

PREPARING FOR BOSS VISIT

» DO YOUR HOME WORK

» DAY'S PLAN

- Prepare days plan.
- Show the boss and get the approval.
- Days plan includes:
 - Departure and arriving timings to different places.
 - Places to be visited.
 - Points to be discussed.
 - Special appointments.
 - Markets to be visited.
- Prepare separate sheet of day's plan for each day.

» TARGET V/S ACHIEVEMENT

- Prepare target v/s achievement update sheet for the particular town.
- Prepare separate sheet for your territory.
- Prepare separate sheets for the towns visiting.
- Compare this year update achievement with this year target.
- Compare this year update achievement with last year average.
- Compare the percentage of time with percentage of achievement.
- Highlight the special achievement with market.
- For the formats and presentation see reporting formats chapter.

» KNOW THE PROFILE

- Know the visiting places profiles.
- Population, males and females.
- Size, area, boundaries.
- Literacy rates.
- Universities, colleges, institutions, other research institutes etc.
- Political structure.
- Factories and other industries and crops.
- Historical places and temples.

» KNOW THE PRICING.

- Be clear and prepare.
- Know the Brand wise and pack wise Maximum resale price (M.R.P.).
- Know the Brand wise and pack wise retail price.
- Know the invoice pricings.

- Know the sales tax and other taxes pack wise.
- Know the retailer margin of each pack.
- Know the competitor products pricing M.R.P. , invoice, retail price, retail margin etc.
- Know the comparison between own and competitor pricings, retail margins, sizes etc.

► TARGET SPLITS

- Have target splits of each pack, town rise, distributor wise.
- Have the bases for the split.
- Have percentage growth of targets over last year.
- If possible have target split for distributor salesman wise.
- Update achievements also.
- Total target split should tally with territory target.
- For the target split format see reporting formats chapter.

► TERRITORY PROFILES

- Keep ready the territory profiles.
- For territory profile format see the reporting formats chapter.
- Have visiting places distributors profiles also.
- Have remaining distributor profiles for reference.
- Distributor profile format is available in reporting formats chapter.
- Keep all the territory and distributor profiles neatly typed or did in computer.

► ITINERARY

- Keep your itinerary ready.
- Any changes in itinerary, keep ready with reasons.
- Itinerary should be prepared by considering the below points.
- Covering all the town.
- Economical.
- No repetitive towns.
- Priority base towns coverage.
- Keep your sub-ordinates itinerary also ready.
- Should have clear idea on your sub-ordinated itinerary, particularly the boss visiting dates.
- Keep ready the contact phone numbers.

► PROMOTIONAL ACTIVITIES

- Should know the packwise, slabwise promotional activities of particular month.
- Able to tell last three months trade loads and promotional activities.
- Should know packwise average sales with promotions and without promotion in last three months.
- Know the competitor's promotional activities, percentage of scheme, operation period etc.
- If possible collect the P.O.P. of competitors promotional activities.
- Know last three months competitor's promotional activities.

► FINANCIAL BUDGETS

- Keep ready the "Financial Budgets" of your territory i.e., displays, Q>P>S> etc.
- Have the budget splits distributorwise and the period to be used.
- Have outletwise average budget allotted.
- Update the financial budget usage distributorwise.
- Formula to calculate average budget allotted per outlet:
: Display Budget

No. of outlets
- Distributorwise number of display windows taken and classification and category of outlets.
- Knowledge on competitors financial budget and activities.

► CHEQUES

- Keep ready the distributorwise cheques position with C & FA/ Super - Stockist?Consignee agent and cheque numbers.
- Follow the minimum cheque position norms with C & FA.
- Prepare distributorwise cheques to be presented by C & FA, amounts and dates.
- Keep cheque bouncings details, demand drafts collected, drafts to be collected, due dates etc ready.
- Genuine reasons for cheque bouncings.
- Reasons should tally with distributor's statements.

► OUTSTANDING

- Keep ready the cheque bouncing outstanding list.
- Do the ageing analysis.
- Prepare the ageing analysis as 15 days, 30 days, 45 days, 60 days and 90 days.
- Prepare genuine reasons for old outstanding.
- Prepare a plan to collect old outstanding with dates.
- What are all the efforts already made to collect the old outstanding.
- Compare the percentage of bouncing with sales in last three months.
- See reporting format for ageing analysis.

► BLACK BOOK

- Update the "Black Book".
- If "Black Book" is not there, prepare "Black Book" by selecting important foirmats from "Blacvk Book" chapter.
- Neatly maintain the "Black Book".
- Do not insert complicated format.
- "Black Book" should be simple, lite and easy to understand.
- Segregate the formats territory wise, distributor wise, profile wise etc.

► CLAIMS

- Keep the distributor wise pending claims list ready.
- Pending claims list should have the following details:
 - Activity.
 - Claim No.
 - Amount spent.
 - Budget allotted.
 - Date of submission.
 - Activity month.
 - Enclosures etc.
- For pending claims format see the reporting formats chapter.

► PRIMARIES

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

► SECONDERIES

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

► STOCK POSITIONS

- Keep ready the distributorwise godown stock position.
- Ratio of stock positions with primary and secondary targets and achievements.
- Prepare answers for huge stock positions if any.
- Prepare answers for low stock positions if any.
- Prepare answers for out of stock positions also.

► COMPETITOR'S INFORMATION

- Have the competitors information in full.
- Competitor companies distributors
- Addresses and phone numbers.
- Contact person.
- Business turnovers, investment.
- Coverage and coverage frequency.
- Experience.
- C & FA town and dispatch frequency.

- Company salesman, name, experience etc.
- Territory.
- Particular distributor working days.
- Infrastructure available etc.
- Market credit days.
- Financial terms with company, Etc.

► PRESENTATION

- Prepare a presentation to submit to boss.
- Territory in general, visiting towns in particular.
- Presentation should have profiles of personal, territory, distributor.
- Primaries, secondaries targets and achievements.
- Coverage analysis.
- Turnover analysis
- Callage and productivity.
- Promotional activities report.
- Budget v/s budgetary control.
- Contribution of brands/packs and turnover to territory.
- See reporting chapter for more information.

► BRIEFCASE OR BAG

- Arrange the files and other records neatly in order, in your briefcase or bag.
- Should be able to take out the required file easily.
- Territory map, town map compulsory.
- Pen, pencil, eraser, marker and calculator.
- Keep one empty pad.
- Keep some white papers.
- Extra pen, pencil and eraser.

► EXPENSE STATEMENT

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