

ETMS

Functionality Document

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Version 1.0

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1 Introduction

The ETMS solution provides the ability for the following functionalities:

- A) Hospital Management.
- B) Doctor Management
- C) Doctor Classification Management
- D) Product & Brand Management
- E) E-Territory Management
- F) Position Management
- G) Workable Days Management
- H) Daily Plan & Daily Report Management
- I) Coaching Management
- J) Sales Target & Sales Data Management
- K) Listing Management
- L) Sample Management
- M) Tender Management
- N) KPI Management

1.1 Terminologies

Terminologies	
Term	Description
CRM	Customer Relationship Management
IWG	ICE Water Global, LLC
SFDC	Refer to Salesforce.com
E-Territory	Territory in logical rather than location and in this project it means one MR + one Hospital + one Brand.
SR	Sales Representative
DSM	District Sales Manager
RSM	Regional Sales Manager
NSM	National Sales Manager
CM	Country Manager

2 Functions and Features

2.1 Hospital Management

In the ETMS solution Hospital visibility will be controlled by E-Territory Management functionality, and the Sales Rep as well as their managers will have limit access.

2.2 Doctor Management

In the ETMS solution one Doctor visibility will be controlled by the access to the Hospital, and SR will visit the Doctor to achieve their KPI. The Doctor will have to be activated (either manually or automatically) to be valid for daily visit.

[Change Request Management]

Modification on Doctor information will be controlled by the Organization policy and as a result the SR will have to raise a Change Request for the update. And then the system administrator will verify the request and make the final modification on the Doctor.

[Working Place Management]

The ETMS solution will also support to manage the situation where the Doctor working for multiple Hospital; and then the SR will be able to visit (or avoid to visit) the Doctor in different Hospital.

[Target Doctor Management]

In the ETMS solution the users will have the ability to identify who shall be visited according to the title/ influence / potential / loyalty and etc of the Doctor. And then the users will be able to plan the visits for the Target Doctor on a daily basis to achieve their KPI targets.

[Doctor Classification Management]

The ETMS solution will manage Doctor Classification to track working effectiveness, working progress, loyalty change or interest change of the Target Doctor. The marketing user will be able to generate reports to help them to identify who are the most important (or loyalty/ high potential) customers and adjust their marketing plans. In addition the managers will have the ability to identify which user is capable or better for customer development.

2.3 Product & Brand Management

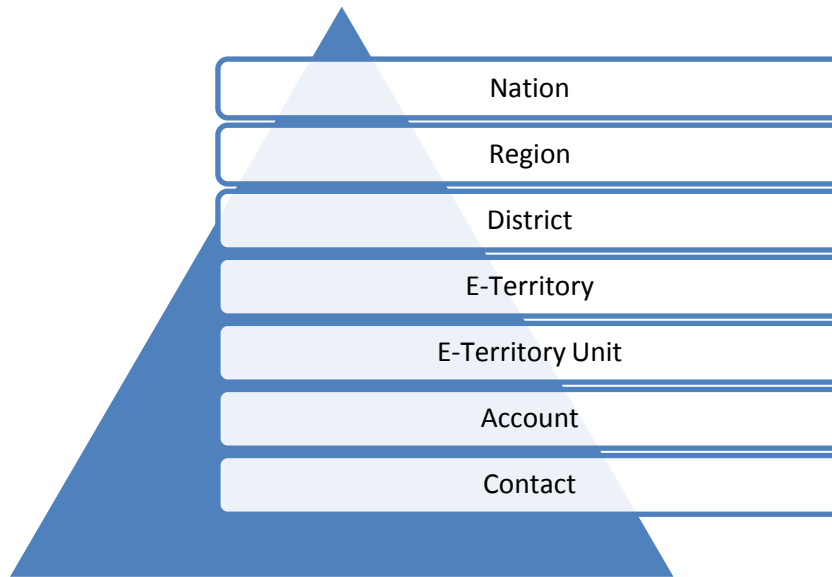
The ETMS solution also supports the management of Product & Brand; and the SR will visit the Doctor for product promotion. Therefore, the marketing user will be able to identify the promotion result of the Product & Brand so as to adjust their marketing plan.

2.4 E-Territory Management

The ETMS solution will be able to support E-Territory Management and assign Hospital access to the SR. E-Territory has the ability to extend the standard Territory Management to a further level where Hospital + Brand will be the basic unit and can be responsible to the SR. This also means that the Hospital will be visible for the SR to promote only the Brand allocated. As a result the SR will only be able to perform their activity for the Doctor working for the Hospital and has interest to certain Brand.

[Territory Hierarchy Management]

Territory Hierarchy supports the data analysis related to the E-Territory, e.g. Sales Analysis on E-Territory performance, Doctor loyalty among E-Territories etc.



[Territory Unit Management]

The ETMS solution defines an Hospital + a Brand to be unique for E-Territory. And this controls the access of the Hospital for all the users. Territory Unit can be assigned to the SR and then the Hospital + Brand will be visible for their daily activity.

2.5 Position Management

The ETMS solution also supports Position management where the SR may change frequently. Therefore, the Position will remain when the SR left and new SR join.

2.6 Workable Days Management

The ETMS solution will be able to manage workable days for different countries. Therefore, different countries will be able to manage their holidays separately and track the activity days of the SR.

2.7 Daily Plan Management

The ETMS solution provides the functionality to manage the daily plan of the users such as: plans to visit the Doctor, plans for leave/ meeting/ training etc. Coaching to the SR will also be supported, and the managers will be able to plan their coaching and create the assessment form of the SR when it is done.

2.8 Daily Report Management

The ETMS solution also manages the daily report of the users to track the actual activities; and the managers will also be able to compare them with the pre-plan to analyze the performance of the users.

2.9 Sales Target & Sales Data Management

The ETMS solution also supports to manage the Sales Target & Sales Data and analyze territory performance of them.

2.10 Listing Management

The ETMS solution supports the Listing process to track the plan and the progress of their Listing. Additionally the marketing user will be able to analyze the Listing progress and the result on the Territory basis.

2.11 Sample Management

The ETMS solution supports to manage the Sample of the products for each SR. Therefore, the ETMS will track the information related to the Sample Delivery (and inventory management of the Sample).

2.12 Tender Management

The ETMS solution also supports to manage the Tender of the Product or Brand; and the managers will be able to generate reports and analyze and the progress of the Tender.

2.13 KPI Management

The ETMS solution supports KPI management with the following components:

[KPI Target Management]

The system administrator will be able to set the target for the users.

[KPI Assessment Calculation]

The ETMS solution will track the Daily Plan and compare them with the Daily Report to generate the KPI results.