

区域经理 KPI 指标评分说明

1. KPI 评分总表的评分计算方式

(1) Result in this Month 项目，应该填写该指标的实际完成情况值。再根据该实际完成情况值，对应到各个项目评分表格上的相应值的所能得到的评分，填写 Score for each KPI 栏目的得分（100 分制）。

KPI Matrix & Assessment 2023						
KPI Description	Appraiser	Weight	Result in this Month	Score for each KPI	Sales addon/minus	Jan
Reviewed and rated on a monthly basis						
Phoncall Answering Rate / 电话接听率 Scoring standard: the entire team's Phoncall Answering Rate should above 90%, 30 minute callback rate of 100% 评分基准：团队整体的电话接听率大于90%，30分钟回拨率100%	Regional vice Director	10%	需填写实际完成指标：多少百分比	80.0	2.0	82.00
Instant messaging/Online chat median reply time / 即时聊天平台平均回复时间 (Whatsapp, Facebook etc.) Scoring standard: Median reply time should lower than 15 minutes. 评分基准：median reply time低于15分钟。	Regional vice Director	5%	xx 分钟	70.8	1.5	72.30
Email first reply time median, full resolution time median / 邮件首次回复平均时间、完全解决平均时间 Scoring standard: First reply time median should controlled in 120 minutes; Full resolution time median should controlled in 15 hours. 评分基准：First reply time median低于120分钟，同时Full resolution time median低于15小时。	Regional vice Director	10%	xx 分钟	69.0	1.2	70.20
OSS warranty claim average dealing time / OSS质保申请平均处理时间 Scoring standard: OSS warranty claim average dealing time (including replace device, replace board, Onsite service), from the warranty claim form been created, to replacement or board sent, or onsite service had been carried out(Field Service Report been uploaded), should be controlled in 7(SEVEN) natural days. 评分标准：OSS质保流程（换机，换板，现场服务）平均处理时间，从客户提交申请到备件发货，或上传现场服务报告，控制在1周内（7个自然日）完成。	Regional vice Director	10%	5.6天	90.0	0.5	90.50

(2) Sales addon/minus, 是指销售对各个项目的加减分。Score for each KPI 栏目的得分（100 分制），加减销售对各个项目的评分，计算出某个月度该 KPI 项目的最终得分（月度的 KPI 得分栏，也是 100 分制）

(3) 某个月度所有 KPI 项目的最终得分，乘以各个项目相应的权重，再加减“客户或销售投诉”项的得分，即为当月 KPI 考核的总得分。

KPI Matrix & Assessment 2023						
KPI Description	Appraiser	Weight	Result in this Month	Score for each KPI	Sales addon/minus	Jan
Reviewed and rated on a monthly basis						
Zendesk CSAT / Zendesk满意度评价 Basic score of 100 points * Customer satisfaction evaluation percentage from Zendesk platform (phone, online chat, email); 基础分100分*来源于Zendesk平台的客户满意度评价百分率（电话、在线聊天，邮件）；	Department	10%		79.1		79.10
Customer or sales complaints (if any) 客户或销售投诉（如有） If complaints are received from customers or sales, and it is determined as after-sales responsibility, then 5 points will be deducted each time based on the number of times. Complaint related emails, screenshots, or documents are required. This including sales believing that the regional manager has unprofessional or negative behavior on the client side. 本区域收到客户或者销售的投诉，判定为售后责任的，按次数每次扣减5分。需有投诉相关邮件或截图或相关文档，包括销售认为区域经理在客户端有不专业或消极表现的行为等。	Department	0%	/	6.0	/	6.00
KPI Score = Sum (score for each item * weight)						78

2. 各明细表格的填写要求

(1) Customer Response Speed

该指标的 Phoncall answering Rate, 从 Zendesk 或电话平台上直接读取；Median reply time, first reply time median, full resolution time median, 均需从 Zendesk 平台上获取。根据获取到的实际值，结合 Scoring scheme 表格上对应的评分，来填写指标的相应得分。

Customer Response Speed								
Call response			Instant messaging/chat			Email response		
Month	Phonecall answering Rate	Score	Median reply time	Score	Email first reply time median	Email full resolution time median	Score	
January	84.20%	80						69
February								
March								
Phonecall answering Rate - Scoring scheme			Instant messaging/chat - Scoring scheme		Email Response - Scoring scheme			
Answering Rate	SCORE	Median reply time	SCORE	first reply time median	full resolution time median	SCORE		
If lower than 80%	60	If lower than 10 min	110	lower than 100 min, and	lowe than 12 hours	110		
80% - 85%	80	If lower than 12 min	105	100 min - 120 min, and	12 hours - 15 hours	90		
85% - 90%	85	12 min - 15 min	90	120 min - 150 min, or	15 hours - 18 hours	80		
90% - 95%	90	15 min - 18 min	80	150 min - 180 min, or	18 hours - 21 hours	70		
more than 95%	100	18 min - 21 min	70	more than 180 min, or	more than 21 hours	60		
		more than 21 min	60					

(2) OSS Warranty Claim following up speed

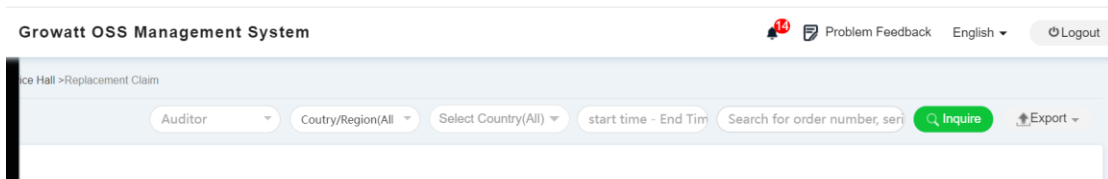
该指标的 KPI 描述为:

OSS warranty claim average dealing time / OSS 质保申请平均处理时间

Scoring standard: OSS warranty claim average dealing time (including replace device, replace board, Onsite service), from the warranty claim form been created, to replacement or board sent, or onsite service had been carried out(Field Service Report been uploaded), should be controlled in 7(SEVEN) natural days.

评分标准: OSS 质保流程(换机, 换板, 现场服务)平均处理时间, 从客户提交申请到备件备件发货, 或上传现场服务报告, 控制在 1 周内(7 个自然日)完成。

当前需要从 OSS, 导出评分月度的换机申请记录, 然后在导出的《OSS Big Complaints》表格上, 手工计算 OSS warranty claim average dealing time(replacement, board, onsite service)。



具体方式为: 用 “*现场服务或替换机发货日期 Attend Date or Replacement Send Date” 减去 “*申请日期 Claim Receive Date”, 即得出该换机申请案例的处理时间。月度的 OSS warranty claim average dealing time, 为该月度所有完成的换机申请的处理时间的平均值。

	A	B	C	AD	AE
1	*换机申请单号 Replacement request No.	*客服工程师 PIC	*申请日期 Claim Receive Date	*现场服务或替换机发货日期 Attend Date or Replacement Send Date	
2	2402211915965	GRT45029	2024-02-21 19:15:28	2024/2/25	3.2
3	2402211930861	GRT45029	2024-02-21 19:30:38	2024/2/26	4.2
4	240221170658	GRT48024	2024-02-21 20:20:57	2024-02-23	1.2

评分时, 首先需要填写计算出来的平均处理时间, 然后根据计算得到的实际值, 结合 Scoring scheme 表格上对应的评分, 来填写指标的相应得分。

	A	B	C
1	OSS Warranty Claim following up speed		
2	Month	OSS warranty claim average dealing time(replacement, board, onsite service)	Score
3	January	5.6天	90

(3) CUSTOMER VISIT RECORDS

需要在该 KPI 打分的明细页面，列出月度的拜访记录。另外需要附上拜访培训及总结的报告。

(4) Complaint issues following up and closing

本项目由客诉小组负责核算出区域的月度客诉结案率、总的客诉结案率数据，各区域依据客诉小组的客诉结案率数据来评分。

Complaint issues following up and closing				
Month	Complaints close rate - Your region	Complaints close rate - Complaint Dealing Center	Dividing result	Score
January	71%	71%	1.0	80.0
February			#DIV/0!	#DIV/0!
March			#DIV/0!	#DIV/0!
April			#DIV/0!	#DIV/0!

注意：

a)实际核算是的往前推 3 个月的月度的结案率（比如 1 月份开展 12 月的 KPI 考核，实际核算并记录 9 月份提交客诉的结案率）。

b) 评分是基于区域的结案率与总的结案率的对比值来衡量的。区域的结案率应不低于客诉跟进小组核算的整体结案率*1.1

(5) Technical document / Video documentation

本项目以在培训小组归档的 Technical document / Video 数量来计分。培训小组统一把控对技术文档、小视频的内容、格式的要求，文档由培训小组人员统一进行审核。只有培训小组接纳并按照部门内技术文档编码的规则编码并归档的资料，才能计入有效的 Technical document / Video 的数量。

培训小组将每月发布已审核并归档的文档（包含区域、文档名称、撰写人等信息），未审核通过的给出简要的说明理由，以便提交人员修改优化。

(6) Faulty inverter Return & Repair

质保申请与发货，依据月度服务记录来填写。

故障机是否返回的判定、返回情况，依据相应的文档记录汇总数据并填写。注意：本地提供故障机退返的判定记录，以及应退回故障机的退回情况记录。判定为不退回的不计入百分比核算。退回率倒推 3 个月统计。

Faulty inverter Return & Repair										
Month	Warranty Received	Replacement sent	Boards sent	Number of Field Service	Faulty inverters need to be returned	Faulty inverters returned	Return Percentage	Score	Repaired	Score
January										
February										
March										

(7) Team Working

Reporting submit Rate 指周报、月报的提交率。以月度为单位来核算。

Tasking Closing Rate 需要工程师岗位人员汇总其本人的月度的周报记录，检查各个事项的结案情况，核算相应数据并与区域经理确认。是否结案一般是基于区域经理与工程师每周的周例会等的沟通确认情况，原则上以区域经理个人的判定为准，遵循区域经理的判断来衡量、解释。

Skill developing 指组织团队成员开展内部培训会及本区域案例分享会的情况(每月 1 次)由大区负责人视开展情况和报告质量，给区域评分。

Team Working							
Month	Reporting submit Rate	Score	Tasking Closing Rate	Score	Skill developing	Score	Average Score (for the 3 parts)
January							
February							
March							
April							
May							
June							

(8) Customer Satisfaction

本项目基于 Zendesk、OSS 平台的客户满意度反馈项，满意度基于平台自动计算的数据记录。部分区域暂时无法核算的，可采用其它替换方式核算出的满意度。

Customer Satisfaction							
Items		Result(from Zendesk)		Details of Customer Complaint			
				Date	Name of Customer	Issues	To:(Team
Telephone service Satisfaction assessment result							
Online chat Satisfaction assessment result							
Email service Satisfaction assessment result							
Average Satisfaction result:							
Average Satisfaction Score(*100)							
Items		Result(from OSS)		Please use this form or attach a detailed form.			
OSS Warranty Replacing Satisfaction assessment result							
OSS Field servicing Satisfaction assessment result							
Average Satisfaction Score(*100)							

Details of Customer Complaint 是基于客户或销售投诉（如有）。本区域收到客户或者销售的投诉，判定为售后责任的，按次数每次扣减 5 分。需有投诉相关邮件或截图或相关文档，包括销售认为区域经理在客户端有不专业或消极表现的行为等。