

# Pre Sales Engine - Atradius

## User Interaction Specification Document

Version 1.0 (First draft)

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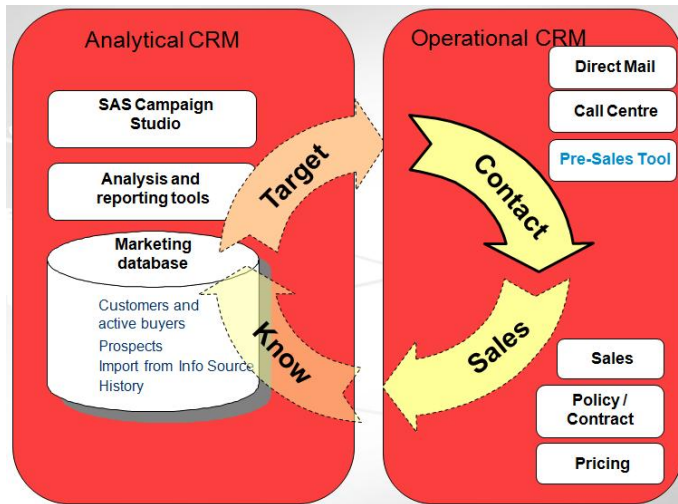
The purpose of this document is to propose user experience of Integrated Business Planning process tool. The UI mock ups and flowcharts appearing in this document are based on available ongoing development architecture of the current application and project proposal document.

**A. Project goal**

- Improve the pre-sales business process for Sales Germany
- Provide a better support for lead generation and suspect data management
- Ease of management of tasks
- Centralised repository of all the pre-sales activities and data
- Make a show case for the New Application Architecture
- Business buy-in for the New Application Architecture

**B. Overview**

- The project German Pre Sales Tool is based on requirements from the German commercial unit for an application that facilitates more efficiently their administration of suspects/prospects.
- The Main objective of application is to track, monitor the Pre sales activities and create sales cycles.
- It will use data from SAS Campaign Studio and the Marketing Database (MCID), including externally purchased data and feed data into Symphony based applications like the Sales Tool (sales process) and Customiser (contact history).



### C. Features

- Suspect Pipeline – overview of all the sales managers suspects
- Suspect Overview – direct access to all relevant suspect data
  - Suspect Contacts, Broker Contacts
  - Financial Data
  - Competitors
  - Previous Sales Attempts
  - Notes / Attachments
  - Current and historic actions
- Assign tasks, plan actions / visits with an MS Outlook integration
- Sales interface – Create Sales Cycle, no double entry of data
- On the road access
- Adjustable to the users layout preferences

### D. User experience goal

Pre-sales tool performs the pre-sales activities, contacts the suspects, enriches the suspect organisation data, plans next contacts and visits. Can be performed by the Sales Manager, Sales Support and Central Market Supporter.

While choosing an appropriate structural flow of tracking the main user experience goals are to ensure two basic design principle :

#### Principle of Congruence

The structure and content of a visualization should correspond to the structure and content of the desired mental representation and well connected.

#### Principle of Apprehension

The structure and content of a visualization should be readily and accurately perceived and comprehended as quicker as possible

Therefore this design proposal stands for :

Appropriateness of visual representation and should provide neither more or less information than that needed.

#### Naturalness Principle

Experiential cognition is most effective when the properties of the visual representation most closely match the information being represented. Purely artificial visual metaphor can actually hinder understanding.

#### Matching Principle

Effective visual representation should present affordances suggestive of the appropriate action.

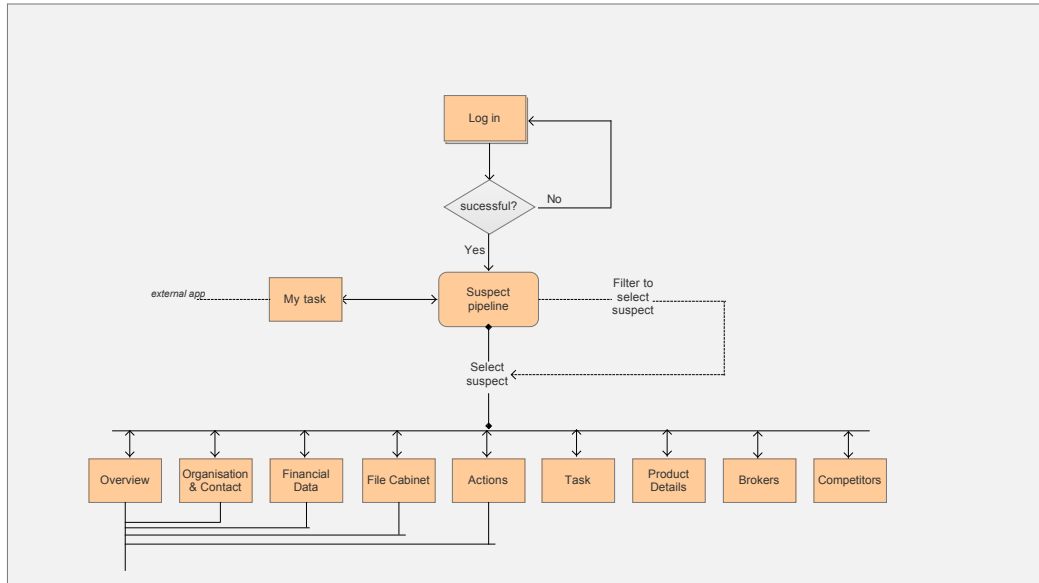
### E. Target User

1. **Sales Manager** - In Germany the Sales Manager performs the Marketing activities, Sales Managers are organised in regional offices and home offices.

2. **Sales Support** - Some of the Sales Managers tasks can be delegated to Sales Support, mainly administrative tasks like preparing the quote etc. but also chasing prospects who have received a quote in order to check the status or cold calls like the Central Market Supporter

3. **Central Market Supporter** - Person that acts as telemarketing agent who has access to all suspect addresses of all Sales Managers; they call suspects ("cold calls") with the aim to arrange an appointment with the Sales Manager who is responsible for the region of the suspect; the feedback must be recorded in the tool, after successful arrangement, the next step is the handover to the Sales Manager

E. User Flow



F. User Scenarios

**User Scenario 1- Main Goal**

- User login to application
- User get view on Landing screen with suspect pipeline list
- User can filter the suspect pipeline list with specific details
- User can select only one suspect
  - click on the arrow on specific row to view more content
  - double click on the row it navigate to the overview tab screen as well as other eight different tabs [Organization & Contacts, Financial data, File cabinet, Actions, Task, Product Details, Brokers, Competitors ]
- User can view the details of information on the overview screen in different panels
- User can also view the particular panel, more data in the respective tab
- User can edit the existing data
- User can add new data
- User also can back to the Landing page with Suspect pipeline list view

**User Scenario 2 – My task**

- User can view my task summary on Landing page with highlights
- User get the My task' button next to the login details, this is constant to entire application
- User can click on any of the highlights and navigate to the my task page or user can directly click on the my task button
- User can get the list of task after navigate the my task page
- User can do the action like; add new task, edit task and status, delete task

# Wireframes

Column 1

Column 2

Column 3

Atradius NAA Pilot : Germany
x

## Pre Sales Tool

managing risk, enabling trade

My Task

Welcome to User  
Date: 9th February  
Role: Sales Manager

### Suspect pipeline

Export
Favourite
Search by Filter

Label name 1:

Label name 1:

Label name 1:

Label name 1:

Label name 1:

Label name 1:

Label name 1:

Label name 1:

Label name 1:

Search
Cancel

Symphony ID	Organization	City	Trade Sector	Turn over	Campaign	Action
10349087	ANTON SCHNEIDER GMBH	KENZINGEN	Manufacture and others	€ 1459.90 m	1032A - Campaign 2012	Email
<div style="display: flex; justify-content: space-between; align-items: flex-start; padding: 5px;"> <div style="width: 30%; font-size: 7px;"> <p><b>ANTON SCHNEIDER GMBH</b> Address: Tullastraße 3, 79341 Kenzingen, Germany Phone +49 (0) 7644 / 9102-0, Fax +49 (0) 7644 / 8208 E-mail: info@schneiderkenzingen.de, <a href="http://www.schneiderkenzingen.de">www.schneiderkenzingen.de</a></p> </div> <div style="width: 25%; font-size: 7px;"> <p><b>Product and Trade sector</b> Variant C+ Variant T+ Variant S+ Cabinet, Shelf, Desk</p> </div> <div style="width: 20%; font-size: 7px;"> <p><b>Financial summary</b> Turnover € 1459.90 m 54.81 +0.56 (1.03%) Feb 8 - Close</p> </div> <div style="width: 20%; font-size: 7px;"> <p><b>Pre sales lead follow up log</b> 12/12/2012 Campaign launched 13/12/2012 Send email messages 15/12/2012 Create telemarketing Track<sup>®</sup> for follow-up 18/12/2012 Brocker assigned to ABC Company</p> </div> <div style="width: 5%; text-align: center; font-size: 10px;"> <span style="background-color: #e91e63; color: white; padding: 2px 5px; border-radius: 3px;">More</span> </div> </div>						
30569021	BEIDERMANN MOTECH	HERBOLZHIEM	Wholesale and Pharmaceuticals	€ 1459.90 m	1032A - Campaign name	Email
10349087	ANTON SCHNEIDER GMBH	KENZINGEN	Manufacture and others	€ 1459.90 m	1032A - Campaign 2012	Email
30569021	BEIDERMANN MOTECH	HERBOLZHIEM	Wholesale and Pharmaceuticals	€ 1459.90 m	1032A - Campaign name	Email
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10349087	ANTON SCHNEIDER GMBH	KENZINGEN	Manufacture and others	€ 1459.90 m	1032A - Campaign 2012	Email

#### My Task Summary

04

High priority tasks

**Task Description**

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat

20

Initiated Tasks

**Task Description**

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat

**Task status**

Assigned :  12

Rejected:  07

Completed:  06

Column 1

Column 2

Column 3

Atradius NAA Pilot : Germany
https://atradius/NAA

Pre Sales Tool
My Task
Welcome to User  
Date: 9th February  
Role: Sales Manager

Suspect pipeline for Anton Schneider GMBH
Print | Email

Symphony ID	Organization	City	Trade Sector	Turn over	Campaign	
10349087	ANTON SCHNEIDER GMBH	KENZINGEN	Manufacture and others	€ 1459.90 m	1032A - Campaign 2012	<input checked="" type="checkbox"/> Organization & Contact <input checked="" type="checkbox"/> Financials <input checked="" type="checkbox"/> File Cabinet <input type="checkbox"/> Actions <input type="checkbox"/> List of task <input type="checkbox"/> Product Details <input checked="" type="checkbox"/> Brokers <input checked="" type="checkbox"/> Competitors

**Organization & Contact**

**ANTON SCHNEIDER GMBH**  
 Address: Tullastraße 3, 79341 Kenzingen, Germany  
 Phone +49 (0) 7644 / 9102-0, Fax +49 (0) 7644 / 8208  
 E-mail: info@schneiderkenzingen.de,  
[www.schneiderkenzingen.de/](http://www.schneiderkenzingen.de/)

**Credit Insurance Details**  
 Active Buyer  
 Number of credit limits : 3  
 Total commitments : 180000  
 Number of claim : 0

**Establishment Details**  
 Parent company : ABC  
 Establishment: 3/11/1957  
 CRO Number: 180000  
 VAT Number : 0

**Contact details**  
 Sales Contact: ABC  
 Office Contact: 3/11/1957  
 Administrative : 180000  
 Other Contact : 0

**Financial Data**

Turnover Domestic Sale Export Buyers Employee

Year	Turnover	Domestic Sale	Export	Buyers	Employee
2012	€ 1459.90 m	€ 1459.90 m	€ 1459.90 m	340	12000
2011	€ 1459.90 m	€ 1459.90 m	€ 1459.90 m	234	11400
2010	€ 1459.90 m	€ 1459.90 m	€ 1459.90 m	518	9700
2009	€ 1459.90 m	€ 1459.90 m	€ 1459.90 m	450	2000

**File Cabinet**

Notes

Attachments

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**Organization & Contact information**

**Top three competitors**

The Capital Group Companies

Role type: Credit Insurer	From 12/12/12- To 13/01/2013	Premium rate : € 1459.90 m	Broker: Dodge & Cox
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Fidelity Investments

Role type: Credit Insurer	From 12/12/12- To 13/01/2013	Premium rate : € 1459.90 m	Broker: Dodge & Cox
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The Bank of New York Mellon

Role type: Credit Insurer	From 12/12/12- To 13/01/2013	Premium rate : € 1459.90 m	Broker: Dodge & Cox
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**Financial Information**

**Broker: Columbia Management Group**

Mr. Thomas Hoops  
Job title : Broker

**Contact details**  
 Address: Tullastraße 3, 79341 Kenzingen, Germany  
 Phone +49 (0) 7644 / 9102-0, Fax +49 (0) 7644 / 8208  
 Sales Channel : Active

**Broker's Activity**

02/02/2012: Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat

02/02/2012: Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat

**File Cabinet**

**On 02/02/2013 (Latest)**  
 Action : Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat  
 Product : Lorem ipsum dolor sit amet, consectetur adipiscing elit  
 Priority : High  
 Atradius Contact : Mr. Rivera

**On 02/01/2013**  
 Action : Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat  
 Product : Lorem ipsum dolor sit amet, consectetur adipiscing elit  
 Priority : High  
 Atradius Contact : Mr. Rivera

Competitors
Brokers
Task for ANTON SCHNEIDER GMBH

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