities |
| 15.Completion of all ODMT initiatives | NO | Company should invest more in ODMT initiative in this outlet as it has a lot of potential in sales. |
| 16.Conducting competition analysis and preparing intelligence report | Intelligence report not prepared | Periodic market intelligence reports to be made by COMCO. Keep a track of competitors move. |
| 17.Self-training | Online modules, training programs, conferences | - |
| 18.Conduct transporters meet | Account holders: 70 | Should conduct meetings on regular basis |
| 19.Leave/vacation | Informed beforehand | - |
| 20.Outlet inspection | Third party audit | |
| 21.Sampling | Last two loads Petrol-4 Diesel-2 | - |

# LIMITATIONS OF THE STUDY

- Time constraint
- Some of the employees were unwilling to talk.
- No past research conducted as it was a new tool adopted by company which was introduced in the month of April 2013.

# RECOMMENDATIONS

➤ There is a need to revise QPA tool in order to enhance the performance of the SO's and MO's. From the research it was concluded that most of the officers were facing difficulty in quarterly planning, due to various uncertainties'. Thus, from quarterly planning it should be changed to monthly planning.

After making a quarterly plan for one month the activities are performed to the fullest by SO's but from second month the adherence keep on reducing. Due to various uncertainties and other work/sudden requirement sometimes SO's are not able to stick with the original plan. Thus, Long term planning is not fruitful.it should be made a monthly plan so that SO's are able to perform their schedule in short intervals.

**Framework:**

Table 7.1

| Month | Date | Schedule |
|-------|------|----------|
| Dec | upload M1 | |
| Jan | 1st -25th | Comply with the plan |
| | 25th-26th | upload actuals of M1 and plan for M2 |
| | 27th | Monitoring report check adherence level |
| | 28th-30/31st | Try to complete undone activities of M1 |
| Feb | 1st -25th | Comply with plan |
| | 25th-26th | upload actuals of M2 and plan for M3 |
| | 27th | Monitoring report check adherence level |
| | 28th-29th | Try to complete undone activities of M2 |
| March | 1st-25th | Comply with plan |
| | 25th-26th | upload actuals of M3 and plan for M4 |
| | 27th | Monitoring report check adherence level |
| | 28th-30/31st | Try to complete undone activities of M3 |
| April | 1st-25th | Comply with plan |
| | 25th-26th | upload actuals of M4 and plan for M5 |
| | 27th | Monitoring report check adherence level |
| | 28th-30/31st | Try to complete undone activities of M4 |
| May | 1st-25th | Comply with plan |
| | 25th-26th | upload actuals of M5 and plan for M6 |
| | 27th | Monitoring report check adherence level |
| | 28th-30/31st | Try to complete undone activities of M5 |
| June | 1st-25th | Comply with plan |

| | 25th-26th | upload actuals of M6 and plan for M7 |
|---|---|---|
| | 27th | Monitoring report check adherence level |
| | 28th-30/31st | Try to complete undone activities of M6 |
| **July** | 1st-25th | Comply with plan |
| | 25th-26th | upload actuals of M7 and plan for M8 |
| | 27th | Monitoring report check adherence level |
| | 28th-30/31st | Try to complete undone activities of M7 |
| **Aug** | 1st-25th | Comply with plan |
| | 25th-26th | upload actuals of M8 and plan for M9 |
| | 27th | Monitoring report check adherence level |
| | 28th-30/31st | Try to complete undone activities of M8 |
| **Sept** | 1st-25th | Comply with plan |
| | 25th-26th | upload actuals of M9 and plan for M10 |
| | 27th | Monitoring report check adherence level |
| | 28th-30/31st | Try to complete undone activities of M9 |
| **Oct** | 1st-25th | Comply with plan |
| | 25th-26th | upload actuals of M10 and plan for M11 |
| | 27th | Monitoring report check adherence level |
| | 28th-30/31st | Try to complete undone activities of M10 |
| **Nov** | 1st-25th | Comply with plan |
| | 25th-26th | upload actuals of M11 and plan for M12 |
| | 27th | Monitoring report check adherence level |
| | 28th-30/31st | Try to complete undone activities of M11 |
| **Dec** | 1st-25th | Comply with plan |
| | 25th-26th | upload actuals of M12and plan for M1 |
| | 27th | Monitoring report check adherence level |
| | 28th-30/31st | Try to complete undone activities of M12 |

➢ Less number of outlets should be allotted per SO in order to release pressure. As various activities have to be performed thus if number of outlets will be less, it will be more effective to manage them.

➢ Outlet's volume potential taken is hypothetical. The potential calculated for various outlets undertaken by sales officer is hypothetical thus categorization of outlets does not come out to be real. Use of NP tool should be made mandatory so that exact potential can be calculated.

> Adequate training should be provided to the sales officer and marketing officer on timely basis to enhance their efficiency.

> A central database system should be built comprising of all the tools like: QPA, ODMT, SOP, JDE, Inspection etc.
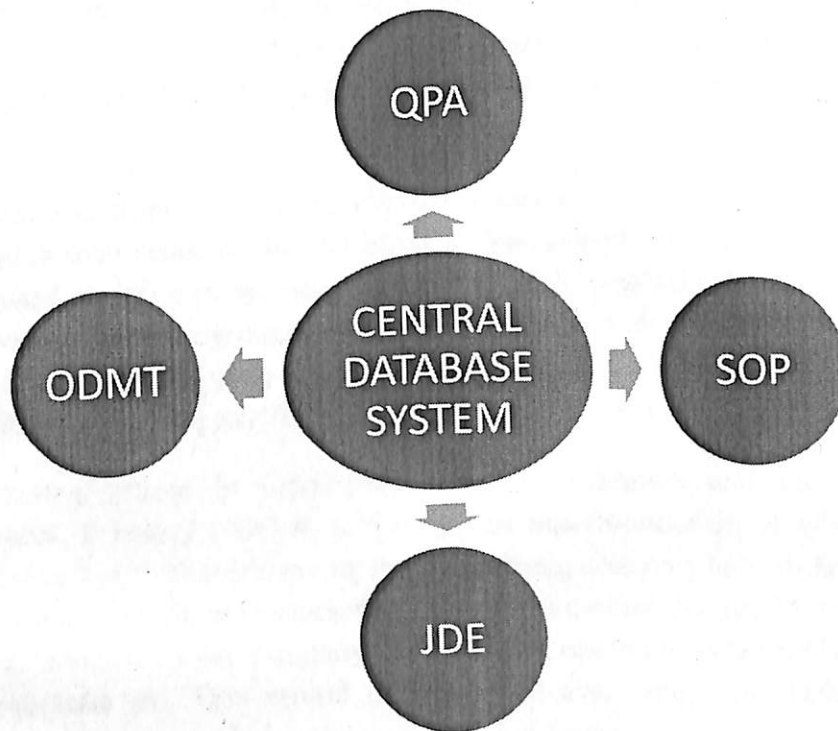


Figure 7.1

SO has to upload its planning schedule in a QPA portal which is a complex and time consuming task. A central database system should be there where there is no need to upload many times, SO can update their schedules and timely monitoring is done. All this info will be available to HQO;with that HQO can get their SO's daily updates regarding the activities performed by them.

# CONCLUSION

This report discussed about retail strategy of HPCL and training tools and processes adopted by them to increase efficiency of their employees. I came to a conclusion that QPA tool should be further restructured in order to increase the sales force efficiency. Various drawbacks like - Difficult to manage it quarterly; Outlet's volume potential taken is hypothetical; Lack of adequate training; Schedule of HQO is not aligned with plans of SO and MO etc. were identified.

QPA should be changed from a quarterly plan to a monthly plan so that officers face no difficulties in planning their schedule and fulfilling it. Because of this tool travel time has been reduced due to focused planning of the site visits by officers. In optimized route SOs travel in a circuitous path covering all nearby outlets during visits. This strategy helped the SOs in time management and avoided overlapping of the routes. Quarterly Planning Aid (QPA) aims at helping the sales officer's plan & prioritizes better with focus on core, value added activities.

QPA helped marketing officer in identifying the key customers and establishing better relationship with them. It helped HQO in achieving real-time monitoring of submission levels across Regions / Zones. For further enhancing the monitoring, company should develop a central repository system where everything is accessible by HQO and other SO and MO's and will also link with other tools adopted by the company like Standard operating system, Outlet diagnostic and monitoring technique etc. This central database will also reduce the task of uploading schedule of officers and thus it will be more ease to use and faster.

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# QUESTIONNAIRE(For sales officer)

**Name:** _____

**Sales area:** _____

**Number of outlets:** _____

**Growth-** _____    **Sustain-** _____ **Manage-** _____

1.) Up to what level QPA tool is beneficial to manage various sales areas?

2.) How many visits per month do you plan for growth, sustain and mange outlets respectively?

3.) To what percent(approx.) QPA has proved to be successful in time management for a sales officer?

4.) Are you able to successfully handle QPA tool online? If not what are the main reasons?

5.) According to you what are the major drawbacks of QPA?

6.) Do you think a special training program is required for handling QPA?

YES[ ]     NO[ ]

7.) Do you think implementation of SOP/ODMT has helped sales force to focus on the core activities?

8.) What are the various issues faced by you while planning the site visits?

9.) What do you consider as an area of improvement except better prioritization, growth focus and focused planning for site visit to enhance the field force efficiency?

10.)     How do you address various deviations faced against the actual plan in order to meet the adherence?

11.)     Do you think there is a need to revise QPA tool for further enhancement in sales officer's performance?

# QUESTIONNAIRE (For marketing officer)

Name: _____

Region: _____

Number of accounts: _____

1.) How do you assign priority to various accounts?

2.) What are the various issues faced while handling accounts?

3.) Are you able to successfully handle QPA tool online? If not what are the main reasons?

4.) Do you think a special training program is required for handling QPA?

YES [  ]      NO [  ]

5.) To what percent (approx.) QPA has proved to be successful in managing various activities?

6.) How do you address various deviations faced against the actual plan in order to meet the target?

7.) Do you think there is a need to revise QPA tool for further enhancement in marketing officer's performance?