SALES FORCE TOOL

REVISED SCOPE 2

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PREPARED BY

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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.
- While selecting BPO and KPO it need to auto fetch their respective heads name.

PROCESS 4: Stage of leads

- RFQ received (received date, expected closing date), Initial discussion done (MOM details), SLA to be received (remarks & date field), SLA Received (remarks & date field), Lead closed (reason for lead closed and approval from sales head) - **sales team.**
- SLA Under review (remarks & date field), Document upload option – Legal team.
- Document review (Document upload option) – **Revenue Assurance.**
- Approval (need an approval option) – CFO.
- SLA/Agreement signed (NDA, Agreement/SLA upload option) - Legal team.
- Project in live (With Location / OPS Manager/ No FTE, project live date) – **operation Head.**
- On Boarded (GST certificate, PAN, Cheque leaf, MSME, establishment certificate, client on boarded form) – Operation manager.
- Project Closed (reason for project closed and approval from operation, sales head).

PROCESS 5: Once Project is converted as live, billing process will be initiated**.**

PROCESS 6: In billing process (need to show entire live projects with the details filled by operation head).

PROCESS 7: Billable details need to be with Billing Month, Client name, **Client ID**, Service, Service Month, No of FTE, Billable Amount, Approval from, Billed status(completed/not), If billed invoice no, Invoice uploaded from accounts team.

PROCESS 8: Once the billable details filled it will be move for approval of operation head and then sales head.

PROCESS 9: After the approval, **Finance team** will add invoice details as invoice number and invoice document.

PROCESS 10: Then **Internal Audit team** will provide a QC clearance for the invoice details.

PROCESS 11: For **Revenue Assurance team** need to show the reports like leads pending with stage (Closed Leads), Projects (Live & Closed Projects), Billable VS Billed.