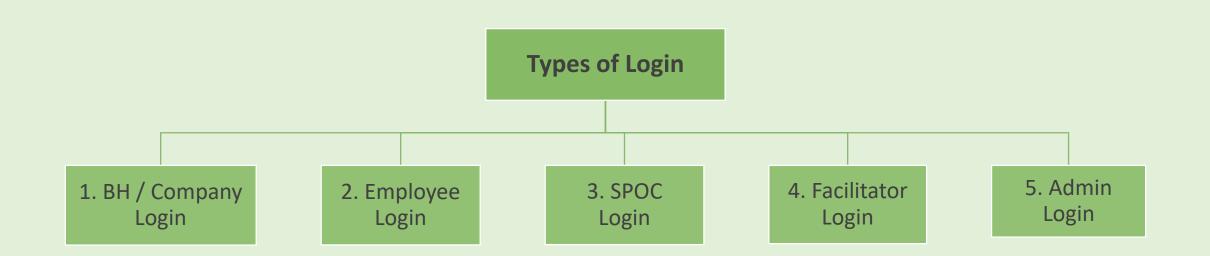
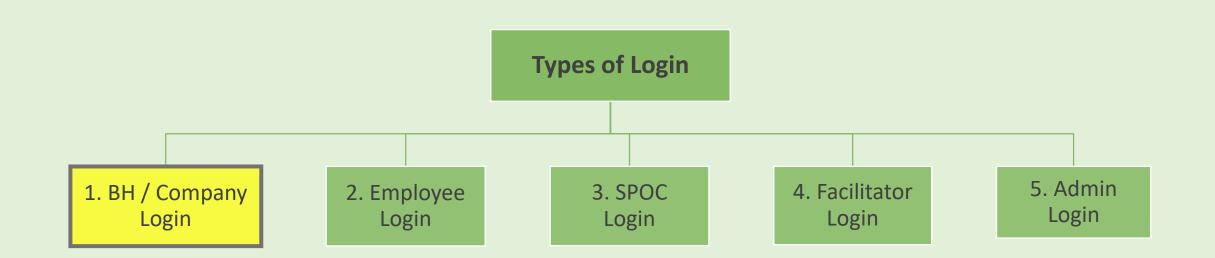


Username:

Password:

Login







Dashboard Company 1 learn more

Log out

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Account Setting

June 2024

Back Office Services Acknowledged

**Back Office Services Closed** 

Front Office Services

View more >

**Business Opportunities Opened** 

Dashboard

Company 1 learn more

Log out

<<

Dashboard

Reservoir

Employees

🗽 🛮 Worklog

Business Sarthi

Account Setting

Back Office Services Acknowledged

115

Back Office Services Closed

102

Front Office Services

56 View more v **Business Opportunities Opened** 

18

No. of Business Closed from Existing Client Goal Review and Audit meetings

52

No. of Business opportunities closed from ECS info-updates activity

34

NCA acquired from 7 step process

22

No. of new leads added from ECS referrals

43







NCA Reservoir

ECS Reservoir









## Reservoir

Company 1 <u>learn more</u>

Log out



Company 1 <u>learn more</u>

Log out

<<







ECS Reservoir









Sr. No.	Month	Date	Name	Age Group	Gender



Company 1 learn more

Log out

<<



Dashboard





ECS Reservoir









Gender	Marital Status	Occupation	Income Group	Dependants	Area



Company 1 learn more

Log out

<<





NCA Reservoir

ECS Reservoir







Account Setting

Source Description	Assigned to	Remarks



Company 1 learn more

Log out

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NCA Reservoir

ECS Reservoir









Name	RM / Team	Client Creation	Client Pro		
		Date	Age Group	Gender	
	Name	Name RM / Team		· · · · · · · · · · · · · · · · · · ·	



Company 1 learn more

Log out

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NCA Reservoir

ECS Reservoir









Name	RM / Team	Client Creation	Client Pro		
		Date	Age Group	Gender	
	Name	Name RM / Team		· · · · · · · · · · · · · · · · · · ·	

Company 1 learn more

Log out

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NCA Reservoir

**ECS** Reservoir









### **ECS** Reservoir

- 1. Sr. No.
- 2. Name
- 3. RM/Team
- 4. Client Creation Date
- 5. Client Profile
  - 1. Age group
  - 2. Gender
  - 3. Marital Status
  - 4. Occupation
  - 5. Income Group
  - 6. Dependants
  - 7. Contact Number
  - 8. Area
  - 9. Source
  - 10. Source Description

Company 1 learn more

Log out

<<









**ECS** Reservoir









### **ECS** Reservoir

- 6. Products to be serviced
  - 1. AUM of Client
  - 2. Goals Mapped
  - 3. Term
  - 4. Health
  - 5. SIP
  - 6. SWP Corpus
  - 7. PMS
  - 8. LAS
  - 9. LI Premium (Saving Plan)
  - 10. ULIPs
- 7. Touchpoints
  - 1. Retirement Goal
    - 1. Audit
    - 2. Review
  - 2. Wealth Protection Goal
    - 1. Audit
    - 2. Review



Employees
Company 1 Learn more

Log out

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Sr. No.	Name	Designation	Contact Number	Email address	Links
					Assign Clients   View Worklog



Log out

<<















Log out

<<









Back Office

Front Office







Log out

<<









Back Office

Front Office





Sr. No.	Month	Date	Client Name	RM Name	Process



Log out

<<









Back Office

Front Office





Process	Instrument Type	Service Type	Service Description	Stakeholder Type	Stakeholder Description



Worklog Company 1 <u>learn more</u>

Log out

<<









Back Office

Front Office





Stakeholder Description	Service Medium	Remark	Closing Date	Turn Around Time (TAT)	Business Opportunities opened



Log out

<<









Back Office

Front Office





Sr. No.	Month	Date	Client Name	Process	Meeting Medium



Log out

<<









Back Office

Front Office





Meeting	Activity Type	Activity	Tools Used	Description	
Medium		for Goal			New Demat



Log out

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Back Office

Front Office





Business Opportunities Opened (Soft Commitment)								
New Demat	SIP	Lumpsum	SWP	Term	Mediclaim			



Log out

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♠ Dashboard

Reservoir

Employees

**₩** Worklog

Back Office

Front Office

🗶 Business Sarthi 🔪

Account Setting

Business Opportunities Opened (Soft Commitment)					Notes
SWP	Term	Notes			



Home

Team 1 <u>learn more</u>

Log out

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Part 1

Part 2

Account Setting



## Home

Team 1 learn more

Log out

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Part 1

Part 2

Account Setting

Se	cti	or	ı A	•

Sub-section 1:

Sub-section 2:

Sub-section 3:

Sub-section 4:

Section B:

Sub-section 1:

Sub-section 2:

Sub-section 3:











Part 1

Part 2

Account Setting

**Section A:** 

### Sub-section 1:

Tool Type	# Tool Name	View	Download Video
Presentation	1 How to Conduct Survey?	<u>View</u>	<u>Download</u> -
Steps	<ul><li>2 Steps for Conducting Survey</li><li>3 Steps for Asking Survey Questions</li></ul>	<u>View</u> <u>View</u>	<u>Download</u> - <u>Download</u> -
	4 Family Financial Awareness Survey	PDF   Excel	PDF   Excel Watch Video
Templates	5 Seven Questions Survey	PDF   Excel	PDF   Excel Watch Video

Sub-section 2:

Sub-section 3:



## Home

Team 1 learn more

Log out

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Part 1

Part 2

Account Setting

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20		/	

Sub-section 1:

Sub-section 2:

Sub-section 3:

Sub-section 4:

Section B:

Sub-section 1:

Sub-section 2:

Sub-section 3:

# Home

Team 1 learn more

Log out

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Part 1

Part 2



#### **Section A:**

### Sub-section 1:

Tool Type	# Tool Name	View	Download Video
Presentation	1 How to Conduct Survey?	<u>View</u>	<u>Download</u> -
Steps	<ul><li>2 Steps for Conducting Survey</li><li>3 Steps for Asking Survey Questions</li></ul>	<u>View</u> <u>View</u>	<u>Download</u> - <u>Download</u> -
<b>-</b>	4 Family Financial Awareness Survey	PDF   Excel	PDF   Excel Watch Video
Templates	5 Seven Questions Survey	PDF   Excel	PDF   Excel Watch Video

### Sub-section 2:

Sub-section 3:











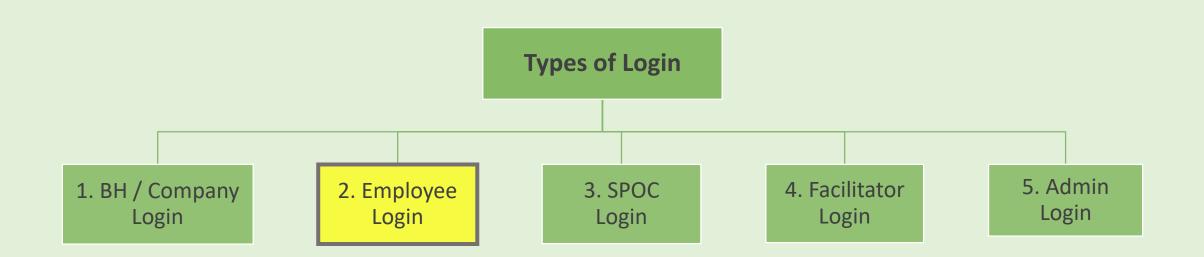
**X** Business Sarthi

Account Setting

# Home

Team 1 <u>learn more</u>

Log out







Reservoir

Worklog

Business Sarthi

Account Setting

Home

Team 1 learn more

Log out

June 2024

No. of days worked

Back Office Services Acknowledged

Back Office Services Closed

102

Front Office Services

**Business Opportunities Opened** 

Team 1 learn more

<<





NCA Reservoir

ECS Reservoir







#### **NCA** Reservoir

- 1. Sr. No.
- 2. Month
- 3. Date
- 4. Name
- 5. Age Group
- 6. Gender
- 7. Marital Status
- 8. Occupation
- 9. Income Group
- 10. Dependants
- 11. Contact number
- 12. Area
- 13. Source of Data
- 14. Source Description
- 15. Assigned to
- 16. Remarks



Team 1 learn more



<<







ECS Reservoir







#### **ECS** Reservoir

- 1. Sr. No.
- 2. Name
- 3. RM/Team
- 4. Client Creation Date
- 5. Client Profile
  - 1. Age group
  - 2. Gender
  - 3. Marital Status
  - 4. Occupation
  - 5. Income Group
  - 6. Dependants
  - 7. Contact Number
  - 8. Area
  - 9. Source
  - 10. Source Description

Team 1 learn more

Log out









**ECS** Reservoir







### **ECS** Reservoir

- 6. Products to be serviced
  - 1. AUM of Client
  - 2. Goals Mapped
  - 3. Term
  - 4. Health
  - 5. SIP
  - 6. SWP Corpus
  - 7. PMS
  - 8. LAS
  - 9. LI Premium (Saving Plan)
  - 10. ULIPs
- 7. Touchpoints
  - 1. Retirement Goal
    - 1. Audit
    - 2. Review
  - 2. Wealth Protection Goal
    - 1. Audit
    - 2. Review









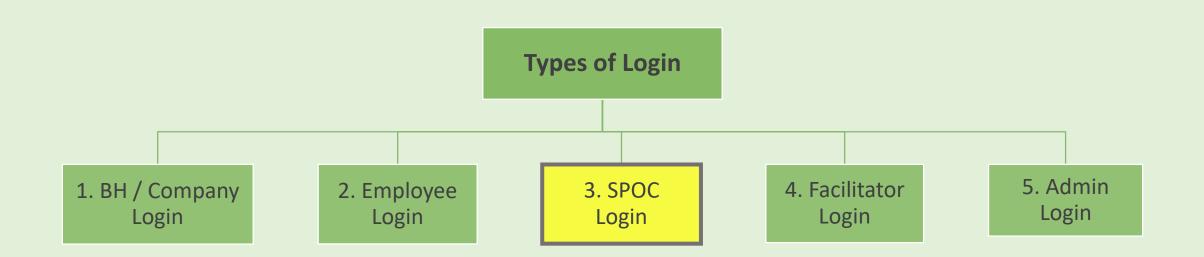


Account Setting

# Home

Team 1 <u>learn more</u>

Log out





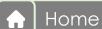
Home

Team 1 learn more

Log out

V

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🗘 Setting

No. of hours worked

102 / 150

Individual Training Facilitated

06

June 2024

RM Review Meetings

24 / 36

Monthly Closing done

30 / 36

Skill Development

20 / 36

New Workshop Participants

18





Participants



Worklog



## Home

Team 1 learn more

Log out

Fi	lters	
ГΙ	11617	

Company Name:

Coaching Level:

Select from the dropdown v

**Apply Filter** 

Participant Name	Company Name	Туре	Coaching Level	Batch Name	Profile Link
Amitabh	AB Studio	Individual RM / MFD	Level 1	Andheri	View Profile
Dilip	Kumar & Sons	Business Head	Level 2	Ghatkopar	View Profile
Yash	C Company	Business Head	Level 3	Mulund	View Profile
Sridevi	Yashraj	Individual RM / MFD	Level 4	Panvel	View Profile
Kamal	Rebel Media	Business Head	Level 3	Fort	View Profile



Home

Team 1 <u>learn more</u>

Log out

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	Name:	Amitabh:
	Company Name:	AB Studio
Photo	Coaching Level:	Level 1
	Batch Name:	Andheri
	Туре:	Individual RM / MFD
Goal		
Actionable		
Touchpoints		





Participants

**₩** Worklog

Setting

# Home

Team 1 learn more

Log out

Sr. No.	Team Name	Date	Work Type	Work Type	Coaching Level	Batch Name







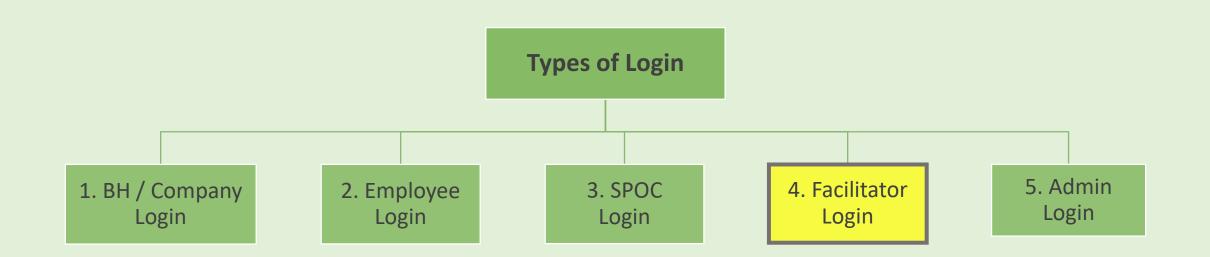
**₩** Worklog

Setting

# Home

Team 1 <u>learn more</u>

Log out









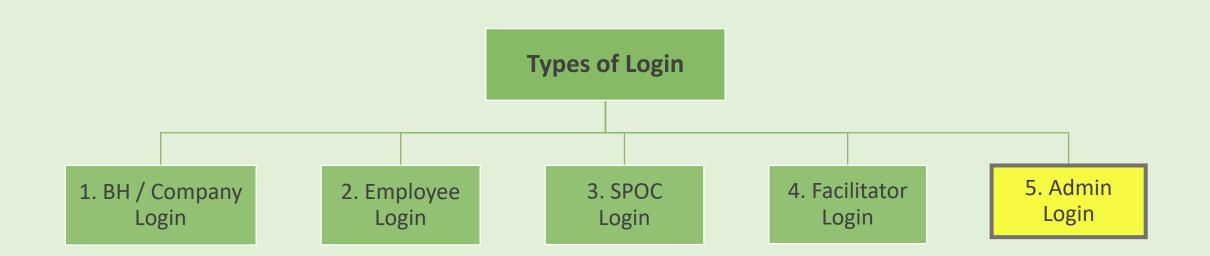




# Home

Team 1 <u>learn more</u>

Log out





Dashboard

Team 1 learn more

Log out

<<





Participants

**X** Business Sarthi

Masters

Account Setting

Back Office Services Acknowledged

1 1

Back Office Services Closed

102

Front Office Services

56

Business Opportunities Opened

18