



第十八届人力资源业务伙伴年会

2021年3月30-31日，上海





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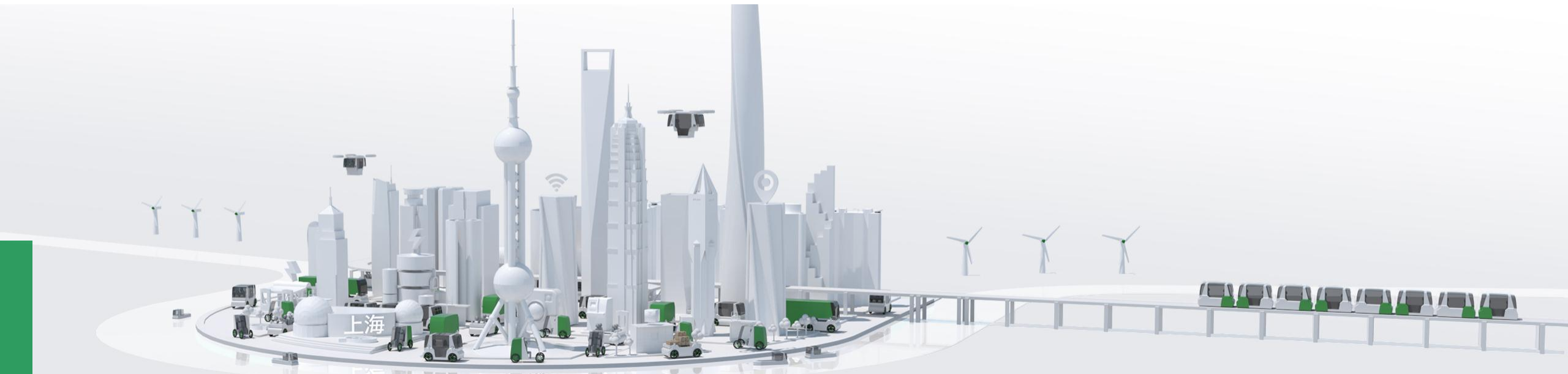
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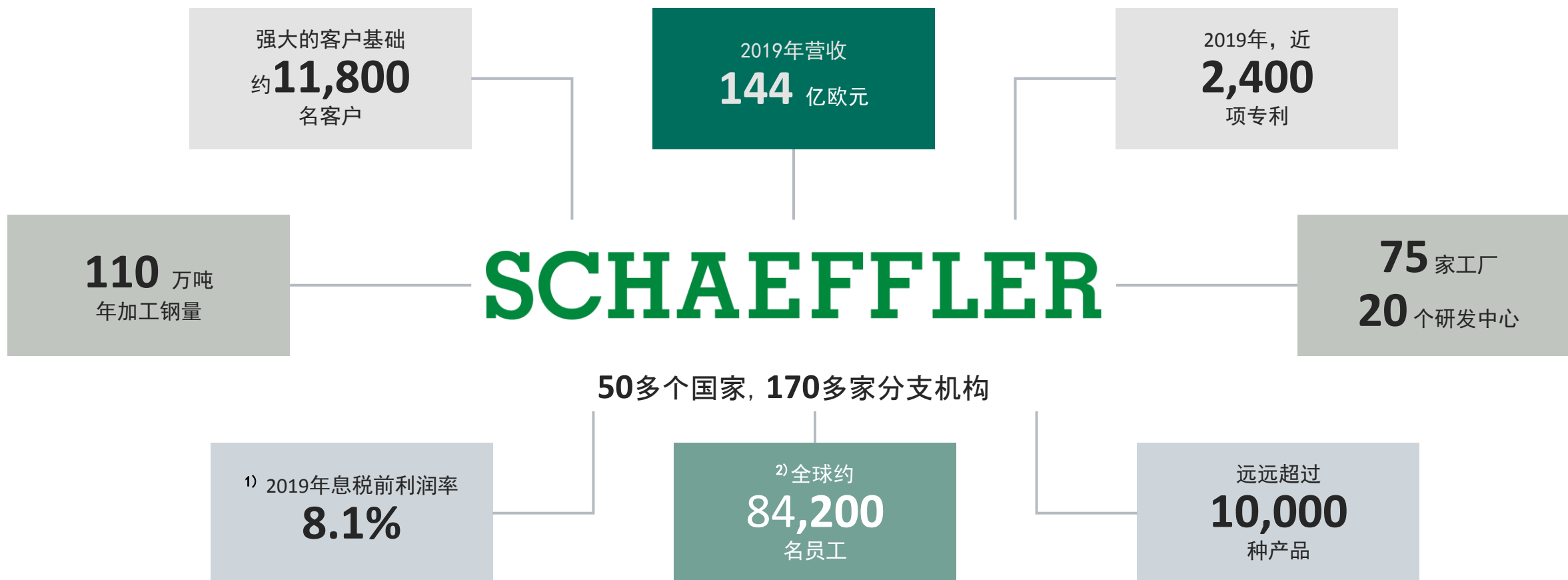
BP如何助力组织降本增效

— 舍弗勒工业实践分享

- 1 舍弗勒及工业简介
- 2 工业业务背景
- 3 组织效能提升实践
- 4 经验反思

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数据解读舍弗勒 – 强有力的起点



1) 不计特殊项目 | 2) 截止于2020年6月30日

近距离服务 – 全国布局

- 1995年开始在中国投资生产，目前拥有**10**座工厂、约**1.2万**名员工和**20**个销售及服务代表处。
- 大中华区总部位于上海安亭，在**太仓、南京、银川**和**苏州、湘潭**设有工厂。
- **安亭研发中心**是德国总部外最大的研发基地之一。在**湖南长沙**设有大中华区第二研发中心。

- ★ 研发中心: 2
- ▲ 培训中心: 4
- 工厂: 10
- 销售办事处: 20



汽车主机事业部 | 按系统分



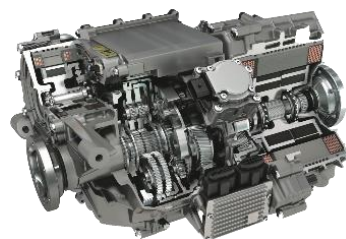
发动机系统



变速箱系统



底盘系统



混合动力和纯电驱动系统

汽车售后事业部 | 按部门分



乘用车



轻型商用车



重型商用车



拖拉机和农用车



售后服务

工业事业部 | 按行业分



风能



原材料



航天



铁路



非公路机械



两轮车



传动



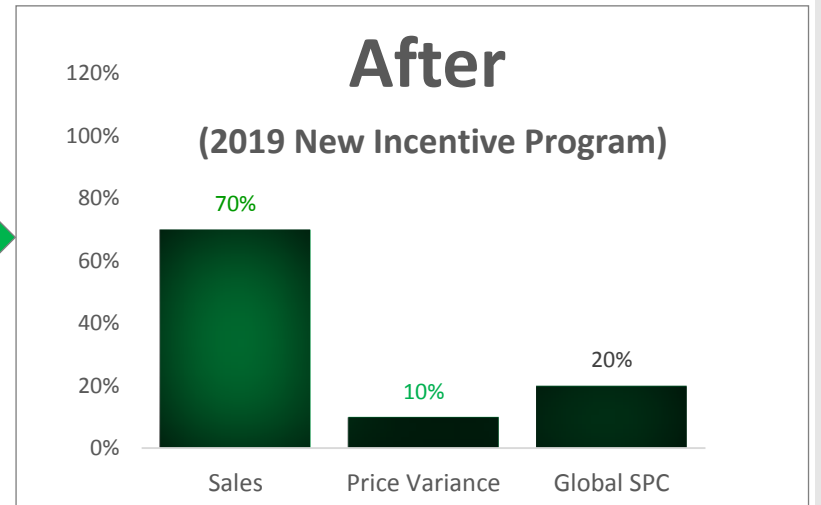
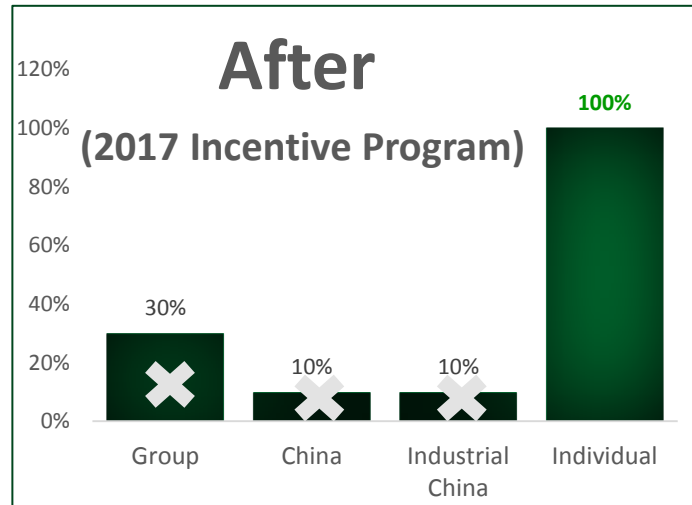
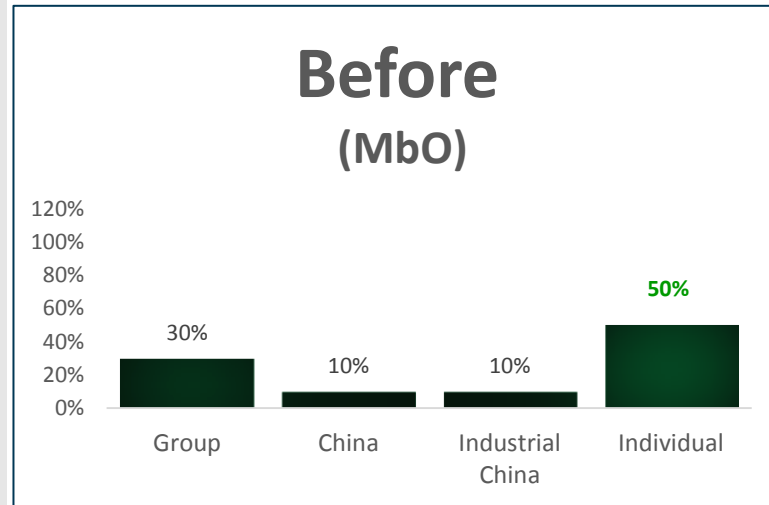
工业自动化

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- 2013-2015年舍弗勒工业业务发展缓慢且有下滑趋势
- 基于麦肯锡的报告，销售人员效率低于市场平均水平
- 内部技术支持团队（应用+TO）客户服务意识和效率需要进一步加强
- 技术支持团队工作量不均衡
- 销售工程师解决客户技术问题过度依赖内部技术人员

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Subproject: Incentive Plan to Sales Engineer		Project scope	
Project Goals	<ul style="list-style-type: none"> ▶ Set up a transparent, effective and fair Incentive Plan to build up the culture of “More Pay for More Work”; ▶ Enhance motivation to Sales Engineers to achieve Sales Targets; ▶ Distinguish high performer and to pay more for those Sales Engineers; ▶ Target people: Industrial Sales Engineers 	In Scope:	<ul style="list-style-type: none"> ▶ Target user is all Industrial Sales Engineers; ▶ Related parts are CMB, HR, Finance, Sectors, Business Support; R&D and AE.
Deliverables & KPIs	<ol style="list-style-type: none"> (1) Survey report (2Weeks: current status, existing problem and tactics); (2) Planning of Total reward package and fluctuated reward package (3Weeks: cost analysis of Sales Engineers reward); (3) Performance index and targets (3Weeks); (4) Reward rules (3Weeks: formula, data collection program and requirements, payment cycle and method, calculation method); (5) Communication meeting for all related employees. 	Out of Scope:	<ul style="list-style-type: none"> ▶ Basic Salary of Industrial Sales Engineers.
		Inter dependencies:	<ul style="list-style-type: none"> ▶ Industrial business departments (provide information for analysis and participate discussion); ▶ HR and Finance (Provide data, Calculation, Policy making); ▶ HQ/China PMO (keep communication and alignment)



Growth, Efficiency, Integration

▶ Growth

- ✓ Sustainable growth of Industrial business
- ✓ Profitable & quality growth
- ✓ **Engineering/Technical based Sales**



▶ Efficiency Improvement

- ✓ **Analysis and improve teams efficiency**
- ✓ Measure workload of technical force (AE&TO)
- ✓ Measure technical service usage status



▶ Integration

- ✓ **Enhance team integration** with different functions.
- ✓ Develop technical Competence of AE/TO & SE

$$\text{AE} + \text{TO} > 2$$



- Propose the **method & system** of describing & measurable workload for Application Engineer , Technical Office Team by project team.

- Define **evaluation mechanism** based on status quo & business requirements to improve organization efficiency and competence development.

Benefits to Organization

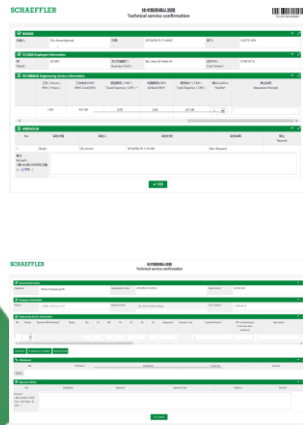
- ▶ **Visualization of technical capacity utilization** for workforce planning
- ▶ **Identification of high performer** for better employee performance management and motivation
- ▶ **Enhancement of technical cost awareness** for sustainable organization development (sustainability core value)
- ▶ **Sharing of Cross organization engineering capacity** for higher resource utilization efficiency

Benefits to Employee

- ▶ **More pay for more work:** more technical service provided to customer, the more payment the employee get
- ▶ **Technical skill upgrade:** both AE/TO and SE's technical skill will be enhanced with proper evaluation mechanism
- ▶ **Fairer promotion opportunities:** Key indicators will be applied
- ▶ **Recognized technical skill :** annual excellence award is subject to technical service amount and efficiency (CR% & Sales/TS Hour)

Sales Engineer & KAM & BD

Sales/TS Hour



- Require technical service from AE/TO for customers
- Confirm technical service hours in system

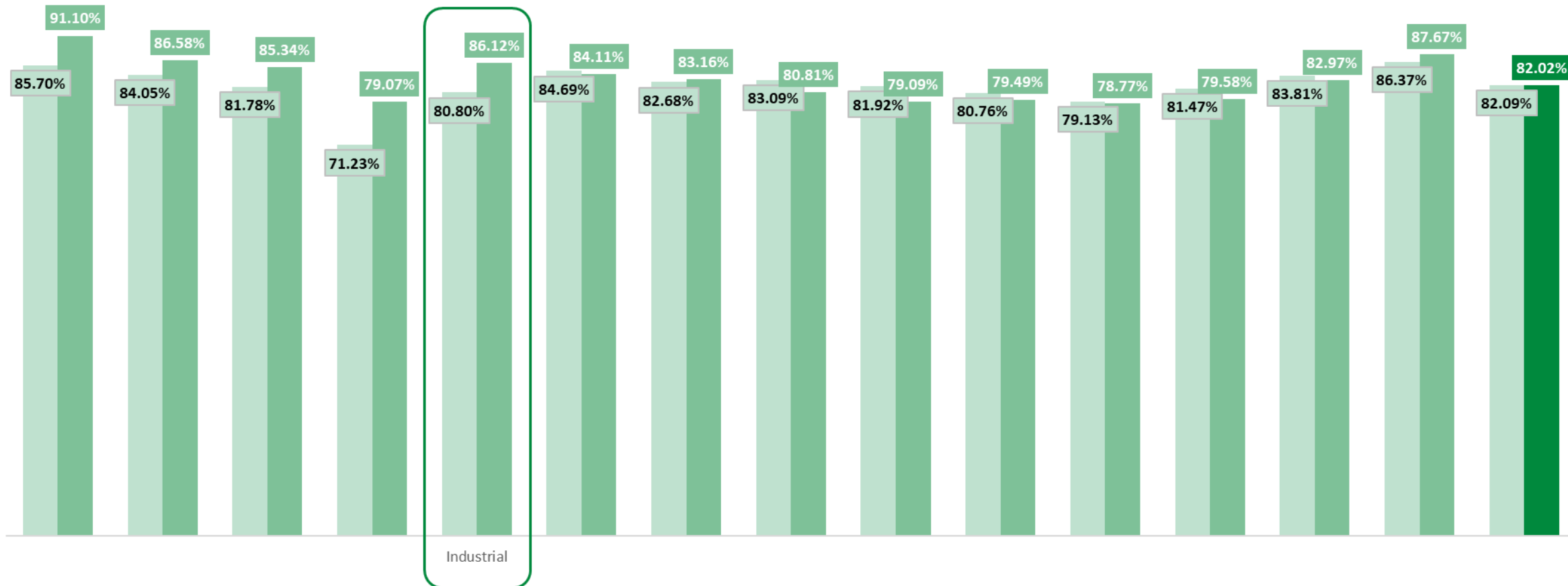
Technical Engineer (AE/TO)

CR%



- Accept technical service request from sales
- Put technical service hours with details (e.g. customer information, content) in system

Target Group	Indicator	Evaluation for Bonus
Evaluation for employee	Provider (AE & TO)	<p>CR%</p> <p>Satisfaction Rate%</p> <p>Bonus</p> <ul style="list-style-type: none"> - Linear target CR% & Customer Satisfaction Rate% set to STB (previous MbO) target with KPI 1: TE average CR% as 100% target (40% weight among personal part) $Y=X$ (max 150%) KPI 2: Customer Satisfaction Rate% (40% weight among personal part) on timely service and effectiveness $Y=X$ (max 150%)
	Requestors (SE)	<p>Sales/TS Hour</p> <p>Bonus (Sales Incentive for Sales)</p> <p>KPI : 5% in sales incentive integrated to sales target.</p>
	Requestors (LM & BD)	<p>N.A</p> <p>BU head /AE managers and TO head are responsible for confirmation of other service request from BD and other departments.</p>



Remark: 5 ratings are: 5-Strongly Agree, 4-Agree, 3-Neutral, 2-Disagree, 1-Strongly Disagree;
The Engagement rate calculates the total ratio of 4, 5 ratings

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挑战与困难

1. 合理的KPI和目标设定
2. 业务情况的变化 (plant change)
3. 行业特殊情况 (RV fright, price)
4. 员工的理解一致

成功因素

1. 管理团队的支持和参与
2. 总部的支持
3. 过程跟踪并优化
4. 持续沟通

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www.schaeffler.com

