



Think you ^{really} know your
customer?

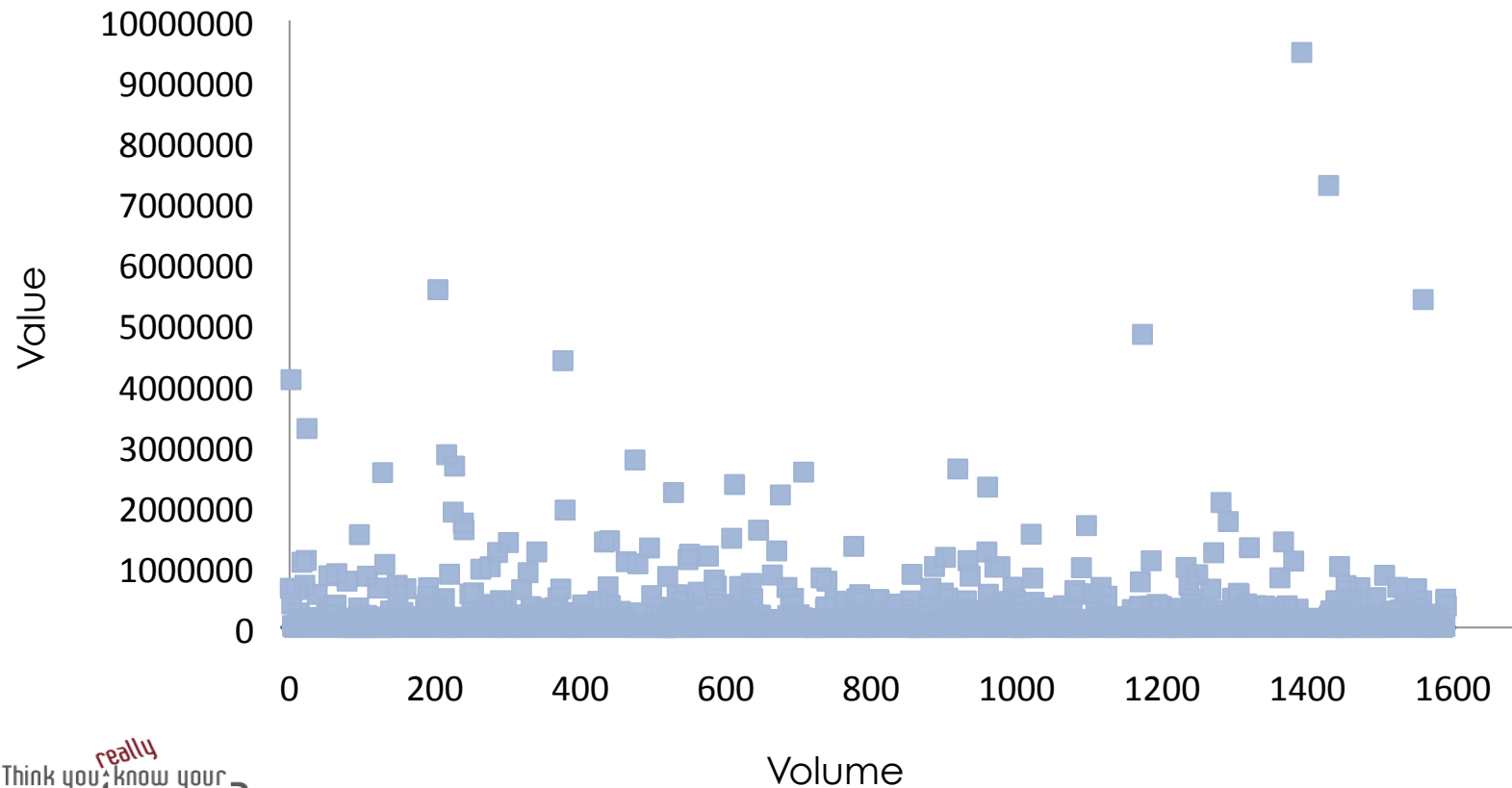
Channel Partners Engagement



[1] Data Insight

(based on sample data shared for OND'17 quarter)

Current Scenario



Large Numebr of

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01

**Total DSA 1593 V/s Total Revenue is 30 Cr
Average Volume is 20 and Value is 1.89L**



02

**5% DSA are Contributing More than 31% of the
business in value and 35% in Volume**



03

**Top Products : Two Wheeler, Motor & Health.
87% of DSA's are Selling less than 3 Products**



04

**83 DSA's are Top performers - Above Average in
Value ,Volume & sell multiple products**



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[1] Key Objective

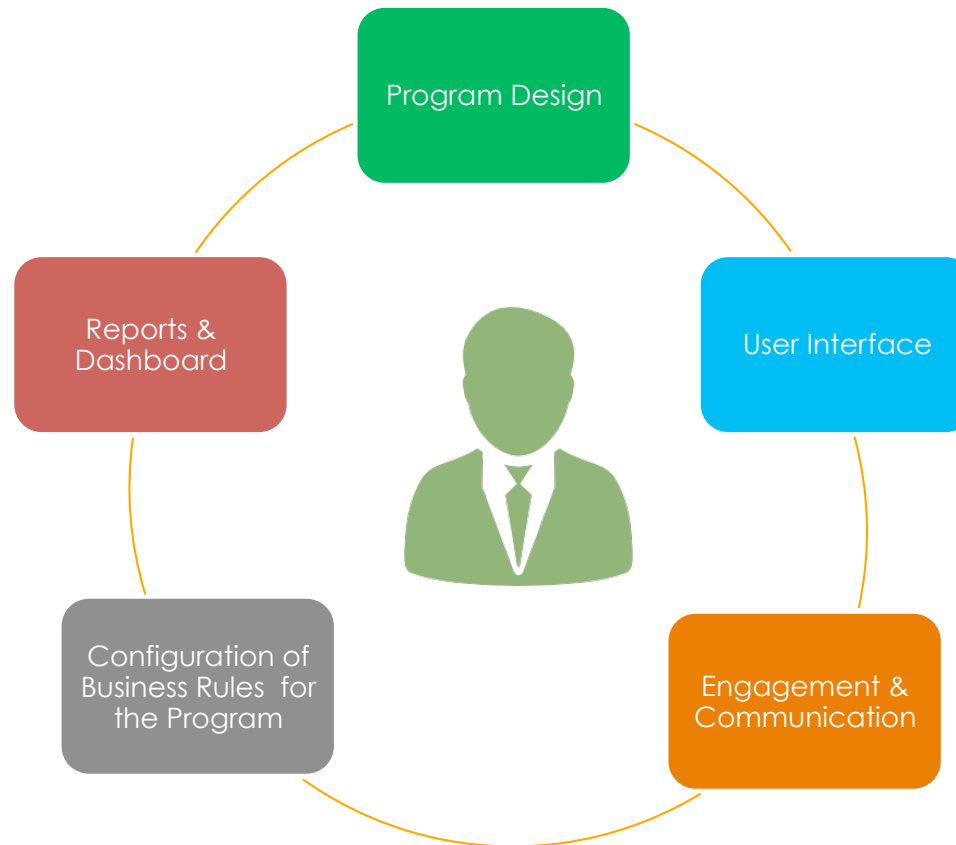
Key Objective



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[2] Program Components

Program Construct



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How will the Loyalty Program Work?

Enrollment

Enrollment will be done post successful completion of PoSP certification. All PoSP's are eligible for the Fast Start Tier. Data is Pulled via API Integration with FinMart

Communication

IFA gets the welcome message via email & SMS they can use their existing Login credentials of Mobile App

Dashboard

Post Login, IFA can see his Dashboard, Points calculation, Tier upgradation etc.

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Tier Configuration

There are four tiers in the Program - Fast Start, Blue, Gold & Platinum. Fast start is the basic tier and there are bonus points in each tier.

Engagement

All the IFA will have Leader Board with their Ranking (State Wise). There is communication sent to every IFA for the Short fall of Target and Tier Upgradation with benefits

Rewards & Recognition

IFAs can Redeem their Points on World Swipe Catalogue for rewards. IFAs can unlock benefits if they perform above 35% fin value and Volume for 3 months



[3] Tiers & Benefits

Tiers & Benefits

- 02** FastStart
- 01** Silver
- 03** Gold
- 04** Platinum



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Tiers & Benefits (configuration)

Customer Tiers	FastStart / Blue	Silver	Gold	Platinum
Qualifying Criteria for Entry	PoSP Training	10000 points	20000 points	50000 points
Tier Review Period	Tier Upgrade is Quarterly. Tier Downward is Annual.			
Earn Design				
1. Tier Welcome / Tier Achievement Bonus	500	500	1000	3000
2. Base Earnings (Value Linked)				
Insurance	200:1	200:1	200:1	200:1
Loan	1000:1	1000:1	1000:1	1000:1
3. Benefits (Experiential / Emotional)				
Circle of Family: Siksha	-	1500	3000	5000
Special Recognition (Leaderboard based - Unannounced)	-	-	As per design	As per design
Circle of Me: Certification	-	-	-	Yes
Special Rewards	-	-	-	Yes
4. Accelerators				
Focus Campaign Levers	As per design			
Targets / Value + Volume Goals	As per design			

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Tiers & Benefits



FastStart

- Welcome Kit with Program details (Single Sign on in the Mobile App & Microsite)
- IFA gets 500 welcome points on enrollment
- IFA needs to achieve minimum 1000 Points to start redemption
- Every product will have points tagged depending on value of sale post deduction of charges like GST etc
- Each Points is equal to Re.1/-
- IF the IFA achieves 10000 Points, he is Upgraded to Next level (Blue) immediately.

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Tiers & Benefits



Silver

- Tier details of Blue level on dashboard & quarterly sales targets
- Free Amazon Voucher of Rs 500 (Tier Welcome Gift).
- Shiksha (Sponsored Course worth 1500 for kids like Art or Music or Computer Basics etc)
- 7 warm Leads annually
- Every Product will have Points tagged depending on value & Volume of sale post deduction of charges like GST etc.
- IF the IFA achieves 30000 Points he is Upgraded to Next level (Gold) immediately
- **Tier Performance Bonus of 2000 points (Achieve target for 4th Qtr)**

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Tiers & Benefits



Gold

- Tier details of Gold level on dashboard & quarterly sales targets
- Free Amazon Voucher of Rs 1000 (Tier Welcome Gift).
- Shiksha (Sponsored Course worth 3000 for kids like Art or Music or Computer Basics etc)
- 10 warm Leads annually
- Every Product will have Points tagged depending on value of sale post deduction of charges like GST etc.
- Each Points is equal to Re.1/-
- IF the IFA achieves 50000 Points he is Upgraded to Next level (Platinum) immediately
- **Tier Performance Bonus of 4000 points (Achieve target for 4th Qtr)**

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Tiers & Benefits







Platinum.

- Tier details of Platinum level on dashboard & quarterly sales targets
- Free Amazon Voucher of Rs 3000 (Tier Welcome Gift).
- Shiksha (Sponsored Course worth 5000 for kids like Art or Music or Computer Basics etc)
- 15 warm Leads annually
- Eligible for International Trip (2 Adult only)
- Every Product will have Points tagged depending on value of sale post deduction of charges like GST etc.
- IF the IFA achieves 50000 Points he get Sponsorship for Fellowship of Indian Institute of Insurance
- **Tier Performance Bonus Of 5000 points (Achieve target for 4th Qtr is applicable)**

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Leader board

1	USHARANI CHILUKA		
2	PREETI SIDDHARTH BURVEY		
3	YOU		
4	AJAY KAMALVAS GIRI		



You Need Sale worth 3L in 7 Days



You Need Sale worth 5L in 10 Days



You Need Sale worth 30L in 21 Days

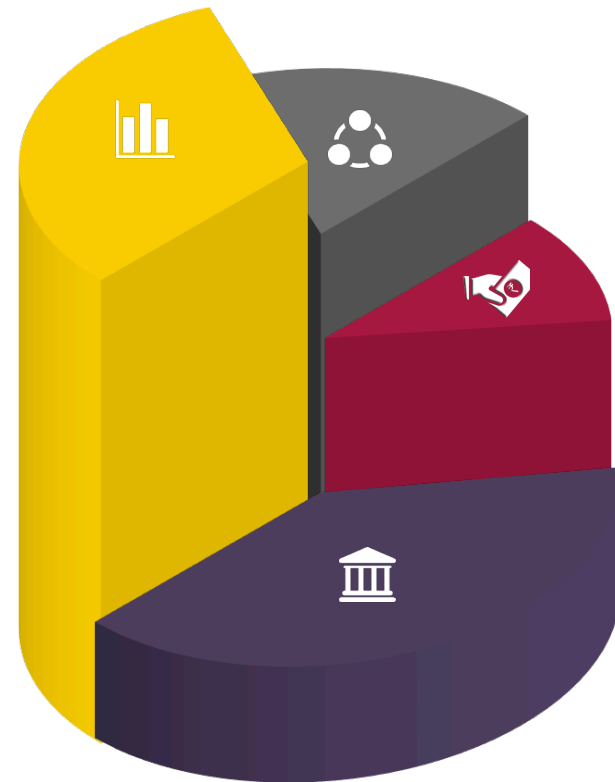
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[1] Dashboard & Reports

Data Segmentation & Analytics

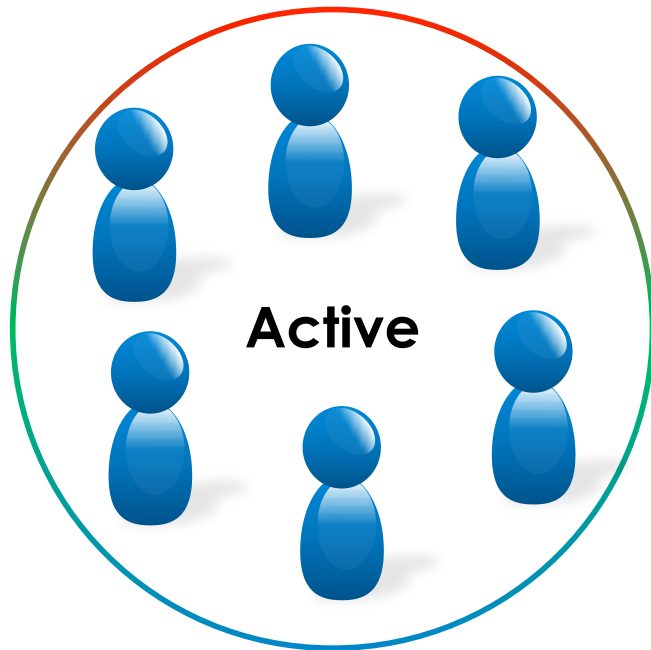
- Total Registered Members
- Total Points Earned
- Total Sales Region wise
- Redemption Report
- Total Members in Each Tier
- Total Active & Inactive Members
- Highest Selling Product & Lowest Selling Product



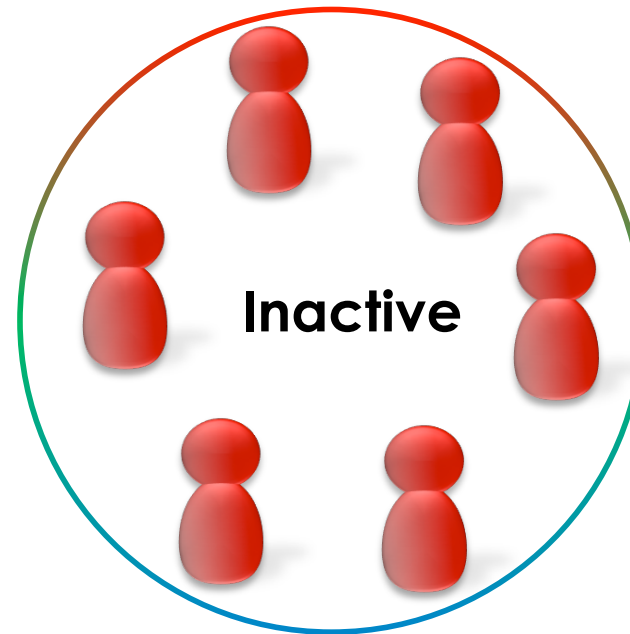
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Segmentation & Engagement



IFA achieved target in Last Qtr



IFA didn't achieve their target in Last Qtr

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Engagement - Approach



Active

- Log in Personal Loan of 100000 today and get 2000 Points
- Unlock Free Trip to London by achieving your target of 3 Qtr
- Congratulations! You have got 300 Bonus Points for achieving 75% of your target
- Happy Birthday ! Feel Gifted with 500 Birthday Points



Inactive

- Engage with him via multiple channel and capture his response
- SMS Campaign of rewards available for redemption on reaching near the threshold(1000 points)
- Birthday ,Anniversary & Seasonal Greetings

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Business Insights

States	Performing Market	Potential Market
Andhra Pradesh	●	
Arunachal Pradesh	●	
Gujarat	●	
Haryana		●
Maharashtra	●	
Punjab		●
Rajasthan	●	

- Performing Market
- Potential Market

Report (All India)

Active

70%

Inactive

30 %

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Top Performance Award

Client Success Manager



1. Generate new idea to engage with Program Members
2. Defines the Scope of enhancement by gathering data insides
3. Recognize the Solution for solving the Problem
4. Evaluates the Do & Don'ts of the program (risk management)
5. Implements the process to fix the gap
6. Delivers Success

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Thank You

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