

**BUILT FOR IT.™**



# Sumatera – Java Alignment Project

## Interaction Management Model Information Pack

Human Capital, OSM and BRAVE

October 2017

Document Confidentiality Level: Yellow

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# Post Mortem Findings:

## These are the agreed business problems that need to be addressed for the Regions to operate effectively



The issues are broader than the Operation and the organization structure. The business problems are primarily related to cross-functional collaboration, communication, metrics, incentives, and people development.

Organization Aspect	Problem Description
<b>Strategy</b> 	<ul style="list-style-type: none"> <li>Prime Product Marketing's pricing organized by industry is confusing for Territory Sales and Type A Customers, and pricing for the same equipment can vary both within and across customers. With the new Vision 2020 A/B customer model, Sales and Operations are missing a defined go-to-market approach for standard customer management.</li> </ul>
<b>Coordination, Control &amp; Incentives</b> 	<ul style="list-style-type: none"> <li>Dotted line reporting relationships don't have any formal authority in performance reviews or compensation decisions; dotted reports are often not responsive to their indirect manager</li> <li>Too many KPIs for each job, and many financial KPIs are shared among jobs that don't have control of or visibility into the metric</li> <li>Information sharing and collaboration is lacking between Region and Head Office functions (e.g., misalignment with Learning &amp; Dev and Region training needs)</li> </ul>
<b>People &amp; Process</b> 	<ul style="list-style-type: none"> <li>Prime Product Sales lacks industry and competitor knowledge to communicate effectively with customers; PPSR relies on Region Operations to fill in these gaps</li> <li>Product Support Sales lack the technical and services knowledge to communicate with customers; PSSR is adding time but not adding value in the service quotation process</li> <li>There are gaps in execution on some process interactions across Finance, Sales, Operations (e.g. expense approvals)</li> <li>Product Support Marketing doesn't communicate with Operations regarding promotion launch or performance.</li> </ul>

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# Sumatera & Java Alignment Project is a Prerequisite for the OD 2.0 Design & Implementation Project (Kalimantan)

## Interaction Management

- **Revisit governance model across Java/Sumatra at L2-4 levels (Region plus CEG functions and Head Office)** – decision rights/RACI, meeting cadence & topics, metrics, roles & responsibilities
- **Review and create consistent business process and interactions at L5 levels and below (inclusive of support functions)** – roles & responsibilities, decision rights, metrics

## Possible Action Plans following up the IMM Workshop:

- Review/update business process
- Update roles & responsibilities
- Update decision rights / RACI
- Update KPIs & metrics
- Update meeting cadence / topics
- Prepare L2-4 leaders to sponsor the change
- Conduct IMM workshops at L2-4; L5 and below
- Design handoffs with support functions L5 and below



**Standardized model to be replicated to Kalimantan & throughout Indonesia**



# Interaction Management Model (IMM): Overview

## Interaction Management Model

- Mengidentifikasi interaksi yang diperlukan antar fungsi melalui skenario-skenario yang umumnya sangat sering terjadi dalam pekerjaan sehari-hari dan kerap menimbulkan masalah dalam berinteraksi
- Cara ini diharapkan efektif dalam memahami cara berinteraksi yang efektif berikut peran dan tanggungjawab masing-masing pihak



Pemetaan **Interaction Management** dilakukan dalam beberapa workshops

- Memetakan interaksi yang terjadi (as-is interactions) baik yang memiliki SOP maupun merupakan praktek yang terjadi sehari-hari



Membuat improvement dari interaksi yang ada

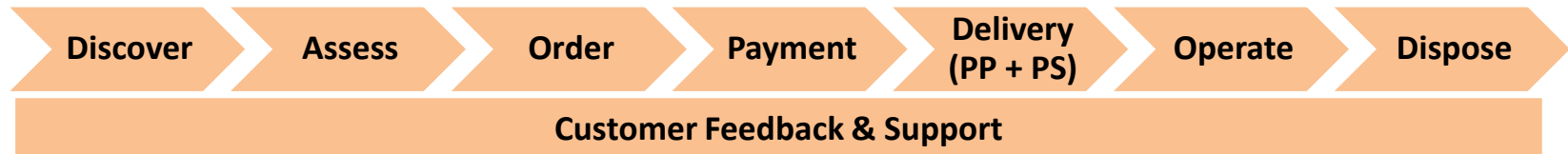


Validasi dan konsensus



# Customer Experience Journey - 7 Customer Touch Points- The Focus of the IMM

Advancing Customers Forwards by Creating Excellent Customer Experience



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**Request**

**Event Management**

**OTIF Response**



**Request**

**Lead Management**

**Manage Opportunity to Deal**

**Complaint**

**Issue Management**

**Issue Resolution**

**Experience Recovery**

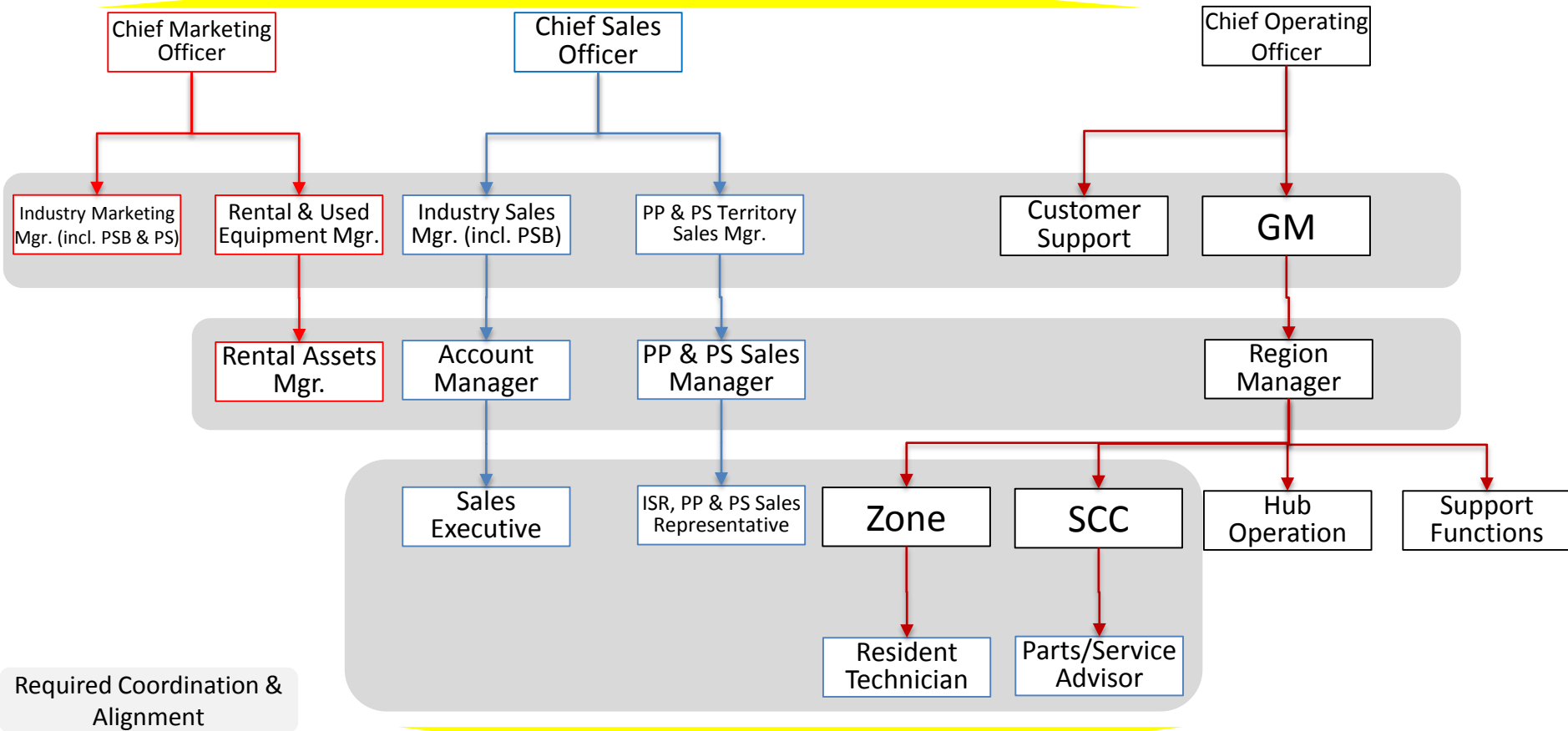
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# Trakindo Customer Facing Organization – Required Alignment & Coordination (Sumatera & Java Model)

Caterpillar



Customers

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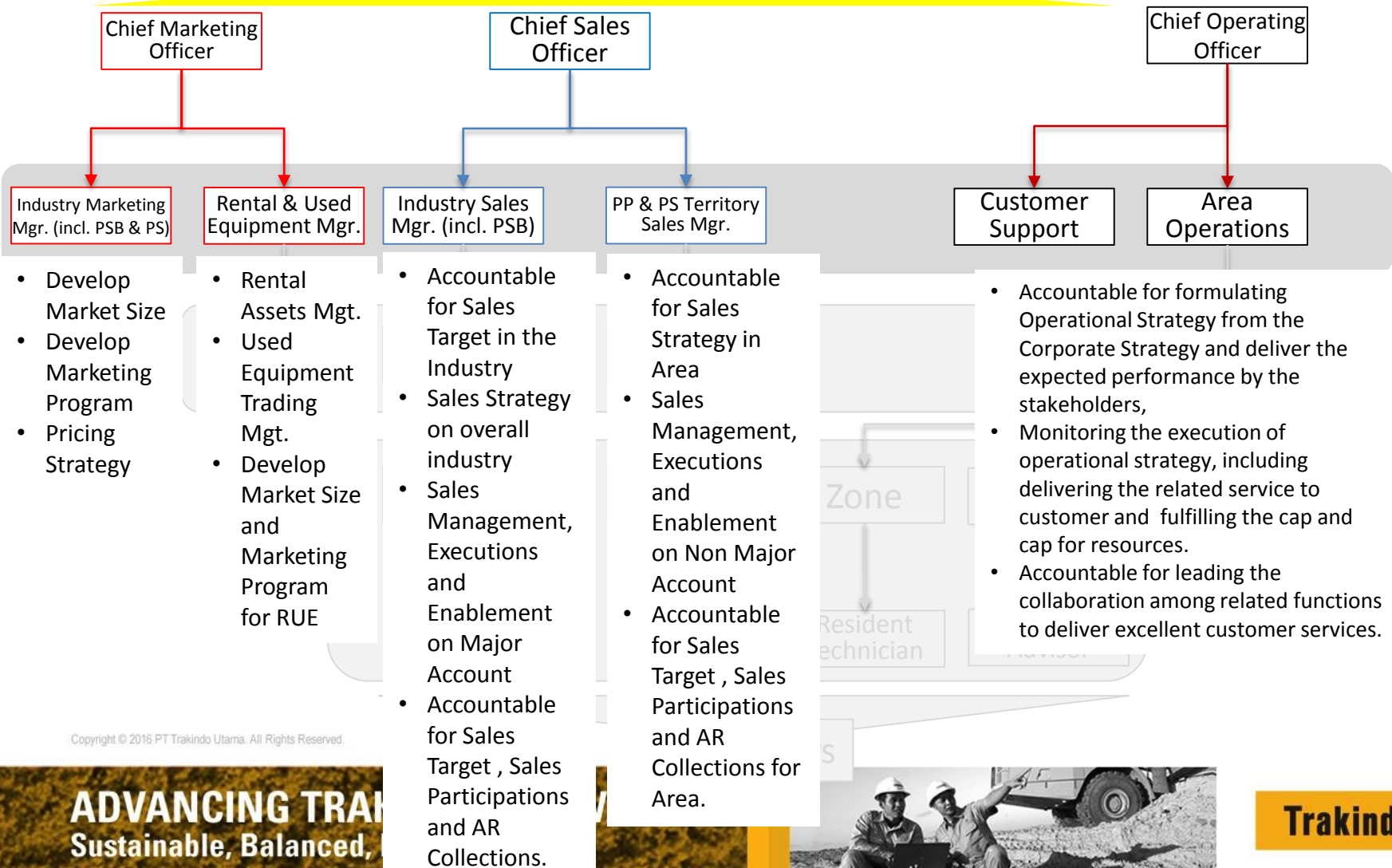
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# Summary of Roles & Responsibility for Customer Facing Functions

Caterpillar



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# IMM Workshop Schedule

Western Java Region	Eastern Java Region	Northern Sumatera Region	Southern Sumatera Region
Friday 13 October & Monday 16 October	Thursday 9 November & Friday 10 November	Wednesday 23 November & Thursday 23 November	Wednesday 15 November & Thursday 16 November
Venue: Regional Office - BSD	Venue: Regional Office - Surabaya	Venue: Regional Office - Pekanbaru	Venue: Regional Office - Palembang

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# Agenda

## Day- 1

Time Slot	Topics	Facilitators
08.30 – 09.00	Opening & Introduction to Interaction Management Model	GM / Region Manager IMM facilitator
09.00- 10.30	Scenario 1 Assets Handover	IMM facilitator
10.30-10.45	Break	
10.45- 12.00	Scenario 2 Request to Purchase with Contract	IMM facilitator
12.00-13.00	Lunch	
13.00-14.00	Scenario 3 Purchase with Bundling on CAT 360 Program	IMM facilitator
14.00-15.00	Scenario 4 Repair with credit limit issue	IMM facilitator

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# Agenda

## Day- 2

Time Slot	Topics	Facilitators
08.30 – 09.00	Opening & Introduction to Interaction Management Model	GM / Region Manager IMM facilitator
09.00- 10.30	Scenario 5 Rental Purchase Option	IMM facilitator
10.30-10.45	Break	
10.45- 12.00	Scenario 6 Rental Break Down Event	IMM facilitator
12.00-13.00	Lunch	
13.00-14.00	Scenario 7 Rental Unit Repossessing	IMM facilitator
14.00-15.00	Additional Scenarios (if any) and Closing	IMM facilitator

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# Scenario (1/2)

No	Scenario Description	Discover/ Assess	Order	Delivery	Payment	Operate	Dispose	Stakeholders
1	Delivery of new unit of 313D2 LGP, whereby the sales is in Java and the delivery will be in Sumatera Region, with delivery unloading will be done by customer. How we should collaborate internally to issue BAST and DSR.			X				PP Sales, PS Sales, PP Supply Chain – Distribution, SCC – Event Planner, Zone Leader
2	Customer purchased new unit with request for Contract PM and parts consignment for his fleet of 10 320D2 for 1 year.			X		X		PS Sales, PP Sales, Contract Management, SCC – Customer Development, PS Sales Support, Zone Leader, Region Manager
3	Customer purchased 950GC with Marketing program CAT360. How sales & operation execute this program.			X		X		PS Marketing, Industry Marketing, Sales Support HO, PP Sales, PS Sales, SCC Head, Part Advisor, SCC – Condition Monitoring
4	After TA inspection by Resident Technician, He or she recommend Customer for hydraulic repair. Customer request for quotation and price negotiation. However, currently the customer have credit limit issue.				X	X		PS Sales, SCC – Condition Monitoring, PS Sales Support, Technician, Zone Leader.



# Scenario (2/2)

No.	Scenario Description	Discover/ Assess	Order	Delivery	Payment	Operate	Dispose	Stakeholders
5	Customer purchased 3 unit with RPO (Rental Purchased Option) program. How should we collaborate internally starting Quotation process, rental agreement and roll in?			X	X	X		PP Sales, PP & RUE Manager, RUE Asset Manager, Finance, Rental Coordinator, Region Manager.
6	One of new RPO unit is breaking down and customer urgently ask for unit repair. How internally collaboration to find solution.					X		SCC – Service Advisor, Rental Coordinator, PP & RUE Sales Manager, Region Manager, PP Sales, SCC – Event Planner.
7	Customer is not committed for 2 RPO unit after 6 months. How the operation and sales collaborate on handling this unit from repossessing process?						X	Region Manager, Rental Coordinator, PP Sales, PP & RUE Manager, UE Trading Manager, Zone Leader, PP Supp Chain – Distribution, SCC – Event Planner.



# IMM Participants

No	Roles	Scenario							JAVA		SUMATERA	
		1	2	3	4	5	6	7	West	East	North	South
1	Sales Support Manager			x					Arthur W	TBA	TBA	TBA
2	PS Sales Manager	x	x	x	x				Widi	Luluk	Azhar	Mardiyanto
3	PS Sales Support Manager		x		x				Tika		Artalinda	Diana
4	PS Marketing Manager			x					Arif Prawira	Arif Prawira	Arif Prawira	Arif Prawira
5	PP Sales Representative	x	x	x		x	x	x	Fezan G. Razak Bayu Rizky Anggadha	Nugroho Setyo A. Lutfi Destia Rohmat	Bobby Pranoto Patmos Kaban Lukas Goh	Lukas Goh Thomy Indaryanto
6	PP Supply Chain - Distribution	x						x				
7	PP /RUE Sales Manager					x	x	x	Refnal Marzuki	Haris Junaidi	Muhammad Taufiq	Maxy Beryliansa
8	RUE Asset Manager					x			Randika	Randika	Randika	Randika
9	Rental Coordinator					x	x	x	Donan Perdana			
10	Industry Marketing			x					Rozy Andrianto	Rozy Andrianto	Rozy Andrianto	Rozy Andrianto
11	UE Trading Manager							x	R. Yudhistira	R. Yudhistira	R. Yudhistira	R. Yudhistira
12	SCC – Condition Monitoring			x	x				Rika Muhafidoh	TBA	TBA	TBA
13	SCC – Customer Development		x						Lara Octora	TBA	TBA	TBA
14	SCC – Event Planner	x						x	Fitra Cahyo	TBA	TBA	TBA
15	SCC – Service Advisor							x	Muhalifansyah	TBA	TBA	TBA
16	SCC Head			x					Conerisman	TBA	TBA	TBA
17	Technician				x				Cumris	TBA	TBA	TBA
18	Zone Leader	x	x		x			x	Endri Asmoro / Sukardi	TBA	TBA	TBA
19	Contract Management		x						Richard Intan	Richard Intan	Richard Intan	Richard Intan
20	Region Manager		x			x	x	x	Risang Wijanarko	Azkhwaldi Aziz	Hendra Suryana	I Putu Bawa
21	Parts Advisor			x					Marlin Fransiska	TBA	TBA	TBA
22	Finance					x			Robert	TBA	TBA	TBA

# IMM Team Members

Western Java Region	Eastern Java Region	Northern Sumatera Region	Southern Sumatera Region
<b>Facilitators:</b> Mardinanto Capelle Edi Santoso Andreas Sugi Duli	<b>Facilitators</b> Mardinanto Capelle Edi Santoso Sony Djuhansyah	<b>Facilitators:</b> Delianti Naim Mardinanto Capelle Kemal Anshori	<b>Facilitators:</b> Delianti Naim Mardinanto Capelle Ajeng Nurul F.
<b>Supporting Team:</b> Gladys Mayssa H. Sukarwanto Ajeng Nurul F	<b>Supporting Team:</b> Gladys Mayssa H.	<b>Supporting Team</b> Gladys Mayssa H.	<b>Supporting Team:</b> Gladys Mayssa H.

