

Budget Control app for Advertising and promotion

User Story:

In Consumer product business, Advertising and Consumer Promotion (A & CP) activities under which various cost will occur. Before each campaign, a budget will be decided by marketing department. Campaign cannot be saved if the overall budget of the department exceeds the yearly plan. Only if you have enough available budgets, campaign can be saved and subject for approval based on signing limit. Campaign can collect actual expense only if the campaign is approved. Currently in SAP, we have different transaction to create project, create budget, upload planed budget, approve budget, check budget workflow, commitment report, Accrual Report, so we need an application which will group all these activities for Advertising and Consumer Promotion. This app will use SAP PS in background.

This app will be helpful from marketing team to plan and use budget for their upcoming activities. They can have a clear visibility of used and available budget with more user friendly screen. From budget creator to budget approver can now use this app to track overall cost and plan future activity accordingly.

From Project creation, WBS (work breakdown structure) creation, then approval process, and at end the detailed cost estimating and control, for achieving these steps, currently we have multiple transaction code in SAP, so user has to go to different screens to achieve the activity which is very time tracking process. This app will give 360 degree view of total budget spend Advertising and Consumer Promotion activities.

This App will give over View of SAP Project and Portfolio Management. This App will allow to Create Project and Create Work Breakdown Structures. along with this , this will give view of all Project details such as Brand, Franchises, Profit center, department , approved budget and all WBS details such as WBS description , label, start & end date, approved budget and available budget. This APP also allows creating new WBS. There is also an option for mass upload of WBS element from file. Under Commitment tab this APP will give the Details of Purchase order or Sales order where WBS element has been used. If any WBS is under approval from high authority, then this APP will show the details under open Tab. At last there is also an option to send a communication message to Team at last tab.

This APP will help to manage Capacity and Workforce Planning, Financial Planning, Budget Management. While creating Sales order or Purchase order, this APP will be helpful to check which WBS to use and how much budget is available to be used.

Persona:



Persona Template



James

Marketing Specialist

“I would to utilize allocated budget fully to enhance my marketing goals in tiniest time”

ABOUT

35 Married with 5 Years in current organization in Marketing analyst role.

Target oriented, flexible and meeting with many people from different sectors.

WORKS WITH

Marketing Manager, Departmental Head and sales specialist

JOB RESPONSIBILITIES

- Liaising and networking with a range of stakeholders including customers, colleagues, suppliers and partner organizations;
- Communicating with target audiences and managing customer relationships;
- Sourcing advertising opportunities and placing adverts in the press or on the online media
- Budget management for Advertising and Consumer Promotion

NEEDS

- Need to track WBS available budget
- Need to upload project budget, create WBS element
- Need to find proper WBS which can be used in Sales order or purchase order
- Track and report of commitments

MAIN GOALS

- Involve in the details of all levels and aspects of marketing that include advertising, planning, sponsorship and public or media relations, distribution, research, product development, promotion, and more.
- Contribute to and develop integrated marketing campaigns. The amount and nature of responsibilities depend on the size of the sector and organization.

PAIN POINTS

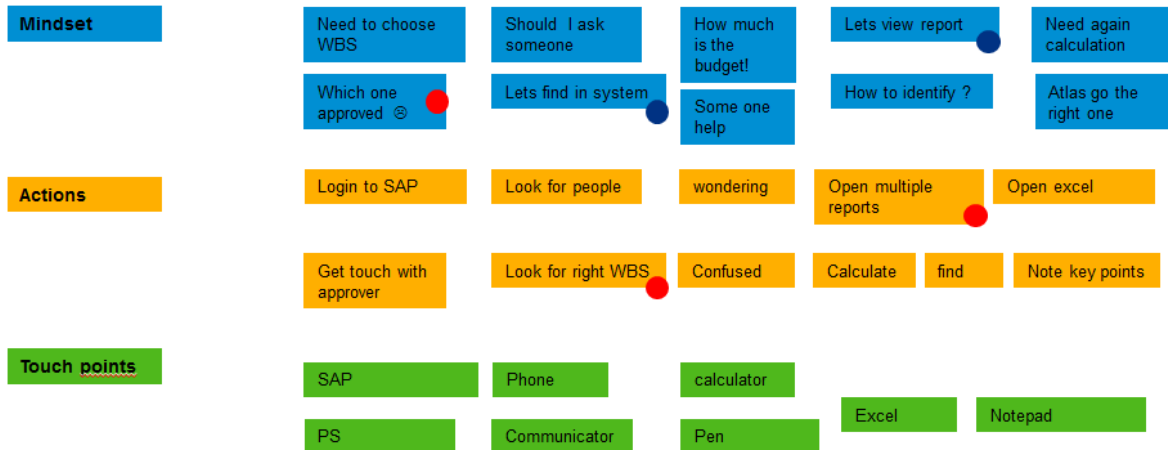
- Need one application which can solve all requirements
- Need to be user friendly and time saving

User Experience Journey

User Experience Journey 2

Current User Experience Journey

Duration of the Journey: 15 min



Point of View:

James , the marketing specialist needs a smart, quick and compact way for her budgeting planning on the go so that he can save time for other activities.

Mockup:

[Link to Mockup:](https://standard.experiencesplash.com:443/api/projects/549da4bd0b169f1b0baa59bd/prototype/snapshot/latest/index.html#/1458013893320_S0)

https://standard.experiencesplash.com:443/api/projects/549da4bd0b169f1b0baa59bd/prototype/snapshot/latest/index.html#/1458013893320_S0

Mockup App with Master and detailed view:

Budget Structure	Details																																								
<p>Search <input type="text"/></p> <p>Project Def USTMKT20160006 995000.00 USD Available Budget 988000 Man's Care Casual Ware</p> <p>Project Def USMKTG20160007 99855236 USD Attribute 1 Status 1 Attribute 2 Status 2</p> <p>Project Def USPMKT20160001 895521253 USD Attribute 1 Status 1 Attribute 2 Status 2</p> <p>Project Def USFLSL20160002 4588985231 USD Attribute 1 Status 1 Attribute 2 Status 2</p> <p>Create Project</p>	<p>Promotions Marketing - Men Wear</p> <p>USTMKT20160006 995000.00 USD Department: Trade Marketing Franchise: Man's Care Profit Center: 501811 Brand: Casual Ware</p> <p>Available Budget : 988000</p> <p>WBS Details</p> <table border="1"> <thead> <tr> <th>WBS Element</th> <th>Label</th> <th>Plan Budget</th> <th>Actual Budget</th> <th>Start Date</th> <th>End Date</th> <th>Status</th> <th></th> </tr> </thead> <tbody> <tr> <td>Marketing</td> <td>1</td> <td>995000.00 ...</td> <td>995000.00 ...</td> <td>01.01.2016</td> <td>31.12.2016</td> <td>Approved</td> <td>EDIT New WBS</td> </tr> <tr> <td>Actmedia Contract</td> <td>2</td> <td>100000.00 ...</td> <td>100000.00 ...</td> <td>02.01.2016</td> <td>30.04.2016</td> <td>Approved</td> <td>EDIT New WBS</td> </tr> <tr> <td>Brand Ambassador</td> <td>3</td> <td>15000.00 USD</td> <td>0 USD</td> <td>01.03.2016</td> <td>31.03.2016</td> <td>Under Approval</td> <td>EDIT</td> </tr> <tr> <td>Online Advertisement</td> <td>3</td> <td>50000.00 USD</td> <td>50000.00 USD</td> <td>01.03.2016</td> <td>31.03.2016</td> <td>Approved</td> <td>EDIT</td> </tr> </tbody> </table>	WBS Element	Label	Plan Budget	Actual Budget	Start Date	End Date	Status		Marketing	1	995000.00 ...	995000.00 ...	01.01.2016	31.12.2016	Approved	EDIT New WBS	Actmedia Contract	2	100000.00 ...	100000.00 ...	02.01.2016	30.04.2016	Approved	EDIT New WBS	Brand Ambassador	3	15000.00 USD	0 USD	01.03.2016	31.03.2016	Under Approval	EDIT	Online Advertisement	3	50000.00 USD	50000.00 USD	01.03.2016	31.03.2016	Approved	EDIT
WBS Element	Label	Plan Budget	Actual Budget	Start Date	End Date	Status																																			
Marketing	1	995000.00 ...	995000.00 ...	01.01.2016	31.12.2016	Approved	EDIT New WBS																																		
Actmedia Contract	2	100000.00 ...	100000.00 ...	02.01.2016	30.04.2016	Approved	EDIT New WBS																																		
Brand Ambassador	3	15000.00 USD	0 USD	01.03.2016	31.03.2016	Under Approval	EDIT																																		
Online Advertisement	3	50000.00 USD	50000.00 USD	01.03.2016	31.03.2016	Approved	EDIT																																		

Create new Project or WBS: This view will open either "Create project" or "New WBS" clicked.

Edit WBS: This option will open once EDIT button pressed on the WBS list details.

Under approval Details: Clicking on "Under Approval will open the popup details of the approver.

Project Def	WBS Element	Label	Plan Budget	Actual Budget	Start Date	End Date	Status	
USTMKTG20160007	Marketing	1	995000.00	995000.00	01.01.2016	31.12.2016	Approved	EDIT New WBS
	USTMKT20130006-1							
	Actmedia Contract	2	100000.00	100000.00	02.01.2016	30.04.2016	Approved	EDIT New WBS
	USTMKT20130006-1-1							
	Brand Ambassador	3	15000.00 USD	0 USD	01.03.2016	31.03.2016	Under Approval	EDIT
	USTMKT20130006-1-1-1							
	Online Advertisement	3	50000.00 USD	50000.00 USD	01.03.2016	31.03.2016	Approved	EDIT
	USTMKT20130006-1-1-2							

Commitments Details: This view will open once clicked on last line of WBS list.

Type	WBS	Price	Description
PO 8055652330	USTMKT20130006-1-1-2	1500.00 USD	Agency Fees
SO 5633232210	USTMKT20130006-1-1-2	1000.00 USD	Sample Products

SAP Web IDE App Prototype:

The screenshot displays the SAP Web IDE App Prototype interface. On the left, a 'Generated Group' is shown with a teal background and the text 'Generated Group' and 'Advertising Promotion'. On the right, the 'WBS Details' view is active, showing a list of projects and a table of WBS elements.

Projects List:

Project ID	Budget (USD)	Description
USTMKT20160006	995000.00	Trade Marketing
USTMKT20160007	60000.00	Promotional Sales
USTMKT20160008	45788.00	Season Sales

WBS List (4):

WBS Element	Label	Start Date	End Date	Status	Approved Budget (USD)	Available Budget (USD)	Action
Marketing	USTMKT20160006-1	01.01.2016	31.12.2016	Approved	995000.00 USD	960000.00 USD	Edit
Media Contract	USTMKT20160006-1-1	02.01.2016	31.07.2016	Approved	100000.00 USD	65000.00 USD	Edit
Brand Promo	USTMKT20160006-1-1-1	01.03.2016	30.05.2016	Under Approval	USD	USD	Edit
Online Add	USTMKT20160006-1-1-1	01.03.2016	30.05.2016	Approved	50000.00 USD	15000.00 USD	Edit

Master List (in red) view : Master page will show all Projects created under Advertising and Consumer Promotion group. This master page will show the project Budget along with description. There is also a button to create new project which works depends on the authorisation of user.

Details Header (in green) view : This view gives all detailed information for the project Brand, Franchises, Profit center, department , approved budget. There is also an option to mark as favorite.

The WBS Details list view (in blue) : "All WBS" is the default view here. This view gives all the WBS created for the selected project along with its description, label, start date , end date , status, approved and available budget. There is also an Edit button which can be used for any change required.

The screenshot shows the 'WBS Details' screen for project USTMKT20160006. The sidebar on the left lists three projects:

- USTMKT20160006: 995000.00 USD, Project Description: Trade Marketing
- USTMKT20160007: 60000.00 USD, Project Description: Promotional Sales
- USTMKT20160008: 45788.00 USD, Project Description: Season Sales

The main content area shows the 'WBS List (4)' table:

WBS Element	Label	Start Date	End Date	Status	Approved Budget	Available Budget	
Marketing USTMKT20160006-1	1	01.01.2016	31.12.2016	Approved	995000.00 USD	960000.00 USD	Edit
Media Contract USTMKT20160006-1-1	2	02.01.2016	31.07.2016	Approved	100000.00 USD	65000.00 USD	Edit
Brand Promo USTMKT20160006-1-1-1	3	01.03.2016	30.05.2016	Under Approval	USD	USD	Edit
Online Add USTMKT20160006-1-1-2	3	01.03.2016	30.05.2016	Approved	50000.00 USD	15000.00 USD	Edit

At the bottom of the main content area, there is a navigation bar with icons for: All WBS, New WBS, Mass Upload..., Commitments, Open, and Communicat... The 'New WBS' icon is highlighted with a red box in the original image.

Tab "New WBS" : This tab view will allow user to create new WBS.

The screenshot shows the 'WBS Details' screen with the 'New WBS' tab selected. The form contains the following fields:

- WBS Element:
- WBS Description:
- WBS Label:
- Start Date:
- End Date:
- Plan Budget:

At the bottom of the form is a green 'Save' button. A status bar at the very bottom indicates '1 WBS Under Approval'.

Tab "Mass Upload" : This option will allow user to mass upload multiple WBS from file.

← Projects (3) WBS Details

Search

USTMKT20160006 995000.00 USD
Project Description: Trade Marketing

USTMKT20160007 60000.00 USD
Project Description: Promotional Sales

USTMKT20160008 45788.00 USD
Project Description: Season Sales

★ Favorite
Franchise: Man's Care
Trade Marketing
USTMKT20160006 995000 USD
Brand: Casual Ware
Profit Center: 7766890
Department: Sales Marketing

All WBS New WBS Mass Upload... Commitments Open Communicat...

Attachments (1) +

WBS Mass Upload file
Wed Apr 20 2016 - My file

1 WBS Under Approval

Tab "Commitments" : Here details of Purchase order or Sales order will be shown where WBS element has been used. This will help user to analyse where the budget has spend.

← Projects (3) WBS Details

Search

USTMKT20160006 995000.00 USD
Project Description: Trade Marketing

USTMKT20160007 60000.00 USD
Project Description: Promotional Sales

USTMKT20160008 45788.00 USD
Project Description: Season Sales

★ Favorite
Franchise: Man's Care
Trade Marketing
USTMKT20160006 995000 USD
Brand: Casual Ware
Profit Center: 7766890
Department: Sales Marketing

All WBS New WBS Mass Upload... **Commitments** Open Communicat...

Type	WBS	Description	Amount	Number
Purchase Order	USTMKT20160006-1-1-2	Agency Fees	20000 USD	80004521255
Sales Order	USTMKT20160006-1-1-2	Sample Products	15000 USD	70012155485

1 WBS Under Approval

Tab "Open" : This view will give the view which WBS is pending with whom from how many days. There also a information message below the view which show how many WBS is pending for approval.

← Projects (3) WBS Details

Search

USTMKT20160006 995000.00 USD
Project Description: Trade Marketing

USTMKT20160007 60000.00 USD
Project Description: Promotional Sales

USTMKT20160008 45788.00 USD
Project Description: Season Sales

★ Favorite
Franchise: Man's Care
Trade Marketing
USTMKT20160006 995000 USD
Brand: Casual Ware
Profit Center: 7766890
Department: Sales Marketing

All WBS New WBS Mass Upload... Commitments **Open** Communicat...

Jack M: USTMKT20160006-1-1-1
Waiting for Approval - March 02, 2016

1 WBS Under Approval

Tab "Communication": This an option to send a communication message to Team.

The screenshot displays a software interface with a left sidebar and a main content area. The sidebar, titled "Projects (3)", lists three projects:

Project ID	Amount (USD)	Project Description
USTMKT20160006	995000.00	Trade Marketing
USTMKT20160007	60000.00	Promotional Sales
USTMKT20160008	45788.00	Season Sales

The main content area, titled "WBS Details", shows details for the selected project (USTMKT20160006):

- Franchise: Man's Care
- Trade Marketing
- Brand: Casual Ware
- Amount: 995000 USD
- Profit Center: 7766890
- Department: Sales Marketing

A horizontal toolbar contains several icons: "All WBS", "New WBS", "Mass Upload...", "Commitments", "Open", and "Communicat...". The "Communicat..." tab is currently selected and highlighted in blue.

Below the toolbar is a text input field with a placeholder "Send communication to Team" and a right-pointing arrow button.

At the bottom, a status bar shows "1 WBS Under Approval" with an information icon and a close button.