**J M Baxi**

Standard Operating Policy and Procedures

Pre Sales to Order Closure

**Introduction**

A standard operating policy & procedure (SOPP) is a set of step-by-step activities compiled by an organization to help workers carry out complex as well as standard routine operations. SOPPs help to achieve efficiency, quality output and uniformity of performance while contributing to efforts that lead to process excellence.

This SOPP aims to achieve the following objectives:

1. Act as a guide and reference document to stakeholders at all levels of the organization

2. Clearly communicate activities and help to achieve consistency in operational procedures

3. Create accountability by assigning responsibilities at each stage of the lifecycle

4. Aid governance by documenting auditable processes and detailing control elements at each stage of the lifecycle.

What is the Lifecycle and Process Tree?

Each SOPP follows the process tree hierarchy and covers a specific entire process.

- A process represents logical grouping of sub processes and provides detail at functional level

- A sub process represents grouping of similar activities

- An activity lists down specific tasks that have/are measurable, time bound, associated risks, mitigating controls and defined owners

The entire business lifecycle consists of several processes. An SOPP is tasked with the coverage of all sub process and activities applicable to a particular process.

Who are the Stakeholders for this SOPP?

This stakeholders for this SOPP shall primarily be activity owners and business units.

1. Activity owners (operating units) – Activity owners shall use this SOPP as a reference document while performing their activities daily.

2. Business units – Business units shall use the SOPP as a repository of all activities across the lifecycle. This will aid in identifying process improvement opportunities.

Who will use this SOPP?

This SOPP shall be used by stakeholders across the entire organization. Most notable shall be the following:

1. Risk and Governance units – Risk and Governance units shall reference the SOPP to review existing controls and test their   
 2. Auditors – Auditors shall use this SOPP to check adherence to defined processes and standards. The SOPP shall help them identify any deviations to defined processes  
  
  
How do you read the SOPP?

To read this SOPP, it is essential to understand the process lifecycle and its coverage. This SOPP is documented in a chronological order in line with the sequence of activities performed by activity owners. Therefore, it should be read as such.  
  
This SOPP also provides references to various organization level policies, checklists, reports etc. These have been appropriately referenced at applicable activities and attached as Annexures to this SOPP.  
Each activity has an activity owner assigned to it. An activity also has the following references against it:

* Performer – Person who will execute the activity.
* Frequency – Each activity has defined period.
* Template – Reference to any template (If Any)
* System / Manual reference – Each activity is performed either manually or rooted through system.

Organization structure

The organization structure defined in the SOPP is the structure defined at the functional level. 'Activity owners' are defined are defined are those who are responsible for performing the activity. 'Business Owners' are defined as those who have oversight and ultimate ownership for the activities.

Rules for this SOP

* SOPP will be reviewed every year and necessary changes if any will be updated.
* Any changes in SOPP will be made by authorized person and approved by xx.

Document review and approval.

Revision history

| **Version** | **Created By** | **Document Approved By** | **Date Approved** | **Revision** |
| --- | --- | --- | --- | --- |
| **XXX** | **HOD – Sales & BD / Terminal Head** | **National Sales Head/COE** | **Annual** | **XXX** |

| **SOPP Number** | 1 |
| --- | --- |
| **Applicable Entities** | |  |  | | --- | --- | | **Entity Type** | **Entity Name** | | Container Terminal | * Vishaka Container Terminal – VCTPL * Kandla Container Terminal – KICT * Haldia Container Terminal – HICT * Tuticorin Container Terminal – TICT * Paradip Multipurpose Clean Cargo Terminal – PICT (Container) * Nhava Sheva Distribution Terminal – NSDT (Container) | | ICD and CFS | * Delhi Inland Cargo Terminal – DICT * Vishaka Multipurpose Cargo Terminal – VCTCFS * Mumbai Container Freight Station - MICT | | Non-Container Terminal | * Paradip Multipurpose Clean Cargo Terminal – PICT (Cargo) * Nhava Sheva Distribution Terminal – NSDT | |
| **Process Owner** | Head of Sales & BD |
| **IT Applications** | |  |  | | --- | --- | | **Entity Name** | **System** | | VCTPL; VCTCFS; PICT; HICT; NSDT; KICT; TICT; MICT; DICT | SAP Hana | | VCTPL; VCTCFS; PICT; HICT; KICT; TICT; MICT; DICT | CRM Zoho | | VCTPL; VCTCFS; PICT; HICT; KICT; TICT; MICT; DICT | OKR – People’s Box | |
| **Guidelines / Policy reference** |  |
| **SOPP Cross References** |  |

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## Executive Summary

A Revenue SOPP outlines the steps and guidelines for managing and collecting income within an organization. It ensures consistency in invoicing, fee collection, and financial reporting. The SOPP helps streamline processes, reduce errors, and ensures compliance with financial policies, supporting accurate revenue tracking and accountability.

The Revenue SOPP aims to:

* Standardizes the process for invoicing and collecting revenue.
* Ensures accuracy and consistency in financial transactions.
* Establishes clear guidelines for revenue recognition and reporting.
* Reduces errors and discrepancies in income management.
* Promotes timely collection of payments and outstanding balances.
* Enhances transparency and accountability in financial operations.
* Ensures compliance with internal financial policies and external regulations.
* Streamlines communication between departments involved in revenue processes.
* Provides a clear framework for tracking and auditing revenue.

## Abbreviations and Definitions

|  |  |
| --- | --- |
| **Abbreviations** | **Details** |
| BDC | Business Development Center |
| CFS | Container Freight Station |
| COE | Chief Officer Excellence |
| COO | Chief Operating Officer |
| CRF | Customer Registration Form |
| DC | Delivery Challan |
| DGM/ AGM | Deputy/ Assistant General Manager |
| DOA | Delegation of Authority |
| DPR | Down Payment Receipt |
| DTR | Daily Terminal report |
| EBITA | Earnings Before Interest, Taxes, and Amortization. |
| EC | Executive Committee |
| F&A | Finance and Accounts |
| FY | Financial Year |
| FDS | Final Delivery System |
| GM | General Manager |
| GRN | Goods Receipt Note |
| HDC | Haldia Dock Complex |
| HO | Head Office |
| HOD | Head of Department |
| ICD | Inland Container depot |
| IRN | Invoice Reference Number |
| KPI | Key Performance Indicators |
| KYC | Know your customer |
| LEO | Let Export Order |
| LOA | Letter of Award |
| MDM | Master Data Management |
| MIS | Management Information |
| MLP | Minimum Level Productivity |
| MSME | Micro, Small, and Medium Enterprises |
| OOC | Out of Charge |
| OEM | Original Equipment Manufacturer |
| PAT | Profit after Tax |
| SRM | Supplier Relationship Management |
| SSR | Special Service request |
| SOF | Statement of Facts |
| SD | Security Deposit |
| SB | Shipping Bill |
| TAMP | Tariff Authority for Major Ports |
| TH | Terminal Head |
| TMS | Transport Management system |
| TOS | Terminal operating System |
| TSA | Transition Service agreement |
| VIA | Vessel Inducement Agreement |
| VP | Vice President |

1. **Company/ Entity:** Any references/ mention of “entity” or “company” in the SOP refers to “J M Baxi Ports and Logistics Pvt Ltd.”

## Organization Structure for – VCTPL & VCTCFS, PICT, NSDT – Container Specific, TICT & HICT

COO

National Sales Head

HOD –Sales & BDC

Executive - Sales & BDC

Manager - Sales & BDC

## Organization Structure for – KICT & MICT

## 

**COO**

**Terminal Head**

**National Head Container Sales**

Capt. Mohit C

**Head -**

**Sales & BD**

**Manager - Sales & BD**

**Executive - Sales & BD**

## Organization Structure for – DICT

COO

National Sales Head

HOD –Sales & BDC

Executive - Sales & BDC

Manager - Sales & BDC

## Organization Structure for – PICT, NSDT – Non Container Specific

COE

Executive - Sales & BDC

Manager - Sales & BDC

HOD –Sales & B

**Entity Designations:**

|  |  |  |
| --- | --- | --- |
| **Entity Actual Designations** | **Role** | **Level** |
| Executive/ Sr. Executive | Executive | L1 |
| Dy. Manager/Manager/ Sr. Manager/ GM | Manager | L2 |
| HOD – Sales & BD | User HOD/ Function HOD | L3 |
| Terminal Head/ Business Head | Terminal Head/ Business Head | L4 |

**Corporate Accounts Designations:**

|  |  |  |
| --- | --- | --- |
| **Entity Actual Designations** | **Role** | **Level** |
| Vice President/Sr. Vice President | National Sales Head / HOD – Commercial | L5 |
| COO / COE | Chief Operating Officer / Chief Operating Excellence | L6 |
| MD | Managing Director | L7 |

**Process Flow**



## Key Process Activities

1. **Sales Planning Activity and Budget Analysis**

**Process Narration**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Description** | **Responsibility** | **Accountability** | **Frequency** | **Manual/ System** |
| **1.1 Sales Planning**  Every year around Sept - Sales demand are forecasted through historical data review, Market industry trends and sales revenue targets are set. Based on the target’s volumes are projected, HOD – Sales & BD shares the projected volume with National Sales Head (Container) & COE (Non-Container) for budget compilation (Jan - Dec) | **HOD -Sales & BD / Terminal Head** | **National Sales Head / COE** | **Annual** | **Manual** |
| **1.2 Budget Compilation and Review**  Post review the same is compiled with COO and present to board for approval. Inputs suggested by the respective COO, CEO and COE are discussed with the entity and are incorporated by the HOD -Sales & BD / Terminal Head and shared for review.  Executive - Business Finance consolidates budgets of all the entities and prepares a consolidated budget that includes entity wise volume budget along with actionable, Key highlights, Export/Import projections, service wise projections, Key strategies, summary of new prospects, captive commodities, and opportunities. | **HOD -Sales & BD / Terminal Head** | **COO/COE** | **Annual** | **Manual** |
| **1.3 Presentation and approval**  Manager - Business Finance presents consolidated budget to COO (Container and Non-container) and COE (Non-container) and Group CFO. Group CFO then presents the consolidated budget to the Managing Director. Post approval, Managing Director presents the consolidated budget to the Board. | **HOD – Business Finance** | **COO/COE** | **Annual** | **Manual** |
| **1.4 Allocation of KPI/KRA (Key Performance Indicators/Key Risk Areas) based on Budget**  National sales head based on the budget sets Score Card Pillars that includes Goals, Scorecard, key results or areas, sub goals, sub goal weightage, metrics, and targets. Score Card Pillars includes the below.  Financial- Achieve targeted volume level, budgeted revenue targets, introduction to new shipping services, Sales realization improvisation.  Customer- Client retention, engagement with key stakeholders (Shipping Line's, CTO's, BCO, NVOCC's, ICD's)  Process - Improvisation of sales review process, establishment of market intelligence,  Learning/People such as resource planning, multiskilled work force planning  These are shared with HOD – Sales & BD where applicable KPI’s are detailed further. | **HOD – Sales & BD** | **National Sales Head/COO/COE** | **Annual** | **Manual** |
| **1.5 Allocation of Sub Goals based on Score Card Pillars**  HOD - Sales & BD further develops KPI's applicable to the respective region that includes detailed goals/KPI's for each score card and agrees with National Sales Head which includes the Score Card Pillar, Description, Start Date, End Date, Weightage, Subgoal, Description, Metric and Target. | **HOD – Sales & BD** | **National Sales Head/COO/COE** | **Annual** | **Manual** |
| **1.6 Allocation of KPI/KRA in Darwin Box for determination of Balance Score Card (BSC)**  Based on the agreed sub goals, HOD - Sales & BD uploads the Goals/KRA's in Darwin Box along with sub goal, timeline, achievement, weightage, status, and Score Card Pillar and same are used to monitor performance. Based on the same Annual Goals are set by National Sales Head in People Box and allocates the same to HOD - Sales & BD | **HOD – Sales & BD** | **National Sales Head/COO/COE** | **Annual** | **System** |
| **1.7 Allocation & review of Goals in People Box (OKR)**  Quarterly, Based on the agreed KPI's/KRA's National Sales Head/COO/COE sets goals in People Box to be achieved and allocates the same to HOD - Sales & BD that includes the financial, process goals with the start date, End date, Progress and Monthly breakdown.  All the set goals are reviewed by National Sales Head on Fortnightly basis. | **HOD – Sales & BD** | **National Sales Head/COO/COE** | **As & When** | **System** |
| **1.8 Review of Budget v/s Actual**  Every month, management performance review and meetings are performed track performance against sales targets and adjust forecasts and resource allocation as necessary. | **HOD -Sales & BD / Terminal Head** | **National Sales Head / COE** | **Monthly** | **Manual** |
| **1.9 Revision of Budget**  If demand forecasts are lower than anticipated, based on the review, new information, or performance gaps the sales budget are re-forecasted and options are evaluated to meet the targets. | **HOD -Sales & BD / Terminal Head** | **National Sales Head / COE** | **As & When** | **Manual** |

### Key Performance Indicators (KPI’s)

|  |  |
| --- | --- |
| **Attribute** | **Objective** |
| Market Share Growth | Assess the accuracy of market trends, customer needs, and competitor movements. |
| Sales Target Achievement Rate | Ensure the sales targets set are challenging yet achievable. |
| Resource Utilization Rate | Ensure that resources are optimally allocated to meet organizational needs. |
| Cross-Departmental Collaboration Rate | Ensure smooth collaboration between various departments involved in the process. |

1. **Identification of Customers, Services, Strategy and Evaluation**

**Process Narration**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Description** | **Responsibility** | **Accountability** | **Frequency** | **Manual/ System** |
| **2.1 Initial analysis and demand assessment**  To conduct a comprehensive market analysis, the team begins by examining the geographical landscape of the state, demand supply on land and seaside, geopolitical situation and the key industries operating within it. This includes identifying manufacturers, sourcing raw materials, and determining which products are in high demand on landscape of the state and hinterland. They also assess whether these products are intended for export or the domestic market, as well as tracking any by products. | **Exec/Manager -Sales & BD / Terminal Head** | **HOD -Sales & BD / COE** | **Annual** | **Manual** |
| **2.2 Initial Contact and Information Gathering**  Exec/Manager - Sales & BD / Terminal Head Conducts initial meetings through call, video, or in-person and gather preliminary data such as shipment volume, destinations, frequency, special requirements (temperature-controlled goods, hazardous materials, etc.) and understand key pain points or specific needs along with determining customer’s budget range and timeline.  Initial proposal document is prepared outlining the profile & Infrastructure, facilities, eco system and IT infrastructure along with hallmark and service profile of the entity. | **Exec/Manager -Sales & BD / Terminal Head** | **HOD -Sales & BD / COE** | **As & When** | **Manual** |
| **2.3 Initial Contact and Information Gathering - CRM**  Exec/Manager - Sales & BD collects all the cross vertical information from CRM Data Base from cross vertical functions for creation of new opportunity. Customer accounts along with details such as account status, type of customer, shipment types, layouts, contact details are captured | **Exec/Manager -Sales & BD / Terminal Head** | **HOD -Sales & BD / COE** | **As & When** | **Manual** |

### Key Performance Indicators (KPI’s)

|  |  |
| --- | --- |
| **Attribute** | **Objective** |
| Customer Segmentation Accuracy | Ensure the market is effectively segmented for targeted marketing and tailored services. |
| Retention Rate per Segment | To track customer retention for each segment and optimize efforts to increase loyalty among the most profitable segments. |
| Conversion Rate from Offer to Sale | To track the effectiveness of offers in converting prospects into paying customers, measuring how well the service offerings resonate with the target market. |
| Alignment of Strategy with Customer Needs | Ensure that the strategy developed is in tune with customer expectations and market trends, maximizing its potential for success. |

1. **Sales Enquiry Process**

**Process Narration**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Description** | **Responsibility** | **Accountability** | **Frequency** | **Manual/ System** |
| **3.1 Needs Assessment - Terminal**  Exec/Manager - Sales & BD / Terminal Head assesses customer needs such as Cargo to be handled, Customer expectations, current logistics challenges (e.g., delays, high costs, lack of visibility),scope of services needed (e.g., transportation, warehousing / Yard, customs brokerage, last-mile delivery) and understand any regulatory or compliance requirements relevant to the shipment along with Clarification of volume expectations, service-level agreements (SLAs), and reporting needs. | **Exec/Manager - Sales & BD** | **HOD -Sales & BD / Terminal Head** | **As & When** | **Manual** |
| **3.2 Needs Assessment - CFS & ICD**  The Business Development team receives and log inquiries from Customers (Custom House Agents (CHAs) and importers/exporters, Main line, BCO's) - All potential customer inclusion needs to be incorporated. Exec/Manager - Sales & BD assesses customer requirements thoroughly to understand their specific needs. | **Exec/Manager - Sales & BD** | **Exec/Manager-Sales & BD** | **As & When** | **Manual** |
| **3.3 Customer Lead Management - CRM**  A competition analysis sheet is prepared each month to track potential customers.  Based on the analysis, Exec/Manager - Sales & BD approaches potential customers by showcasing the unique services.  Exec/Manager - Sales & BD onboards customer in CRM along with all details, captures all meeting details such as location, creation, and title. All leads are managed where scoring criteria are defined based on the shipping volume, geographical location, engagement level and lead source.  Potential deals are entered into CRM along with ref, Account name, deal name, stages, creation date and preliminary proposals are prepared based on the same. | **Exec/Manager - Sales & BD** | **Exec/Manager-Sales & BD** | **As & When** | **Manual** |
| **3.4 Solution Scoping and Preliminary Proposal**  HOD - Sales & BD / Terminal Head defines the scope of services is prepared outlining the scope, service offerings, timeline, and pricing structure and a preliminary cost estimate based on volume, route, and special services required the same is sent for review to National Sales Head (Container) & COE (Non-Container) | **HOD-Sales & BD / Terminal Head** | **National Sales Head / COE** | **As & When** | **Manual** |
| **3.5 Internal Review and Approval**  HOD - Sales & BD / Terminal Head ensures that the proposed solution is viable from both a business and operational standpoint and is reviewed on video call discussion with internal stakeholders (operations, finance, compliance, etc.) and adjust the solution based on internal feedback or concerns and obtain approval from National Sales Head (Container) & COE (Non- Container) for the proposed budget, timeline, and resources. | **HOD-Sales & BD / Terminal Head** | **National Sales Head / COE** | **As & When** | **Manual** |
| **3.6 Presentation to the Client**  HOD - Sales & BD / Terminal Head presents the proposed solution to the customer and refine the offering and schedule a presentation or demo with the customer that includes initial analysis, demand assessment, and proposed solution.  Any client questions or concerns regarding the solution and feedback are considered and the proposal is refined further and reviewed by National Sales Head (Container) & COE (Non- Container) | **HOD-Sales & BD / Terminal Head** | **National Sales Head / COE** | **As & When** | **Manual** |
| **3.7 Final Proposal and Handover to Terminal**  HOD - Sales & BD / Terminal Head finalizes the proposal and contract negotiations are held on below.  *Short term commercials/Existing customer Negotiations:*  Short-term commercials/ are agreed between the customer and HOD - Sales & BD & Terminal Head and are approved by National Sales Head.  *Long Term Contracts/New Customer (ICD, Rail, CFS, Container & Non-Container):*  All long-term contracts/New Customers where there is bigger volume are agreed between the customer and HOD - Sales & BD, HOD - Finance & Accounts, HOD - Operations & Terminal Head / Business Head and are approved by National Sales Head and COO/COE as per the DOA.  HOD - Sales & BD ensures that all necessary documentation (e.g., terms and conditions, service level agreements) is included and handovers the final proposal/ One Pager commercial document to the Terminal Head to begin contract execution. | **HOD-Sales & BD / Terminal Head** | **National Sales Head / COO / COE** | **As & When** | **Manual** |

### Key Performance Indicators (KPI’s)

|  |  |
| --- | --- |
| **Attribute** | **Objective** |
| Custom Pitch Effectiveness | Measure how well the customized pitch resonates with the prospect and leads to a positive response, increasing the likelihood of progressing to the next sales stage |
| Customer Satisfaction with Pitch | Assess how satisfied customers are with the tailored pitch, ensuring it addresses their needs and pain points, thereby increasing customer interest. |
| Objection Resolution Rate | Measure the success rate of overcoming customer objections, ensuring that most objections are effectively resolved to move the sale forward. A high resolution rate indicates strong objection-handling skills and can drive sales success. |
| Time to Resolve Objections | To track the average time it takes to handle objections, aiming to reduce this time to ensure a smooth and efficient sales process while not rushing the resolution. |
| Negotiation Success Rate | Measure the percentage of negotiations that result in a favorable outcome for the sales team, such as agreed terms, pricing, or contractual agreements, contributing to closing more deals. |

1. **Customer Onboarding Activity**

**Process Narration**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Description** | **Responsibility** | **Accountability** | **Frequency** | **Manual/ System** |
| **4.1 Terms of Contract**  Multiple rounds of negotiations (for rates, free storage period, credit period) are made with the customers before entering contract as per the above. On confirmation of both the parties, an email is sent by HOD - Sales & BD / Terminal Head to customer to state final terms of contract. | **HOD-Sales & BD / Terminal Head** | **National Sales Head / COE** | **As & When** | **Manual** |
| **4.2 Approval of Commercials**  Terms of contract (such as rates discounts, Volume discounts, free storage period, payment terms, credit period and credit limit) are approved as per the DOA.  *Short term commercials (ICD & CFS):*  Short-term commercials are agreed between the customer and HOD - Sales & BD & Terminal Head / Business Head and are approved by National Sales Head.  *Long Term Contracts (ICD, Rail, CFS, Container & Non-Container):*  All long-term contracts are agreed between the customer and HOD - Sales & BD, Terminal Head / Business Head and are approved by National Sales Head and COO/COE.  *Refer DOA (Revenue to Receivables)* | **HOD-Sales & BD / Terminal Head** | **National Sales Head / COO / COE** | **As & When** | **Manual** |
| **4.3 Drafting of Agreement**  Post confirmation from customer and approval as per DOA, Terminal Head in concurrence/cognizance of legal team drafts the agreement as per the format available (templates designed) and is jointly discussed with HOD - Sales & BD, HOD - Finance & Accounts, HOD - Operations. | **Terminal Head** | **National Sales Head / COE** | **As & When** | **Manual** |

1. **Monitoring Goals, KPI's and Customer Activities,**

**Process Narration**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Description** | **Responsibility** | **Accountability** | **Frequency** | **Manual/ System** |
| **5.1 Darwin box - BSC KPI Monitoring**  The Balanced Scorecard (BSC) in Darwin box is used to set business goals and KPI's to achieve volume targets set annually. OKR and performance management platform (People Box) is used that helps to streamline the implementation of OKRs for presales teams, ensuring alignment with business goals and measurable outcomes. | **HOD-Sales & BD / Terminal Head** | **National Sales Head / COE** | **As & When** | **System** |
| **5.2 OKR - Key Perspectives and Tracking**  OKR's with different perspective such as Financial, Customer and Internal Process are used that focus on goals related to achieving different targets such as Reduce the average proposal turnaround time, achieve accuracy, Increase quote-to-order conversion rate, Increase customer retention rate, Reduce response time to customer inquiries etc.  These are derived out of budget to achieve the set goal that can be financial or process driven goal | **HOD-Sales & BD / Terminal Head** | **National Sales Head / COE** | **As & When** | **System** |
| **5.3 Monitoring of customer activities**  Once the customer is added in CRM, HOD - Sales & BD will update estimated cargo to be handled every time, Exec/Manager - Sales & BD will add details such as estimated date of cargo, quantity to be handled, probability of cargo to be handled etc. At the end, AGM Sales will mark the specific deal as “Won” or “Lost” | **HOD-Sales & BD** | **National Sales Head / COE** | **As & When** | **System** |
| **5.4 CRM Hygiene and Pendency Monitoring**  Open leads are monitored where there is pendency for more than 3 months for terminals and 1-3 months for CFS/ICD. Exec/Manager - Sales & BD discusses the same with HOD - Sales & BD for further actionable | **HOD-Sales & BD / Terminal Head** | **National Sales Head / COE** | **As & When** | **System** |

### Key Performance Indicators (KPI’s)

|  |  |
| --- | --- |
| **Attribute** | **Objective** |
| Data Accuracy Rate | To ensure that the data within the CRM is accurate, which enables effective communication and decision-making. |
| OKR Alignment Rate | Ensure that CRM activities are aligned with organizational OKRs, helping to track whether sales and customer management activities support the company’s strategic goals. |
| Opportunity Conversion Rate | Measure the percentage of new opportunities that progress to the next stage (e.g., lead, proposal), indicating the effectiveness of the sales team in seizing opportunities quickly. |

1. **Post-Assessment and Continuous Improvement**

**Process Narration**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Description** | **Responsibility** | **Accountability** | **Frequency** | **Manual/ System** |
| **6.1 Management Process Review**  Exec/Manager - Sales & BD / Terminal Head evaluate the success of the initial analysis and demand assessment process and feedback from the customer on their experience. Document any lessons learned or areas for improvement in the process. HOD - Sales & BD / Terminal Head reviews and update templates, tools, and techniques used in the demand assessment phase.  Weekly review meetings are conducted on the same where along with above any new developments, sales calls are discussed. The discussion is attended by Exec/Manager -Sales & BD, HOD -Sales & BD and headed by National Sales Head.  Additionally, Monthly Review with Corporate are conducted at entity level - where brief on bushiness along with sales perspective, volume, revenue, operational KPI's, TAT of ships, productivity, Safety parameters (incidents) financials are discussed. The discussion is conducted between HOD - Sales & BD, HOD -Finance & Accounts and Terminal Head and headed by National Sales Head (Container) and COO / COE. | **HOD-Sales & BD & Terminal Head** | **National Sales Head / COO / COE** | **Weekly & monthly** | **Manual** |
| **6.2 Customer Feedback activities**  *For Container, ICD & CFS:*  On a quarterly basis, Exec - Sales & BD distributes a customer feedback form to all existing customers, including shipping lines, importers, and exporters. This form is either an online link created by the IT team or a physical copy, depending on the preferred method of feedback collection. After receiving the feedback from customer it discussed internally and necessary actions are taken. | **Exec/Manager -Sales & BD** | **National Sales Head** | **Quarterly** | **Manual** |
| **6.3 Lost Order Identification and Review**  Exec- Sales & BD / prepares the competition analysis sheet using the customer database and sales data to identify the reasons behind lost sales. This analysis is discussed every week (Mon) during a virtual meeting led by the HOD - Sales & BD / Terminal Head where the team collaborates to address the issues and develop effective solutions. mitigation to follow to save customers, volume etc. | **Exec/Manager -Sales & BD** | **HOD -Sales & BD / Terminal Head** | **As & When** | **Manual** |

### Key Performance Indicators (KPI’s)

|  |  |
| --- | --- |
| **Attribute** | **Objective** |
| Lost Order Rate | To track the percentage of opportunities or orders that were lost compared to the total number of opportunities, helping identify overall sales performance. |
| Feedback Response Rate | To measure how many customers provide feedback after losing an order, aiming for a high response rate to gather meaningful insights. |
| Time to Identify Root Cause | To monitor the time taken to identify the root causes after gathering feedback, ensuring a quick turnaround for process optimization. |
| Survey Response Rate | To measure the percentage of customers who complete the survey compared to the total number of customers asked to participate. A higher response rate indicates better customer engagement. |
| Survey Completion Time | To measure how long it takes for customers to complete the survey. Shorter times generally lead to higher completion rates without sacrificing feedback quality. |
| Complaint Resolution Time | To measure the time it takes to resolve a customer complaint from the moment it is received. A shorter resolution time leads to improved customer satisfaction. |
| Customer Satisfaction After Resolution | To measure how satisfied customers are after their complaints are resolved, providing insight into the effectiveness of the complaint resolution process. |

## Symbols/ legends used in flowcharts.

|  |  |
| --- | --- |
|  | Start/End |
|  | Manual process activity |
|  | Decision/possibility/alternative |
|  | Alternate process |
|  | Process connecting in same page |
|  | Process connecting in other page |
|  | Output document |
|  | Flow direction |