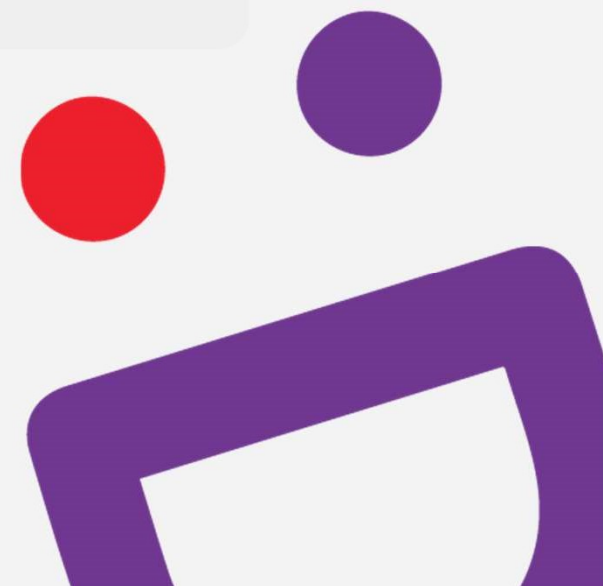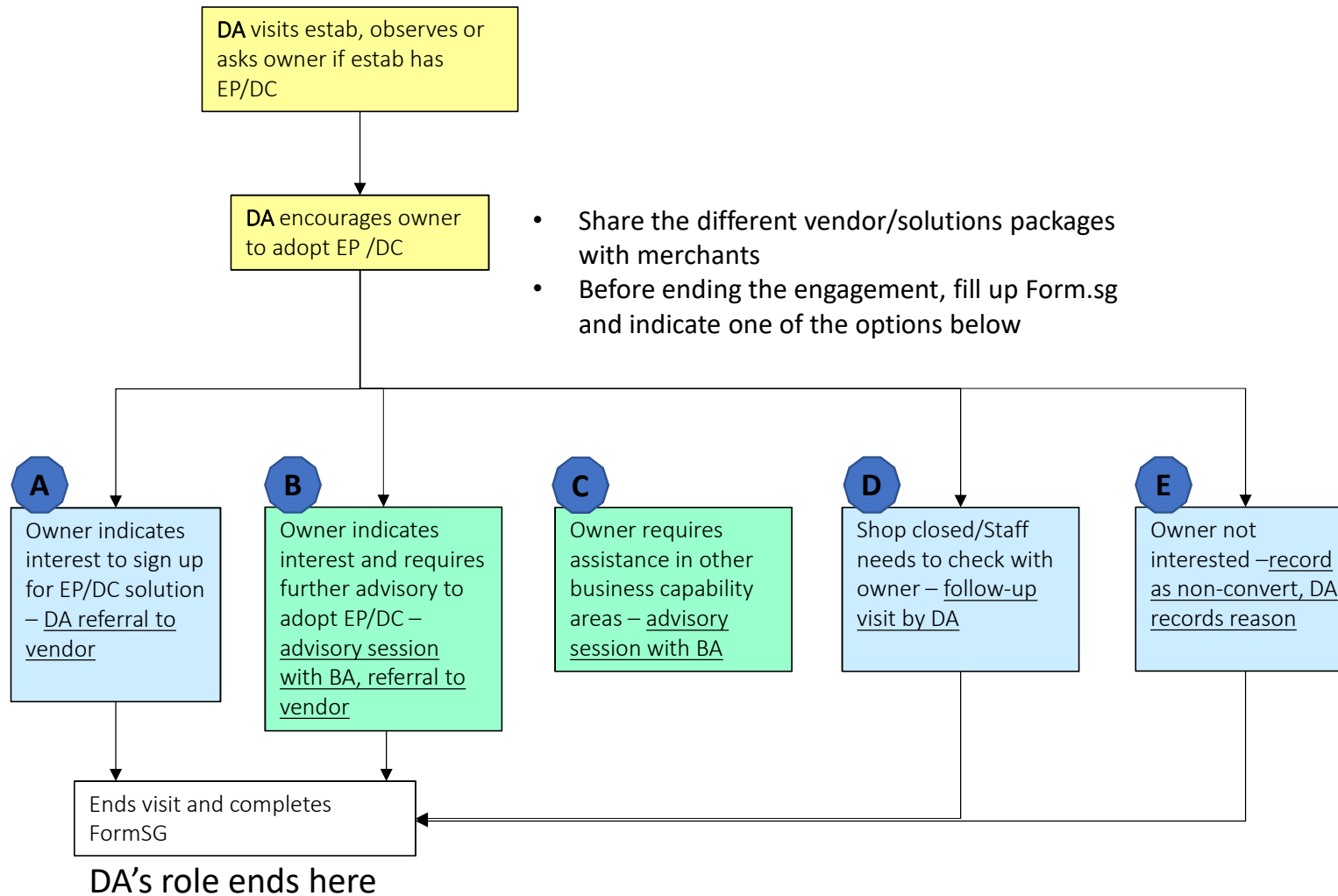# HEARTLAND GO DIGITAL
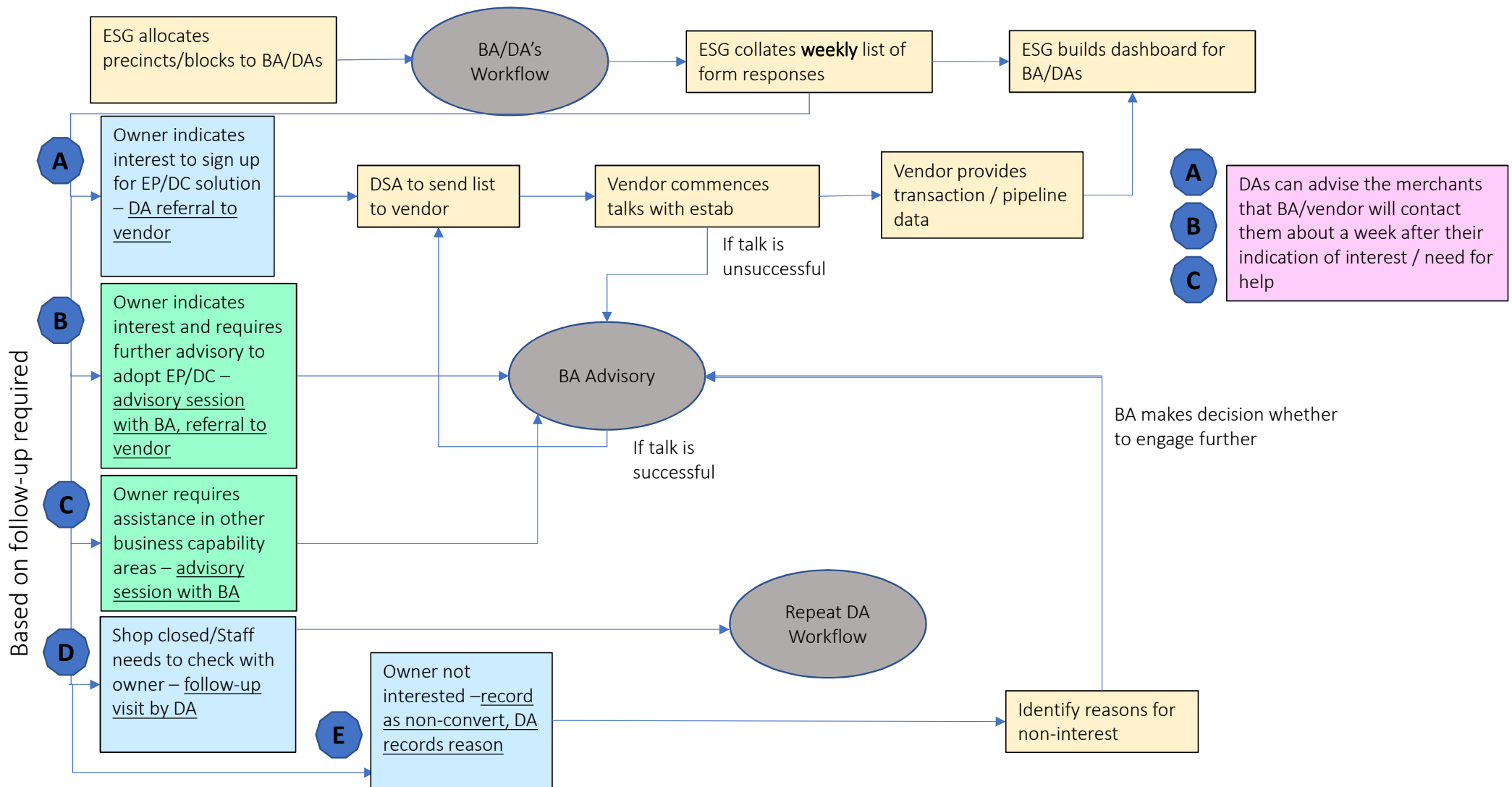
1. Engagement workflow for DA
2. Engagement for DA by each solution / vendor

General Workflow for DAs (Front-end)

DA visits estab, observes or asks owner if estab has EP/DC

↓

DA encourages owner to adopt EP /DC

- Share the different vendor/solutions packages with merchants
- Before ending the engagement, fill up Form.sg and indicate one of the options below

A
Owner indicates interest to sign up for EP/DC solution – <u>DA referral to vendor</u>

B
Owner indicates interest and requires further advisory to adopt EP/DC – <u>advisory session with BA, referral to vendor</u>

C
Owner requires assistance in other business capability areas – <u>advisory session with BA</u>

D
Shop closed/Staff needs to check with owner – <u>follow-up visit by DA</u>

E
Owner not interested –<u>record as non-convert, DA records reason</u>

Ends visit and completes FormSG

DA's role ends here

Workflow for Planning/Follow-up (Back-end)

ESG allocates precincts/blocks to BA/DAs → BA/DA's Workflow → ESG collates **weekly** list of form responses → ESG builds dashboard for BA/DAs

Based on follow-up required

A — Owner indicates interest to sign up for EP/DC solution – <u>DA referral to vendor</u>

DSA to send list to vendor → Vendor commences talks with estab → Vendor provides transaction / pipeline data

If talk is unsuccessful

B — Owner indicates interest and requires further advisory to adopt EP/DC – <u>advisory session with BA, referral to vendor</u>

C — Owner requires assistance in other business capability areas – <u>advisory session with BA</u>

BA Advisory

If talk is successful

BA makes decision whether to engage further

D — Shop closed/Staff needs to check with owner – <u>follow-up visit by DA</u>

Repeat DA Workflow

E — Owner not interested –<u>record as non-convert, DA records reason</u>

Identify reasons for non-interest

A
B
C
DAs can advise the merchants that BA/vendor will contact them about a week after their indication of interest / need for help

3

Engagement by DA for each solution/vendor

Digital Solution		Engagement by DA ends when:
• E-Payment • Digital Commerce	*fave*	Interest to sign up is indicated in FormSG
• E-Payment	Grab	Interest to sign up is indicated in FormSG **AND** direct merchant Grab's google form
• E-Payment	NETS	Interest to sign up is indicated in FormSG
• Digital Commerce	Shopee	Interest to sign up is indicated in FormSG
• Digital Commerce	carousell	Interest to sign up is indicated in FormSG **AND** direct merchant to Carousell Booster Package online application page