

## **PREPARING FOR BOSS VISIT**

### **DO YOUR HOMEWORK DAY'S PLAN**

1. Prepare the day's plan.: days plan includes:
  2. Departure and arrival timings to different places.
  3. Places to be visited.
  4. Points to be discussed.
  5. Special appointments.
  6. Markets to be visited.
  7. Prepare a separate sheet of the day's plan for each day.
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### **TARGET V/S ACHIEVEMENT**

1. Prepare a target v/s achievement update sheet for the particular town in your territory.
  2. Prepare separate sheets for the towns visiting.
  3. Prepare update achievement Vs target.
  4. Compare this year's update achievement with last year's average.
  5. Compare the percentage of time with the percentage of achievement.
  6. Highlight the special achievements
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### **KNOW THE PROFILE**

1. Know the visiting places' profiles. Population, males, and females. Size, area, boundaries. Literacy rates.
  2. Universities, colleges, institutions, other research institutes, etc.
  3. Political structure.
  4. Factories and other industries and crops. Income sources
  5. Historical places
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## **KNOW THE PRICING.**

1. Be clear and prepared.
  2. Know the pack wise Maximum resale price (M.R.P.).
  3. Know the Brand-wise and pack-wise retail price.
  4. Know the invoice prices.
  5. Know the sales tax and other taxes pack-wise.
  6. Know the retailer margin of each pack.
  7. Know the competitor products pricing M.R.P., invoice, retail price, retail margin, etc.
  8. Know the comparison between own and competitor prices, retail margins, sizes, etc.
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## **TARGET SPLITS**

1. Have target splits of each pack, town rise, distributor-wise.
  2. Have the bases for the split.
  3. Have percentage growth of targets over last year.
  4. If possible, have a target split for distributor salesman-wise.
  5. Update achievements also.
  6. Total target split should tally with the territory target.
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## **TERRITORY PROFILES**

1. Keep ready the territory profiles.
  2. Have to visit places distributor's profiles also.
  3. Have remaining distributor profiles for reference.
  4. The distributor profile format is available in the reporting formats chapter.
  5. Keep all the territory and distributor profiles neatly typed or done on the computer.
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## **YOUR ITINERARY**

1. Keep your itinerary ready.
  2. For Any changes in the itinerary, keep ready with reasons.
  3. The itinerary should be prepared by considering the below points.
  4. Covering all the town.
  5. Economical.
  6. No repetitive visits.
  7. Priority base town coverage.
  8. Keep your sub-ordinates itinerary also ready.
  9. Should have a clear idea of your sub-ordinated itinerary, particularly the boss's visiting dates.
  10. Keep ready the contact phone numbers.
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## **Promotional Activities**

1. Should know the peakwise, slab slab-wise promotional activities of a particular month.
  2. Able to tell the last three months' trade promotions and activities.
  3. Should know peakwise average sales with promotions and without promotions in the last three months.
  4. Know the competitor's promotional activities, percentage of scheme, operation period, etc.
  5. If possible, collect the P.O.P. of the competitor's promotional activities.
  6. Know the last three months' competitor's promotional activities.
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## **FINANCIAL BUDGETS**

1. Keep ready the "Financial Budgets" of your territory i.e., displays, Q>P>S> etc.
2. Have the budget split distributor-wise and the period to be used.
3. Have outlet-wise average budget allotted. Update the financial budget usage distributor-wise.

4. Formula to calculate average budget allotted per outlet:: Display the Budget No. of outlets
5. Distributor-wise number of display windows taken and classification and category of outlets.
6. Knowledge of competitors' financial budgets and activities.

## **CHEQUES**

1. Keep ready the distributor cheque position with C & FA/Super-Stockist? Consignee agent and cheque numbers.
  2. Follow the minimum cheque position norms with C & FA.
  3. Prepare distributor-wise cheques to be presented by C & FA, amounts and dates.
  4. Keep cheque bouncing details, demand drafts collected, drafts to be collected, due dates, etc ready.
  5. Genuine reasons for cheque bouncing.
  6. Reasons should tally with the distributor's statements.
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## **OUTSTANDING**

1. Keep ready the cheque bouncing the outstanding list. Do the aging analysis.
  2. Prepare the aging analysis as 15 days, 30 days, 45 days, 60 days, and 90 days.
  3. Prepare genuine reasons for old outstanding. Prepare a plan to collect old outstanding with dates.
  4. What are all the efforts already made to collect the old outstanding?
  5. Compare the percentage of bouncing with sales in the last three months.
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## **Claims**

1. Keep the distributor-wise pending claims list ready.
2. The pending claims list should have the following details:
  - a. Activity. o Claim No. o Amount spent. o Budget allotted. o Date of submission. o Activity month.
  - b. Enclosures etc.

## **PRIMARIES**

1. Keep ready the primaries plan distributors for the particular month.
2. Update primaries made.
3. Pending primary orders with C & FA and dates to be dispatched.
4. The primary plan should tally with the target.
5. Quantities mentioned in primary order form should reflect the promotional packs order.
6. All primary order copies should have the distributor's stamp and signature.

## **SECONDARIES**

1. Keep ready the secondary targets, distributor-wise and distributor salesman-wise, pack-wise.
2. Update the secondaries of all distributors and distributor salesmen.
3. Prepare a plan to achieve the balance of secondary targets distributor, salesman, and pack-wise.
4. Compare the secondary update achievement percentage with the time percentage.
5. See the reporting formats chapter for the secondary follow-up sheet.

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## **STOCK POSITIONS**

1. Keep ready the distributor wise go down stock position.
  2. Ratio of stock positions with primary and secondary targets and achievements.
  3. Prepare answers for huge stock positions if any.
  4. Prepare answers for low stock positions if any.
  5. Prepare answers for out of stock positions also.
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## Competition Information

1. Have the competitor's information in full.
  2. Competitor companies' distributors
  3. Addresses and phone numbers.
  4. Contact person.
  5. Business turnovers, investment.
  6. Coverage and coverage frequency.
  7. Experience.
  8. C & FA town and dispatch frequency.
  9. Company salesman, name, experience etc.
  10. Territory. Particular distributor working days.
  11. Infrastructure available etc. Market credit days.
  12. Financial terms with company, Etc.
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## PRESENTATION

1. Prepare a presentation to submit to the boss. Territory in general, visiting towns in particular.
  2. The presentation should have profiles of personnel, territory, and distributor.
  3. Primaries, secondary targets, and achievements. Coverage analysis. Turnover analysis Callage and productivity.
  4. Promotional activities report. Budget v/s budgetary control.
  5. Contribution of brands/packs and turnover to the territory.
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## BRIEFCASE OR BAG

1. Arrange the files and other records neatly in order, in your briefcase or bag.
2. Should be able to take out the required file easily.
3. Territory map, town map compulsory.

4. Pen, pencil, eraser, marker and calculator.
  5. Keep one empty pad.
  6. Keep some white papers.
  7. Extra pen, pencil and eraser.
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## Expense statement

1. Keep the expense statement file ready.
2. File the expense statements in order.
3. Update all expense statements.
4. Mark the expense drafts/cheques received.
5. Knowledge on expense draft time taken analysis.
6. Imprest cash, expenses and plus or minus balance analysis.
7. Percentage of expenses to sales a comparison.
8. See "reporting formats" for expense analysis format.