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SALES FORCE TOOL -SCOPE

10TH August 2023

PREPARED BY:

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**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, 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.

**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.

**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.