



SALES FORCE TOOL -SCOPE

10TH August 2023

PREPARED BY:

HEMA'S ENTERPRISES PVT LTD

GREEN COLOUR – AUTO POPULATE

RED COLOUR – DROP DOWN

PROCESS 1: Process will be initiated by sales team.

PROCESS 2: sales team will manually add the details like S.NO, Date, Sales employee name, **Sales employee ID, Reporting Manager**, Client name, **Client ID**, Address, **Lead type, Type of service required**, expected no. of seats, Approx lead value in INR/Month, **Stage of leads**, If any deposit required, if yes-value in INR, Billable under, NDA status, Agreement status, agreement date, agreement period, on boarding date, billing model, if pay & collect model credit days.

PROCESS 3: Lead type – Hot, Cold.

Type of service required – BPO, KPO.

- **BPO** – Voice, Non Voice.
- Voice – In bound call, Out bound call.
- Non Voice – Chat process, social media support, Trancription, Form filling, Listing, Content writing, web designing, Packaging & designing, Virtual Audit, IT infra L1 & L2 help desk, Admin assistance travel help desk, Ecom listing service.
- **KPO** – HRSS –PAYROLL, HRSS – Recruitments, HRSS – SOURCING, Finance shared service, procurement shared service, stock audit, asset audit.

PROCESS 4: Stage of leads

- RFQ received (received date, expected closing date), Initial discussion done (MOM details), SLA to be received, SLA Received - **sales team**.
- Under review, SLA/Agreement signed - **Legal team**.
- ON Boarded, Project in live - **operation team**.
- Project closed, Lead closed - **sales team**.

PROCESS 5: In SLA/Agreement signed, need a document upload option for NDA, Agreement/SLA and it should be mandatory.

PROCESS 6: In ON Boarded, need a document upload option for GST certificate, PAN, Cheque leaf, MSME, establishment certificate, client on boarded form and it should be mandatory.

PROCESS 7: Project In Live need billable details format with headers like Billing Month, Client name, **Client ID**, Service, Service Month, No of FTE, Billable month, Approval from, Billed status(completed/not), If billed invoice no, Invoice uploaded from accounts team.

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PROCESS 8: Billable details will be uploaded by operation team later, it will move for their superior's approval→sales team approval→ account team→ again it will go back to sales team.

PROCESS 9: To share an invoice to customers' needs a **share** option in sales login which includes field to add mail ID with submit option.

PROCESS 10: Project Closed – when a Project of a short duration is taken from a client and if completed it will be closed, it needs BH approval and Sales Head approval→ Reason for closed, approved by.

PROCESS 11: Lead Closed – It will be initiated by Sales Team and need approval from sales head. If a Generated Lead does not move to Sales then it will be considered as lead closed→ Reason for closed, approved by.