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SPECIFICATION

BUSINESS MANAGEMENT METHOD, COMPUTER FOR IMPLEMENTING THE SAME, AND SOFTWARE

Technical Field

The present invention relates to a method, a computer and a software program for managing business activities such as route sales.

Background Art

For the purpose of managing business activities, it is the general practice to use a daily report in which a sales representative records daily result of activities. As a result of the recent progress in computer and network technology, it is now possible to accomplish daily report management by use of a computer.

However, in the conventional method using daily reports, the sales representative prepares a daily report by retracing the memory after the end of sales activities for the day. This requires much time, and has a problem in reliability. Past records including results, fruits and other information are reported to the superior on the basis of the thus prepared daily reports, and the sales representative searches his or her conscience on the past behavior. The way of thinking becomes therefore inevitably negative, and this often inhibits improvement of motivation.

The present invention was developed in view of the circumstances as described above and has an object to provide a technical idea which contributes to achievement of a higher efficiency of reporting operation of

results of business activities, betterment of the sense of purpose of sales representatives, and improvement of reliability of data regarding activity results.

Disclosure of Invention

To achieve the aforementioned object of the invention, claim 1 provides a business management method for managing the situation of business activities, which enables each sales representative to previously prepare his or her own activity schedule for the next working day; and, after actual business activities, to prepare an activity result report with reference to the activity schedule already prepared.

The method recited in claim 1 is not a method of only reporting past results as in the conventional art, but a method of preparing a schedule for tomorrow (the next working day), and furthermore, reporting the activity result on the basis of the prepared schedule. As a result, it is not necessary to retrace the past memory when preparing an activity result report, thus permitting reduction of time required for reporting operation of the activity result (preparing operation of a daily report). Because this is a method of reporting the activity report on the basis of the prepared schedule, it is possible to improve reliability of data regarding activity result. Since the sales representative must decide what should be done tomorrow (the next working day), it is possible to improve the sense of purpose of the sales representative, and improve details (quality) of business activities.

A method according to claim 2 enables each sales representative to prepare, in addition, a long-term activity schedule for a certain period of time,

and to prepare the activity schedule for the next working day on the basis of the long-term schedule. As is mentioned in claim 3, the period of the long-term schedule data may be for four weeks. According to the method in claim 2 and claim 3, it is possible to set a proposed number of visits to customers during a certain period of time (four weeks), and correlate it with the activity schedule (activity plan) for the next working day. This ensures efficient visits to customers, and easy and timely change in activity in response to the result.

A method according to claim 4 automatically performs evaluation of each customer on the basis of prescribed data, and makes data about the customer evaluation perusable by any of the sales representatives. According to the fourth aspect of the invention, a sales representative can make a schedule for the next working day with reference to data of customer evaluation. As a result, it is possible to work out an effective business visit plan free from unevenness or wasteful efforts by determining a planned number of visits to customers (distribution of business resources) through business analysis.

Claim 5 provides a computer used for a management system of the situation of business activities, comprising a personal data file capable of recording at least daily activity result for each sales representative; an activity schedule input form which is an input form for recording a schedule of business activities for the next working day and used for entering activity results; an authentication file storing data for authenticating each sales representative; and a processing unit which, when a sales representative makes a login to the computer by entering his or her authentication data,

confirms that the sales representative is the person in question on the basis of the data stored in the authentication file, and permits login only in the case of the person in question.

The computer according to claim 5 has a configuration in which not only past results are entered as in the conventional art, but also a schedule for tomorrow (the next working day) is entered into a prescribed input form, and furthermore, an activity result is reported in the same input form. As a result, it is not necessary to retrace the past memory when preparing an activity result report, thus enabling the sales representative to reduce the time required for preparing a report of the activity result (preparing operation of a daily report). Because this is based on a method of reporting an activity result on the basis of the prepared schedule, it is possible to improve reliability of data regarding activity results. In addition, the sales representative has to determine what should be done tomorrow (the next working day), it is possible to improve the purpose consciousness of the sales representative, and thus to improve contents (quality) of business activities.

Claim 6 provides a computer which enables the sales representative to log in via internet. By adopting this configuration, it is possible for a sales representative to access the computer (inhouse server) at any place including at customers, his or her own home, or within the company, and thus to improve the operating efficiency.

A computer according to claim 7 comprises a common information file storing general data regarding business, in addition to the activity schedule and activity results, wherein data in the common information file are perusable by any sales representative other than the sales representative

having entered the data. This configuration provides advantages in that the computer is applicable as a database storing useful information, in addition to management of activity schedule and activity results, thus permitting effective use of pieces of information so far having lived in obscurity.

In a computer according to claim 8, long-term schedule data for a certain period of time can be recorded for each sales representative in the personal data file. As described in claim 9, the period for the long-term schedule data may be set as four weeks. According to claim 8 and claim 9, it is possible to set a number of visits to customers during a certain period of time (four weeks), and correlate it with the activity schedule (activity plan) for the next working day. It is therefore possible to make effective visits to customers, and timely change conducts in response to the achievements.

In a computer of claim 10, the processing unit prepares customer evaluation data by automatically evaluating individual customers; and the customer evaluation data are perusable by any of the sales representatives. According to claim 10, the sales representative can work out a schedule for the next working day with reference to the evaluation data of the customer. As a result, it is possible to determine the proposed number of visits (distribution of business resources), and work out an effective visit schedule free from unevenness or wasteful efforts.

A software program of claim 11 comprises a step of requesting an accessing party to enter authentication data in the software used in a management system of the situation of business activities; a step of authenticating login to the personal page of the person in question, on the basis of the authentication data entered in accordance with the request; a

step of displaying an input form entering an activity schedule for the next working day for the sales representative himself or herself having performed login; a step of storing the activity schedule entered in compliance with the input form; a step of displaying an activity result input form for entering an actual activity result by use of the activity schedule; and a step of storing the activity result entered in accordance with the activity result input form.

When using the software program of claim 11, there is available a configuration in which, not only past results are simply accumulated as in the conventional art, but also a schedule for tomorrow (the next working day) entered in accordance with a prescribed input form are stored, and in addition, activity results entered in the same input form are stored. As a result, it is not necessary for a sales representative to retrace the past memory when preparing an activity result report, thus enabling to reduce the time for reporting operation of activity result (daily report preparing operation). Because this is based on a method of reporting activity results on the basis of a prepared schedule, it is possible to improve reliability of data regarding activity results. The sales representative must consider what should be done tomorrow (the next working day). The sales representative can therefore improve the purpose consciousness, thus making it possible to improve contents (quality) of business activities.

In the invention of claim 12, a sales representative can perform login via internet. In this configuration, the sales representative can access the computer at any place such as at customers, in his or her own home, or in the company (inhouse server), thus permitting improvement of operating efficiency.

In the invention of claim 13, a step of preparing a common information file which stores general business data, in addition to the activity schedule and activity result, is executed; and data in the common information file are perusable by any sales representative other than the one having entered the data. This configuration provides advantages in that, apart from management of activity schedules and activity results, the computer can be used as a database storing useful information, and information so far buried under the ground can be effectively utilized.

In the invention of claim 14, the personal data file can record long-term schedule data for a certain period of time for each sales representative. As mentioned in claim 15, the period of the long-term schedule data may be set to four weeks. According to claim 14 and claim 15, it is possible to set a number of visits to customers during a certain period of time (four weeks), and to correlate it with the activity schedule (activity plan) for the next working day. As a result, it is possible to make efficient visits to customers, and timely change conducts in response to the result.

Claim 16 further comprises a step of automatically evaluating each customer to prepare customer evaluation data by operating the processing unit, wherein each sales representative can peruse data regarding the customer evaluation. According to claim 16, it is possible for each sales representative to make a schedule for the next working day with reference to the customer evaluation data. As a result, it is possible to determine a number of visits to be made to customers (distribution of business resources) through business analysis, and to make an efficient visit plan free from unevenness or wasteful efforts.

Brief Description of the Drawings

Fig. 1 is a descriptive view (network diagram) illustrating a configuration of the business management system of an embodiment of the present invention;

Fig. 2 is a flowchart illustrating the procedure to be followed when entering an activity schedule for the next working day in this embodiment;

Fig. 3 is a flowchart illustrating the procedure to be followed when entering an activity result for the current day in this embodiment;

Fig. 4 illustrates a typical screen displayed by a server used in this embodiment; and

Fig. 5 is a descriptive view used for explaining the method of customer evaluation in this embodiment.

Best Mode for Carrying Out the Invention

Embodiments of the present invention will now be described by means of a business management method of route sales for daily visiting a plurality of customers.

Fig. 1 is a descriptive view (network diagram) illustrating a configuration of the business management system of an embodiment of the present invention. The system of this embodiment comprises a server 10 installed in the principal office of the company; another server 12 installed in a branch office; a computer 14 connected to the network for carrying out maintenance of the system; personal computers 16a, 16b, 16c and 16d for sales representatives connected to the server 10 of the principal office;

personal computers 18a and 18b for sales representatives connected to the server 12 of the branch office; and a mobile terminal 20.

In the server 10, an operating system, an SQL data server software program, an internet perusing browser, a retrieving software program, and a web site are installed or stored as data. In the server 12, at least an operating system, and a web site are installed or stored as data. In the maintenance computer 14, an operating system, an internet perusing browser, a retrieving software program, a web site and the like are installed or stored as data. The computers are connected to each other by means of internet, LAN and intranet.

The server 10 has a personal data file for recording activity schedules and activity results for each sales representative; an activity schedule input form which is an input form for recording business activity schedule for a day, and is applicable for entering activity results; an authentication file storing data for conducting authentication of sales representatives; and a processing unit for carrying out a login. The server 10 has furthermore a common information file which stores general data regarding business. Data stored in the common information file are perusable by sales representatives other than the person having entered the data.

The personal data file stores long-term schedule data for four weeks. While the period for long-term schedule data is not limited to four weeks, but should preferably be set in units of week such as 12 weeks. It is caused to automatically calculate and display results for customers visited during a prescribed period in the form of a management table, as well as dates of last visits, scheduled dates of visits to be made before the next visit, and a

warning display of customers not as yet visited after expiration of the scheduled dates of visits.

The server 10 stores various customer data so as to permit automatic evaluation of the individual customers. Each sales representative can thus make a schedule for the next working day with reference to the customer evaluation data. That is, it is possible to determine the number of visits to be made to customers (distribution of business resources) through business analysis, and work out an efficient visit plan free from unevenness or wasteful efforts.

Applicable personal computers and portable terminals connected to the servers 10 and 12 include notebook-sized personal computers, as well as personal information tools (PDA) and cellular phones.

Operations in this embodiment will now be described with reference to Figs. 2 and 4. Fig. 2 illustrates a procedure to be followed for entering an activity schedule for the next working day; and Fig. 3 illustrates a procedure to be followed when entering an activity result for the day. When a sales representative operates to access to the server 10 from the personal computer 16a or the like via internet, the server 10 requests input of an ID and a password as authentication data. At this request, the sales representative enters his or her ID and password previously assigned. When the sales representative is identified in the server 10, a login is executed.

When a login is made to the server 10, a main page (main screen or home page) for the sales representative is displayed. On the main page, at least an activity result input form for entering an activity result and an activity schedule input form for entering an activity schedule for the next

working day are displayed (see Fig. 4). As shown in Fig. 4, the activity schedule input form and the activity result input form are substantially the same. That is, the activity schedule input form entered yesterday is used today as the activity result input form.

The sales representative enters an activity result for the current day in the activity result column (1). Then, the sales representative enters the date of the next working day, and enters his or her business activity schedule in the activity schedule input form (tomorrow's visit schedule column (4)). The objects including the name of customer to be visited tomorrow and details of negotiation (when, where, with whom, what, how and to what extent) are entered into the activity schedule input form (document) on the browser. As required, the prepared activity schedule data are transmitted to the superior or the requesting locations. More specifically, all the details are automatically transmitted as an electronic mail to the superior and the requesting locations (additional destinations) by clicking a transmission button located at the lower end. The superior receiving the data can now peruse the received details directly on the screen. The superior having received activity schedule data from a subordinate confirms the received schedule, and as required, corrects the activity schedule through consultation with the sale representative. By correlating the number of visits to be customer and the profit in terms of causality, it is possible to discuss activities for improving quality and quantity of conducts to the customer previously with the superior.

After actual business activity carried out in accordance with the activity schedule prepared as described above, login is performed to the

server 10 in the same manner as described above to enter the activity result. The above-mentioned schedule of the activity schedule input form prepared during the last activity date is automatically reflected in the result column for today. If the schedule agrees with the result, therefore, filling the column with result is completed by pressing a prescribed button (result box). When a change occurs, preparation of a result report for the current date is completed by overwriting.

When entering an activity result, information not directly related to sales result such as customer information can be entered into a "report note column" (2) and a "bulletin board transmitting column" (3). Only the superior can peruse the contents of the "report note column", and information entered into the "bulletin board transmitting column" is stored in the server in a state in which it is perusable by all the sales representatives. All numerical data entered into the server 10 are automatically stored in the database for prescribed years as attributes of the personal ID. The stored numerical data are automatically reflected in conduct results for a certain period of time. On the other hand, all character data are automatically stored in the database for prescribed years as attributes of the personal ID. The stored data, after retrieval of details, are combined with necessary information, and the result is automatically or manually displayed on the bulletin board.

The customer evaluating method in the server 10 will now be described with reference to Fig. 5. The profit ratio (degree of contribution to profit) and the sales scale (degree of contribution to sales) of a customer are four-quadrant-analyzed to automatically determine priority for customers as

shown in Fig. 5. Taking into account the number of days of actual operation of business, a number of visits for a customer is automatically generated and set. As a result, it is possible to apply a unique portfolio for priority determination of customers, and thus to appropriately set priorities of customers.

The above-mentioned four-quadrant analysis (portfolio) is uniquely calculated with the following prerequisites:

- a) The ordinate represents the profit ratio (degree of contribution to profit) of the customer;
- b) The abscissa represents the sales scale (degree of contribution to sales) of the customer;
- c) Distribution graphs are prepared for the individual customers from the above-mentioned numerical values and a correlation formula is calculated at the same time;
- d) A reference equation is generated by means of the correlation formula (R square function);
- e) Four quadrants are generated around the point of intersection of the middle point of sales scale and the reference equation, to use as a judgment criterion; and
- f) The number of visits to be made during a certain period is calculated from the number of operating days of business on the basis of the above.

According to the above-mentioned customer evaluating method, it is possible to correct excess/shortage of activities by causing an image display for schedules and results of activities during a prescribed number of days. When the activity does not reach a prescribed level, an alarm can be

automatically displayed. A number of visits to be made to the customer during a certain period (four weeks) is set on the basis of the customer evaluation, and efficient visits to customers can be made by correlating the thus set number of visits with the activity schedule (activity plan) for the next working day. Conducts can be timely changed in response to the result.

The business activity management method of the present invention provides various derivative advantages by incorporating into business support software. For example, it is possible to automatically calculate an optimum visit sequence and time, and optimize the sequence of visits by linking customer entered in the visit schedule for the next working day with map information.

In the present invention, as described above, it is not to submit an activity report on what the reporter had done yesterday or today, but what should be done tomorrow (the next working day) (when, where, with whom, what, how and to what extent) is reported to the superior for liaison and consultation before the preceding day. More specifically, the contents of the daily report are changed from the conventional concept of recording the reflection for today to working out a plan as to what should be done "tomorrow". This makes it possible to previously discuss the matter with the superior to ensure effective business activity. By discussing how to change tomorrow before discussing past results with the superior, it is possible for the sales representative to change the manner of conducts and custom so as to take an effective counter-measure against problems or risk in advance. In contrast to the conventional practice of handwriting the report on a document, the method of the invention comprises entering online details

of daily report via a browser, the transmitting the contents timely to the superior and requesting locations, thus enabling to reduce the time for decision making.

According to the present invention, as described above in detail, the method of the invention is not limited to a report of past results as in the conventional art, but comprises preparing a schedule for tomorrow (the next working day), and report activity result on the basis of the prepared schedule. It is not therefore necessary to retrace past memory when preparing an activity result report, thus permitting reduction of the time required for reporting operation of activity result (daily report preparing operation). Since this is based on a method of reporting activity result on the basis of a prepared schedule, it is possible to improve reliability of data regarding the activity result. In addition, the sales representative must consider today what should be done tomorrow (the next working day), it is possible to improve the purpose consciousness of the sales representative and improve the contents (quality) of the business activities.

CLAIMS

1. A business management method for managing the situation of business activities, which:

enables each sales representative to previously prepare his or her own activity schedule for the next working day; and

after actual business activities, to prepare an activity result report with reference to said activity schedule already prepared.

2. A method according to claim 1, which enables each sales representative to prepare, in addition, a long-term activity schedule for a certain period of time, and to prepare said activity schedule for the next working day on the basis of said long-term schedule.

3. A method according to claim 2, wherein the period of said long-term schedule data is for four weeks.

4. A method according to claim 1, 2 or 3, which automatically performs evaluation of each customer on the basis of prescribed data, and makes data about said customer evaluation perusable by each of said sales representatives.

5. A computer used for a management system of the situation of business activities, comprising:

a personal data file capable of recording at least daily activity result

for each sales representative;

an activity schedule input form which is an input form for recording a schedule of business activities for the next working day and used for entering activity results;

an authentication file storing data for authenticating each sales representative; and

a processing unit which, when a sales representative makes a login to said computer by entering his or her authentication data, confirms that the sales representative is the person in question on the basis of the data stored in said authentication file, and permits login only in the case of the person in question.

6. A computer according to claim 5, which enables said sales representative to log in via internet.

7. A computer according to any one of claims 5 and 6, further comprising:

a common information file storing general data regarding business, in addition to said activity schedule and activity results, wherein:

data in said common information file are perusable by any sales representative other than the sales representative having entered the data.

8. A computer according to claim 5, 6 or 7, wherein:

long-term schedule data for a certain period of time can be recorded for each sales representative in said personal data file.

9. A computer according to claim 8, wherein said period for the long-term schedule data is set as four weeks.

10. A computer according to claim 5, 6, 7, 8 or 9, wherein:

said processing unit prepares customer evaluation data by automatically evaluating individual customers; and

said customer evaluation data are perusable by any of said sales representatives.

11. A software program comprising:

a step of requesting an accessing party to enter authentication data in the software used in a management system of the situation of business activities;

a step of authenticating login to the personal page of the person in question, on the basis of the authentication data entered in accordance with said request;

a step of displaying an input form for entering an activity schedule for the next working day for the sales representative himself or herself having performed login;

a step of storing said activity schedule entered in compliance with said input form;

a step of displaying an activity result input form for entering an actual activity result by use of said activity schedule; and

a step of storing the activity result entered in accordance with said

activity result input form.

12. A software program according to claim 11, wherein each said sales representative can perform login via internet.

13. A software program according to claim 11 or 12, wherein a step of preparing a common information file which stores general business data, in addition to said activity schedule and activity result, is executed; and

data in said common information file are stored and displayed in a state perusable by any sales representative other than the one having entered the data.

14. A software program according to claim 11, 12 or 13, wherein said personal data file can record long-term schedule data for a certain period of time for each sales representative.

15. A software program according to claim 14, wherein the period of said long-term schedule data is set to four weeks.

16. A software program according to claim 11, 12, 13, 14 or 15, further comprising a step of automatically evaluating each customer on the basis of prescribed information; wherein:

each of said sales representative can peruse data regarding said customer evaluation.