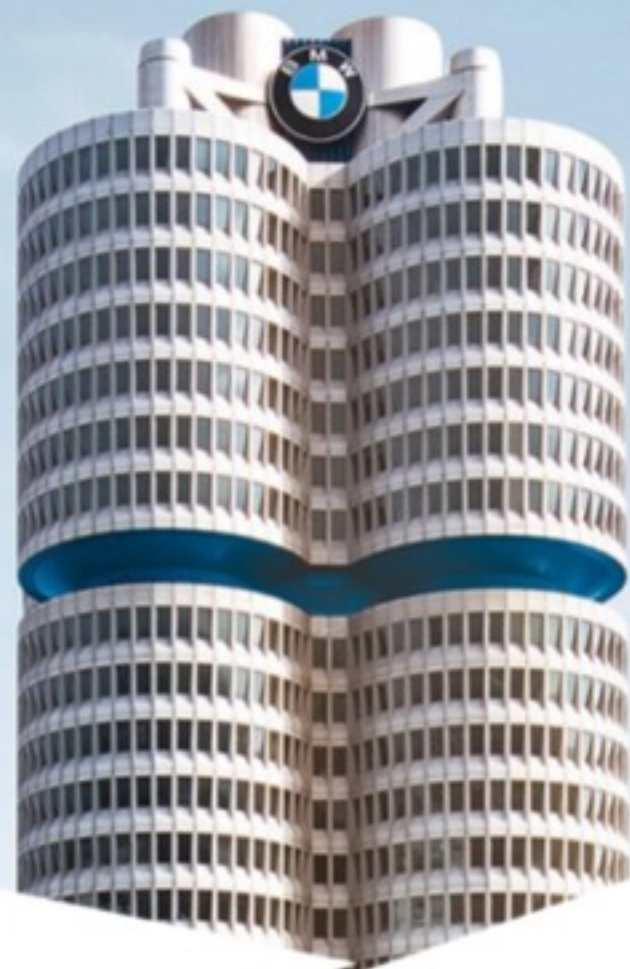




perfonu

ACTION TRACKING TOOL



Rolls-Royce
Motor Cars Limited

Work, Better, Together

For easy tasks tracking and efficient meetings



Don't forget anymore unfinished actions, don't waste your time in useless meetings discover a new way for teamwork and set up the best practices for a smart collaboration.



Perfony: your time saver

Perfony is an easy tool to plan and track actions to do. Each member of your team will have his own action plan and managers can follow up smart indicators for all projects. Perfony also gather a set of unique tools to allow managers to improve their meetings.



Enhance collaboration

- One place for all
- Promote valuable exchange
- Less emails
- Agile or ISO settings

Team mates involvement

Follow up projects

- Easy monitoring for your projects
- Simple tasks planning and sharing
- Audit of actions done
- Personalized views

No more action lost

Improve meetings

- Collaborative agenda
- Link projects and meetings
- Decision tracking
- Collaborative evaluation

Up to 30% time saved

30% Time saving

- Better and less meetings
- Easy access to information
- Integrated with Outlook and Teams

Better efficiency

- Personal to-do list
- Alerts system
- Deadlines compliance

Increase involvement

- Teammates empowerment
- Promotion of knowledge sharing
- Reward best practices

Products

Dynamic action plans and effective meetings



Azure France



Addin Teams



Addin Outlook



mobile App



iOS & Android



Voice recognition



Cognitive services

Products Dynamic action plans and effective meetings

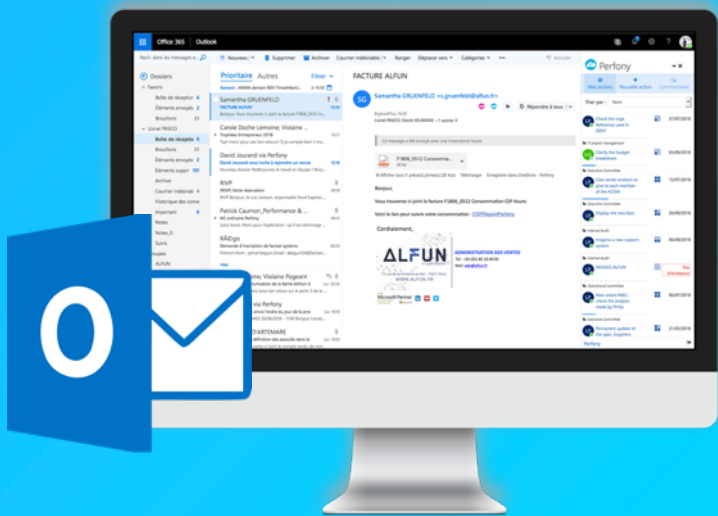


Web App

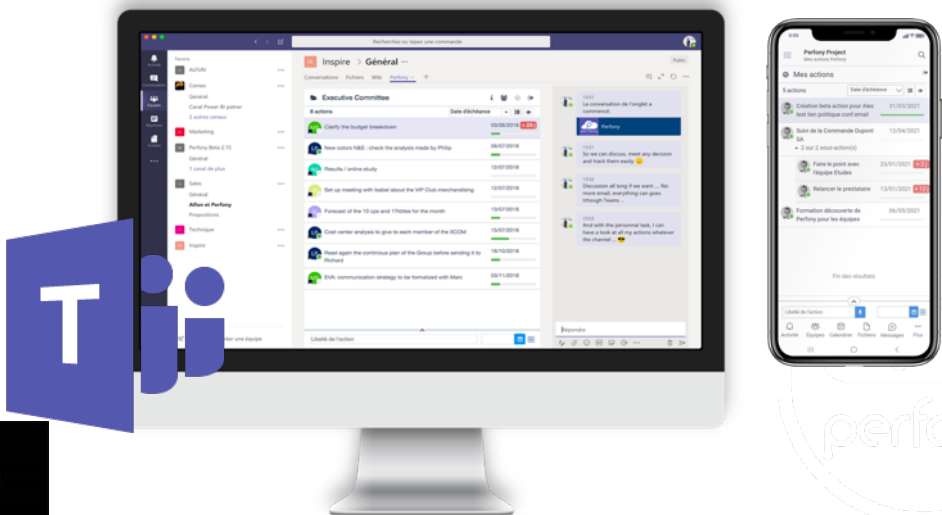


Mobile App

Outlook Addin



Teams Tab & personal task



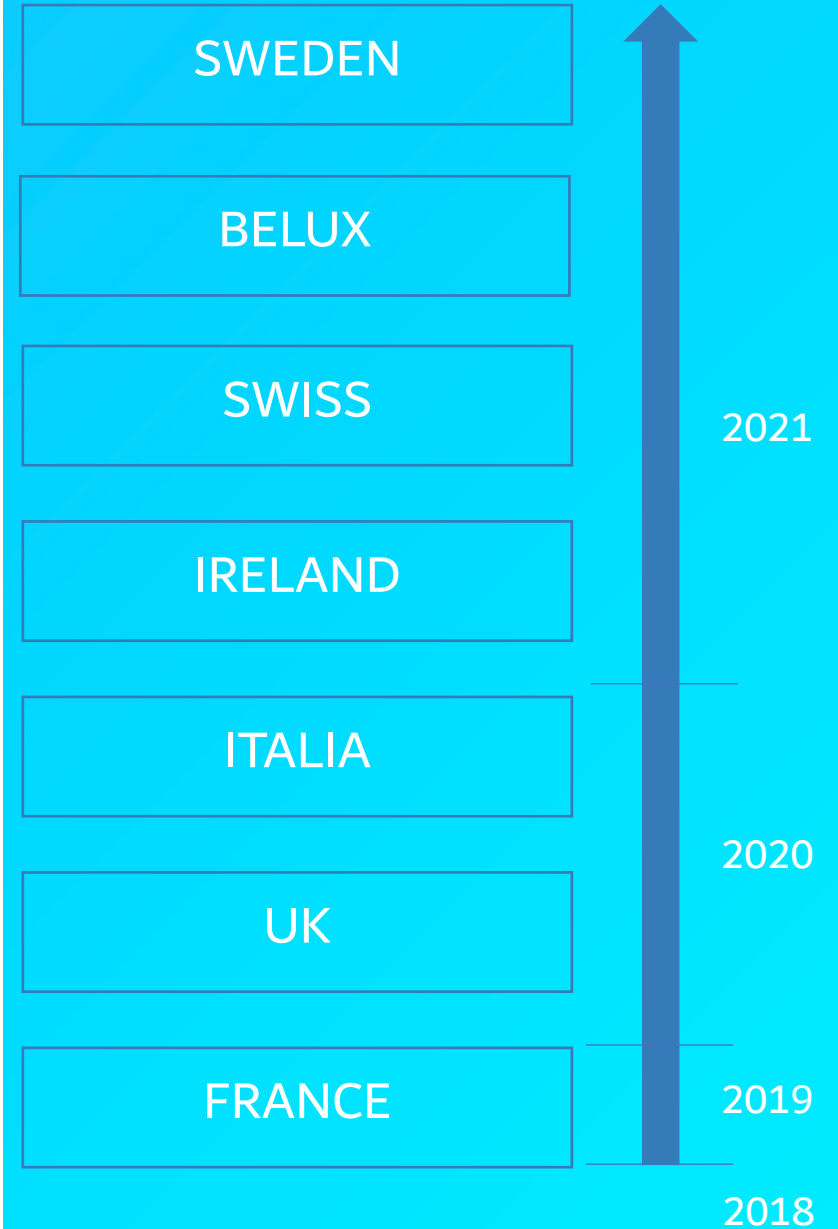
Microsoft Partner

Perfony & BMW

First with Motorrad France, then GPM, Financial services, Marketing ...



Over 3000 users





Suchen...



Lionel Pasco



Meine Mappen

abgerundete Anzeige

Country → Area →
Retailer

+ neue Mappe

LP	BMW France	0	0%	
LP	District 01	0	0%	
LP	32539 INDIGO JUVISY	11	42%	
LP	28150 BMW MINI PARIS	5	5%	
LP	33401 BMW MINI PARIS VELIZY	3	3%	
LP	District 02	0	0%	
LP	District 03	0	0%	
IF	BMW Italia	0	0%	
IF	Dealer	0	0%	
IF	Officina	0	0%	
MF	BMW UK	0	0%	
JR	Aftersales	0	0%	
SS	BMW Sales	0	0%	
SN	MINI Sales	0	0%	

32539 INDIGO JUVISY



Informationen

Teilnehmer

Aktionsplanen

Treffen

Dokument(e)



Die Aufgabe anzeigen

Fälligkeitsdatum

LP	802 - Have every sales rep update their numbers before they go home at night and talk through them during the sales meeting.	i	15/06/2020	+ 13 t	
JB	803 - Look for variances in sales funnel between individual sales reps and offer support, i.e. "how can I help you to get your appointments up?"	i	15/06/2020	+ 13 t	
JB	801 - Calculate the number of leads required based on current (or targeted) leads to sales ratio	i	25/06/2020	+ 3 t	
AD	797 - Sales Manager to compare monthly sales target vs. current estimate	i	28/06/2020		
LP	816 - Define sales target per sales adviser for the month of July	i	28/06/2020		
LP	805 - Contact remaining customers for appointment during dealership visit.	i	29/06/2020		
AD	806 - Have demo / service loaner ready when customer arrives	i	29/06/2020		
LP	804 - Sales Manager to contact lead prior to approving "lost" status	i	30/06/2020		
JB	798 - Create a rule in Outlook that replies get sent to a separate folder.	i	04/07/2020		
LP	799 - Sales Manager to compare monthly sales target vs. current estimate	i	04/07/2020		
LP	800 - Based on leads required, calculate the number of appointments, test drives and offers required on a daily basis.	i	zur Erinnerung		

Wortlaut des Aufgabs





Suchen...



Lionel Pasco



Meine Mappen

abgerundete Anzeige

Country → Area →
Retailer

+ neue Mappe

LP	BMW France	0	0%	
LP	District 01	0	0%	
LP	32539 INDIGO JUVISY	11	42%	
LP	28150 BMW MINI PARIS	5	5%	
LP	33401 BMW MINI PARIS VELIZY	3	3%	
LP	District 02	0	0%	
LP	District 03	0	0%	
IF	BMW Italia	0	0%	
IF	Dealer	0	0%	
IF	Officina	0	0%	
MF	BMW UK	0	0%	
JR	Aftersales	0	0%	
SS	BMW Sales	0	0%	
SN	MINI Sales	0	0%	

32539 INDIGO JUVISY



Informationen

Teilnehmer

Aktionsplanen

Treffen

Dokument(e)



Die Aufgabe anzeigen

Fälligkeitsdatum

- 802 - Have every sales rep update their numbers before they go home at night and talk through them during the sales meeting. 15/06/2020 +13 t
- 803 - Look for variances in sales funnel between individual sales reps and offer support, i.e. "how can I help you to get your appointments up?" 15/06/2020 +13 t
- 801 - Calculate the number of leads required based on current (or targeted) leads to sales ratio 25/06/2020 +3 t
- 897 - Sales Manager to compare monthly sales target vs. current estimate 28/06/2020
- 816 - Define sales target per sales adviser for the month of July 28/06/2020
- 805 - Contact remaining customers for appointment during dealership visit. 29/06/2020
 - 1. KPI : Increase YoY
 - 2. HOW : Service to Sales
 - 3. Current value : kein
 - 4. Objective value : kein
 - 5. Value month 1 : kein
 - 6. Value month 2 : kein
 - 7. Value quarter end : kein
 - 8. Impact : --
- 806 - Have demo / service loaner ready when customer arrives 29/06/2020
- 804 - Sales Manager to contact lead prior to approving "lost" status 30/06/2020
- 798 - Create a rule in Outlook that replies get sent to a separate folder. 04/07/2020

Wortlaut des Aufgabs

Easy for sales area managers: all actions per retailer

Action with specific
tag « GPM »



Suchen...



Lionel Pasco



Meine Mappen

abgerundete Anzeige

Name

+ neue Mappe

LP	BMW France	0	0%	
LP	District 01	0	0%	
LP	32539 INDIGO JUVISY	11	42%	
LP	28150 BMW MINI PARIS	5	5%	
LP	33401 BMW MINI PARIS VELIZY	3	3%	
LP	District 02	0	0%	
LP	District 03	0	0%	
IF	BMW Italia	0	0%	
IF	Dealer	0	0%	
IF	Officina	0	0%	
MF	BMW UK	0	0%	
JR	Aftersales	0	0%	
SS	BMW Sales	0	0%	
SN	MINI Sales	0	0%	

32539 INDIGO JUVISY

A tool for all GPM actions and more



Informationen

Teilnehmer

Aktionsplanen

Treffen

Dokument(e)

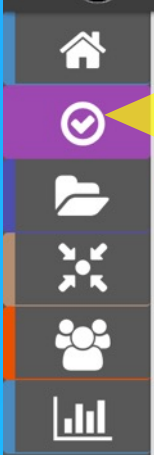


Die Aufgabe anzeigen

Fälligkeitsdatum

LP	802 - Have every sales rep update their numbers before they go home at night and talk through them during the sales meeting.	i	15/06/2020	+ 13 t	
JB	803 - Look for variances in sales funnel between individual sales reps and offer support, i.e. "how can I help you to get your appointments up?"	i	15/06/2020	+ 13 t	
JB	801 - Calculate the number of leads required based on current (or targeted) leads to sales ratio	i	25/06/2020	+ 3 t	
AD	797 - Sales Manager to compare monthly sales target vs. current estimate	i	28/06/2020		
LP	816 - Define sales target per sales adviser for the month of July	i	28/06/2020		
LP	805 - Contact remaining customers for appointment during dealership visit.	i	29/06/2020		
	1. KPI Increase YoY				
	2. HOW : Service to Sales				
	4. Objective value : kein				
	6. Value month 2 : kein				
	8. Impact : --				
AD	customer arrives	i	29/06/2020		
LP	approving "lost" status	i	30/06/2020		
JB	sent to a separate folder.	i	04/07/2020		

Wortlaut des Aufgabs



Meine Aufgaben

abgerundete Anzeige

Mappen

+ neuer Aufgab

32539 INDIGO JUVISY

799 - Sales Manager to compare monthly sales target vs. current estimate

04/07/2020

800 - Based on leads required, calculate the number of appointments, test drives and offers required on a daily basis.

802 - Have every sales rep update their numbers before they go home at night and talk through them during the sales meeting.

15/06/2020

+ 12 t

804 - Sales Manager to contact lead prior to approving "lost" status

30/06/2020

805 - Contact remaining customers for appointment during dealership visit.

29/06/2020

816 - Define sales target per sales adviser for the month of July

28/06/2020

1. KPI : --

2. HOW : Lead management / 1 : 1

3. Current value : kein

4. Objective value : kein

5. Value month 1 : kein

6. Value month 2 : kein

7. Value quarter end : kein

8. Impact : --

28150 BMW MINI PARIS

812 - Sales Manager to contact lead prior to approving "lost" status

30/06/2020

815 - Create a signature in Outlook that incorporates the Courtesy Note.

11/07/2020

33401 BMW MINI PARIS VELIZY

813 - Sales Manager to contact lead prior to approving "lost" status

30/06/2020

Ende der Ergebnisse

Wortlaut des Aufgabs

One click to get my actions

A toolbar to get all GPM actions

816 - Define sales target per sales adviser for the month of July

Informationen

Kommentare

Dokument(e)

Unteraufgabe

Geschichte

Revision

ursprüngliche Mappe : 32539 INDIGO JUVISY

übergeordneter Aufgab : kein übergeordneter Aufgab

Lionel Pasco Verantwortlicher(in)

kein Beteteiligter

1. KPI : --

2. HOW : Lead management / 1 : 1

3. Current value : kein

4. Objective value : --

5. Value month 1 : kein

6. Value month 2 : kein

7. Value quarter end : --

8. Impact : --

Business Sales

Retail Share of Target

GKL

BMW Segment Share in AOI

FS Retention

New Car Lead Conversion

Sales NPS

Erstellung : 27/06/2020 12:10:53

letzte Veränderung : 27/06/2020 12:24:45

All functionalities to manage and track action details



Search...



Lionel Pasco



Widgets



+ New dashboard

My actions

- 804 - Sales Manager to contact lead prior to approving "lost" status**
30/06/2020 > 99 d 32539 INDIGO JUVISY
- 813 - Sales Manager to contact lead prior to approving "lost" status**
30/06/2020 > 99 d 33401 BMW MINI PARIS VELIZY
- 812 - Sales Manager to contact lead prior to approving "lost" status**
30/06/2020 > 99 d 28150 BMW MINI PARIS
- 799 - Sales Manager to compare monthly sales target vs. current estimate**
04/07/2020 > 99 d 32539 INDIGO JUVISY
- 815 - Create a signature in Outlook that incorporates the Courtesy Note.**
11/07/2020 > 99 d 28150 BMW MINI PARIS

11 Actions that are late or without due date

New comments

- Used Car Stock Level**
Robert FRAME 11/03/2021 at 18:18:43
Clearly we need more imports to support profitability, lets set an action point to support this.
- Creation of new action for BMW Nordic**
Jon Rossiter 09/02/2021 at 11:23:07
Is really. done?

2 unread comment(s)

Actions to close

- 805 - Contact remaining customers for appointment during dealership visit.**
- 816 - Define sales target per sales adviser for the month of July**
3 over 3 sub-action(s)
- 1382 - eazrqfd**
- 1383 - eazrqedsf**
- 1384 - ezrqesdgfx**
- 1219 - Increase Accessories sales/Retail by establishing exchange between Sales & Aftersales**

9 action(s) to close

Personal widget to manage directly key information



Suchen...



Lionel Pasco



Analytisches Dashboard

Dashboard with analytics by Kpis and custom fields

+ Neues Dashboard

> Mappen-Aufgabe

Mappen ▾

☐ Gesamt	145	50	28	63
☐ BMW France	20	8		
☐ District 01	20	8		
☒ 32539 INDIGO JUVISY	12	6		
☐ 28150 BMW MINI PARIS	5			
☐ 33401 BMW MINI PARIS VELIZY	3			
☐ District 02	0			
☐ District 03	0			

> Filtern mit dem benutzerdefinierten Feld

1. KPI ▾

☒ Gesamt	12	5	6	1
☒ --	1	1		
☒ BMW Segment Share in AOI	2	1	1	
☒ Business Sales	2	1	1	
☒ FS Retention	1	1		
☒ GKL	1	1		
☒ Increase YoY	1	1		
☒ Motability Share of Target	1	1		
☒ New Car Lead Conversion	1	1		
☒ Retail Share of Target	1	1		
☒ Sales NPS	1	1		

> Filtern mit dem benutzerdefinierten Feld

2. HOW ▾

☒ Gesamt	12	5	6	1
☒ Courtesy Note	2	1	1	
☒ Digital	1	1		
☒ Lead generation	2	2		
☒ Lead management / 1 : 1	2	2		
☒ Retention	2	1	1	
☒ Service to Sales	2	1	1	
☒ VoC	1	1		

einen Bereich hinzufügen



Suchen...



Lionel Pasco



Tableau de bord Investissements Marketing BMW

Specific Dashboard with Graphics and figures

Dossiers

Sélectionner tout

- ☐ #NUMBER 1 - Catalogue d'actions
- ☐ ACTIONS GPM VENTES / APV
- ☐ CALL MARKETING / GRIM PASSIC
- ☐ PLAN MARKETING APRES-VENTE
- ☒ PLAN MARKETING BMW
- ☐ PLAN MARKETING MINI
- ☐ PLAN MARKETING NATIO BMW
- ☐ PLAN MARKETING NATIO MINI
- ☐ POINT MARKETING T1 / BAYERN
- ☐ POINT MARKETING T1 / NICE PRI
- ☐ TODO Martin Bossu
- ☐ Worklist Marketing Réseau

1. Activité BMW

Sélectionner tout

- ☐ Aucune valeur
- ☒ VN
- ☒ VO
- ☒ VAE

4. Modèles BMW

Désélectionner tout

- ☒ Aucune valeur
- ☒ Gamme
- ☒ GKL
- ☒ ///M
- ☒ xEV
- ☒ PHEV
- ☒ Série 1
- ☒ Série 2
- ☒ Série 3
- ☒ Série 4
- ☒ Série 5
- ☒ Série 6
- ☒ Série 7
- ☒ Série 8
- ☒ X 1
- ☒ X 2
- ☒ X 3
- ☒ X 4
- ☒ X 5
- ☒ X 6
- ☒ X 7

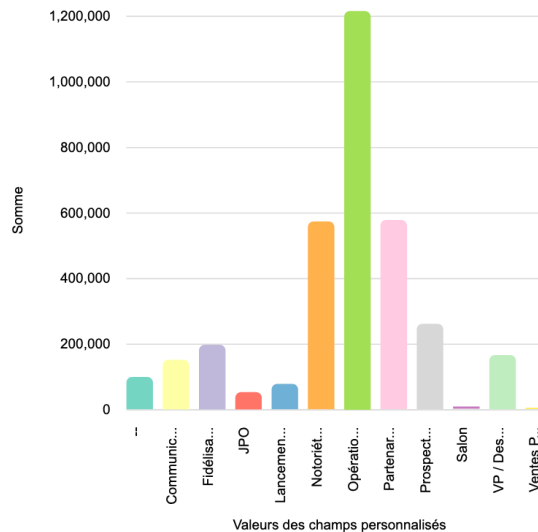
Echéances

Entre le

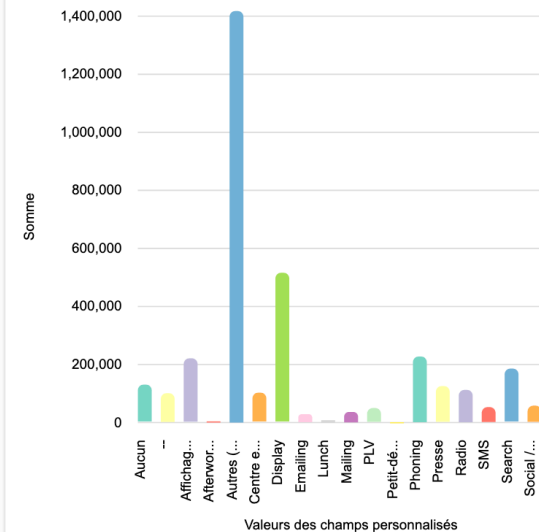
Investissements totaux en €

3 319 004

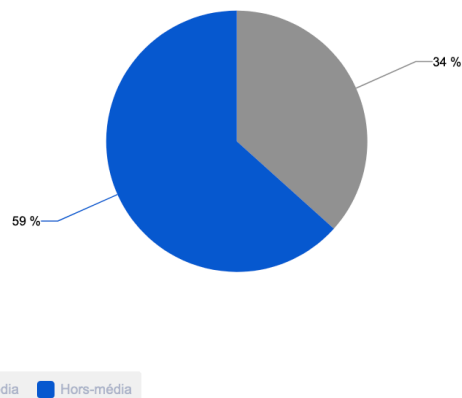
Investissements/catégorie en €



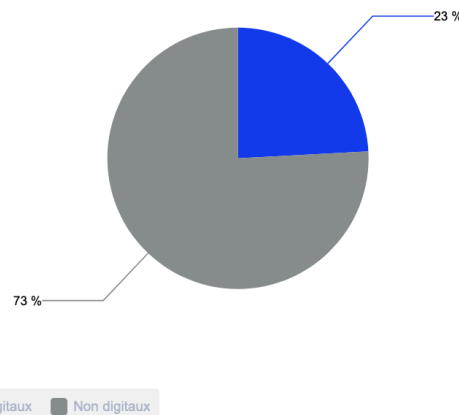
Investissements / type d'opérations en €



Investissements média/hors-média



Investissements digitaux





Suchen...



Lionel Pasco



Select the page you want to see

BMW

BMW

Dashboard

Market Share

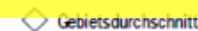
Targ

it Sheet

Lead Dash

board

Qlik Sense integration



Gebietsdurchschnitt



Top 25% der BMW Händlerbetriebe in Gebiet

Segment	Marktanteile BMW								Marktanteile Wettbewerb			
Privat	Zul. Privat ¹	MA Privat ¹	MA Privat vs. Gebiet		$\Delta\emptyset\text{GB}^2$		$\Delta\emptyset\text{Top 25\%}^2$		MA Privat ¹			
	Einh.	%	%		%-P.	Einh.	%-P.	Einh.	Audi, %	Mercedes, %		
	UKL2	3.664	8,0%	5,8%		17,2%	-2,1%	76	-5,6%	204	4,5%	26,3%
	KKL	1.131	5,1%	5,1%		14,4%	-5,2%	59	-8,7%	98	10,4%	44,9%
	MKL	454	11,9%	7,4%		24,3%	-3,0%	14	-9,2%	42	9,5%	63,7%
	GKL	76	3,9%	0,0%		10,5%	1,3%	-	-3,9%	3	2,6%	30,3%
	Total	5.325	7,7%	6,8%		16,4%		149		347	6,2%	33,5%
1-9	Zul. 1-9 ¹	MA 1-9 ¹	MA 1-9 vs. Gebiet		$\Delta\emptyset\text{GB}^2$		$\Delta\emptyset\text{Top 25\%}^2$		MA 1-9 ¹			
	Einh.	%	%		%-P.	Einh.	%-P.	Einh.	Audi, %	Mercedes, %		
	UKL2	785	12,5%	3,0%		19,2%	1,1%	-	-3,6%	28	8,9%	5,5%
	KKL	769	10,3%	3,0%		21,5%	-3,3%	26	-9,0%	69	13,5%	41,5%
	MKL	373	25,2%	16,0%		36,5%	1,2%	-	-6,9%	26	22,5%	33,2%
	GKL	69	4,3%	0,0%		20,0%	-2,4%	2	-12,3%	8	1,4%	39,1%
	Total	1.996	13,7%	5,6%		20,7%		28		131	13,0%	25,7%
10-49	Zul. 10-49 ¹	MA 10-49 ¹	MA 10-49 vs. Gebiet		$\Delta\emptyset\text{GB}^2$		$\Delta\emptyset\text{Top 25\%}^2$		MA 10-49 ¹			
	Einh.	%	%		%-P.	Einh.	%-P.	Einh.	Audi, %	Mercedes, %		
	UKL2	465	5,8%	5,0%		24,1%	-4,5%	21	-10,4%	48	6,9%	9,2%
	KKL	444	6,1%	4,7%		17,0%	-5,1%	23	-9,5%	42	24,3%	18,2%
	MKL	152	20,4%	17,9%		47,2%	-11,6%	18	-23,5%	36	33,6%	33,6%
	GKL	22	4,5%	0,0%		50,0%	-10,8%	2	-36,6%	8	13,6%	36,4%
	Total	1.083	7,9%	7,9%		21,0%		64		134	17,9%	16,9%

September 2017 - August 2018; Marktdaten enthalten kein UKL1 Segment

1 Bezogen auf UEB

2 Bezogen auf GLV-Gebiet



Suchen...



Lionel Pasco



Meine Treffen

Standardanzeige Pilot x

And also for your meetings

+ neues Treffen

Datum	Ausrichter	Titel	Ort	Beschreibung	Aufgabe	Tagesordnung	Fortgang	Teilnehmer	Kommentare	Dokument
12/02/2020 14:00-15:00	AD	Car dealership visit - 28150 BMW MINI PARIS		2		100%				
14/02/2020 14:00-15:00	AD	Car dealership visit - 32539 INDIGO JUVISY		0						

Dedicated templates
for your meetings

Minutes
of
meeting

Car dealership visit - 28150 BMW MINI PARIS - 12/02/2020 (14:00 to 15:00)

General information

Person responsible: Alexandre Dore
Time zone used in this PDF: Europe/Paris
Meeting date: 12/02/2020
Starting time: 14:00
Ending time: 15:00

Participants

JB Jonathan Bloys Participant (Present)
AD Alexandre Dore Person responsible (Present)

Agenda

14:00 - 14:15: Alexandre Dore Recruitment of a new marketing manager
Estimated duration: 15 min Actual duration: 0 min Priority: Priority
14:15 - 14:30: Jonathan Bloys Training on the new graphic charter
Estimated duration: 15 min Actual duration: 0 min Priority: Priority

Meeting minutes

Main indicators to date

Points +

Points -

Organization / HR

Miscellaneous / Open points

Documents

No document

Action plan (synthetic view)

484 - 14 TPE / PME prospecting plan
3 Activity Sales 2020 3 Category - 3 Special Project 3 TPE 5 KPIs objective: Alexandre Dore 88% 20/02/2020
not 6. Priority: -

485 - PROVIDE FOR THE HIRING OF A VO SELLER
3 Activity Marketing 3 Category Recruitment 3 Special Project - 5 KPIs Alexandre Dore 74% 27/02/2020
objective: not 6. Priority: Quality

Perfony & BMW Group

More than a simple action tracking tool



Not only an action tracking tool, Perfony is also a link between Department/Division/Field Force and enhances the collaborative work thanks to a dedicated communication platform

What's in it for me with Perfony:

GPM compliant

- Opportunity maps integrated (Qlik sense)
- Usefull for retailers (dealer network)
- Identify and share best practices
- Link between action and Kpis

And also

- BMW IT Compliant (security test/DPA UK)
- Get less e-mails
- Save up to 30% of time in managing actions
- Best practices for meetings and action tracking
- Usefull for all departments
- Two years of track record with BMW France



Perfony & BMW Group

More than a simple action tracking tool



- Sharing best practices
- Cross division
- Modern workplace
- From strategy to action
- Transparency



- Transparency
- Reporting in 1 click
- Information flow
- Harmonization
- Collect best practices
- Modern workplace
- Innovation at work
- BMW is a Tech Co
- Cobis substitute
- Microsoft Teams



perfony

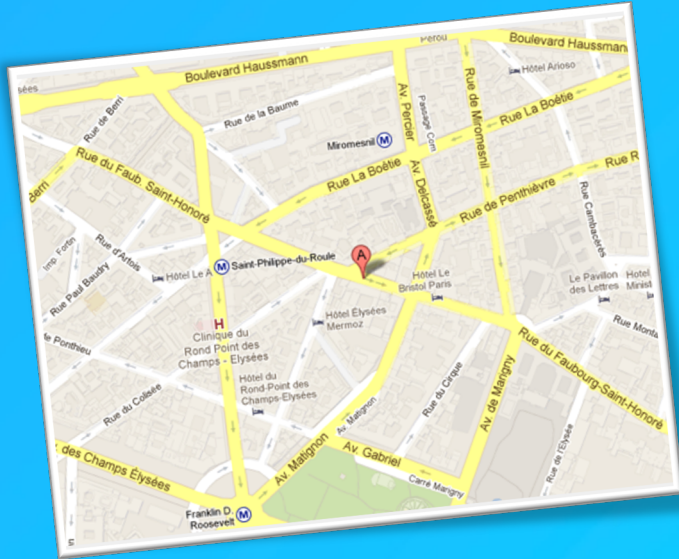


- One place for all actions
- Information flow
- Save time
- Modern workplace
- Operational
- One reporting tool

A field tool aligned with operational excellence standards

Data analysis available in one click

A team of experts at your service



Perfony

91 rue du Faubourg Saint Honoré

75008 Paris - FRANCE



Jonathan BLOYS

Sales

j.bloys@perfony.com

+33 6 25 26 32 26



Lionel PASCO

Operations

l.pasco@perfony.com

+33 6 25 26 32 22