Journey of Suspect to Lead

State Bank Of India

Document Version History

Date	Prepared By	Reviewer & Date of Review	Approver & Date of Approval	Version	Change Details
6 Sep 2021	Neha Rathore	Patanjal nag Biswas 07 Sep 2021		1.0	Initial Document
03 Jan 2022	Neha Rathore	Patanjal Nag Biswas, 6 Jan 2022	Manju 09 Jan 2022	1.1	Addition of DC02 in Addendum Section
25 Jan 2022	Nagaraj Prasad	Rahul Anand 25 Jan 2022		1.2	Changes of screen as per SBI Entitlement
03 Feb 2022	Rahul Anand	Neha Rathore 03 feb 2022		1.3	Addition of fields in campaign definition-General and brochure field level details

Distribution List

Name	Team

Table of Contents

1. Introduction

Campaign is an activity undertaken by the bank to reach out to customers or prospects for new business. Bank can create a campaign for either an event or for promotion of existing bank products and services. The target audiences identified by the bank for a campaign are termed as leads in the system. The response of the leads can be recorded and performance of the campaign is tracked in the system.

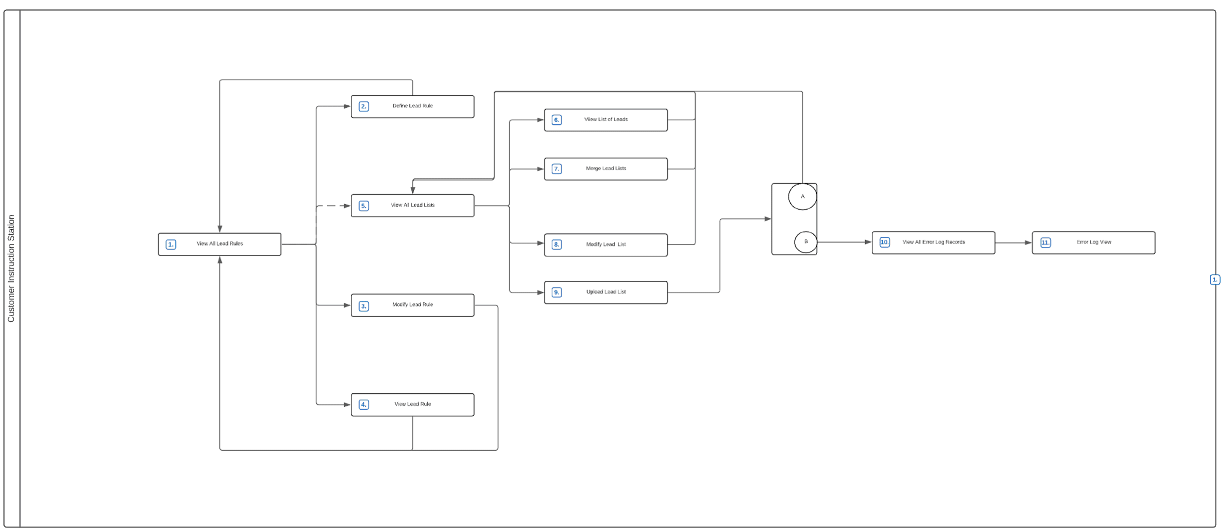
The purpose of this document is to guide the users through the process of creating and managing campaigns, creating and managing a list of intended recipients of the campaign and recording responses pertaining to the underlying campaigns.

2. Prerequisites

S No	Process	Reference Document
1	Customer Onboarding	Journey of Lead to Prospect and Prospect to Customer
2	User Maintenance	ARX Manual, Journey of Defining Maintenance

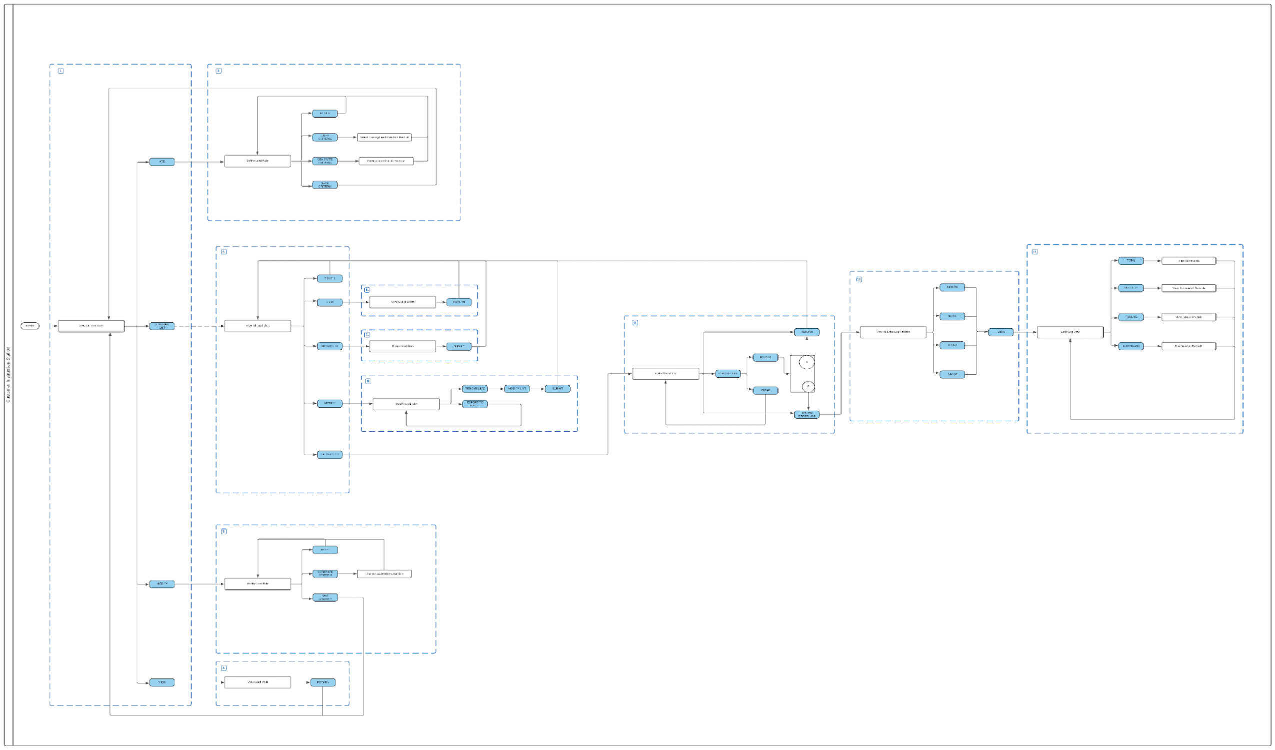
3. Flow Diagram

1. The below three flow diagrams reflects the process flow for Lead List Management at L2, L3 and L4 level. L1 is not applicable for “Journey of Suspect to Lead” since there are no external interfaces (refer to Glossary for definitions)



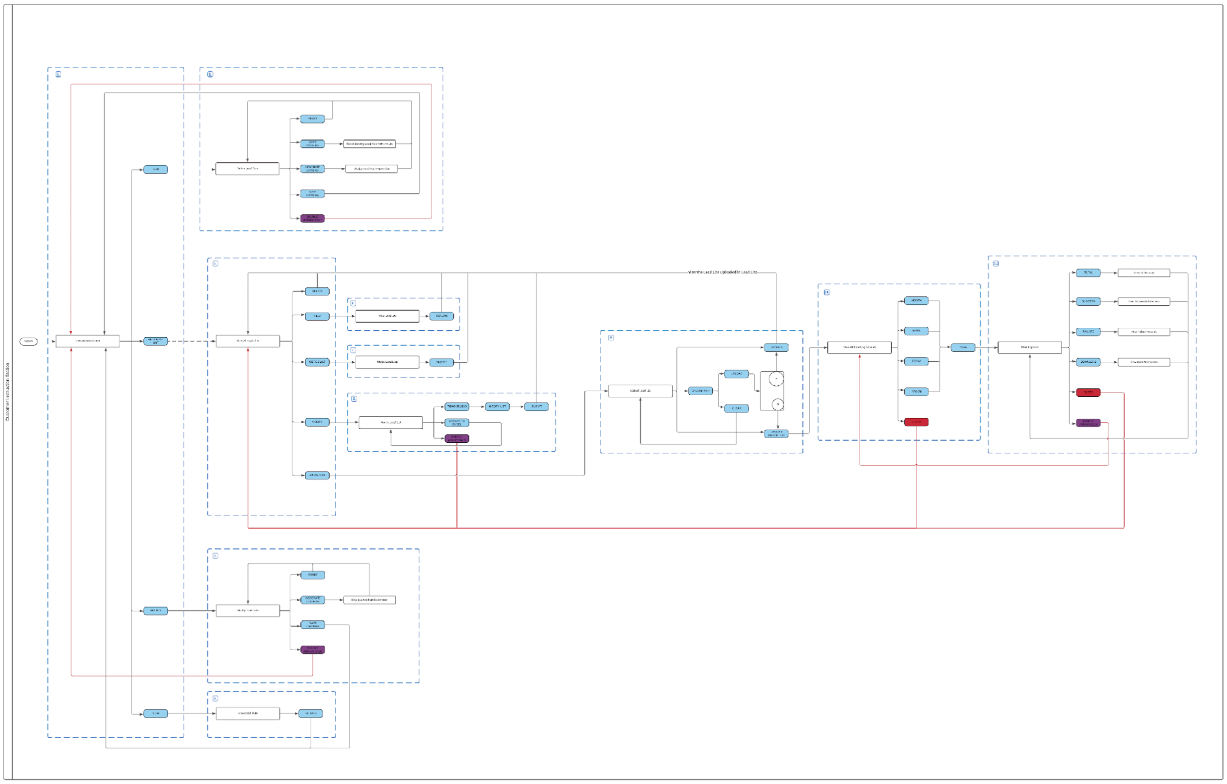
Lead List Management Flow Diagram (L2 View)

Lead List Management L2 View.png



Lead List Management Flow Diagram (L3 View)

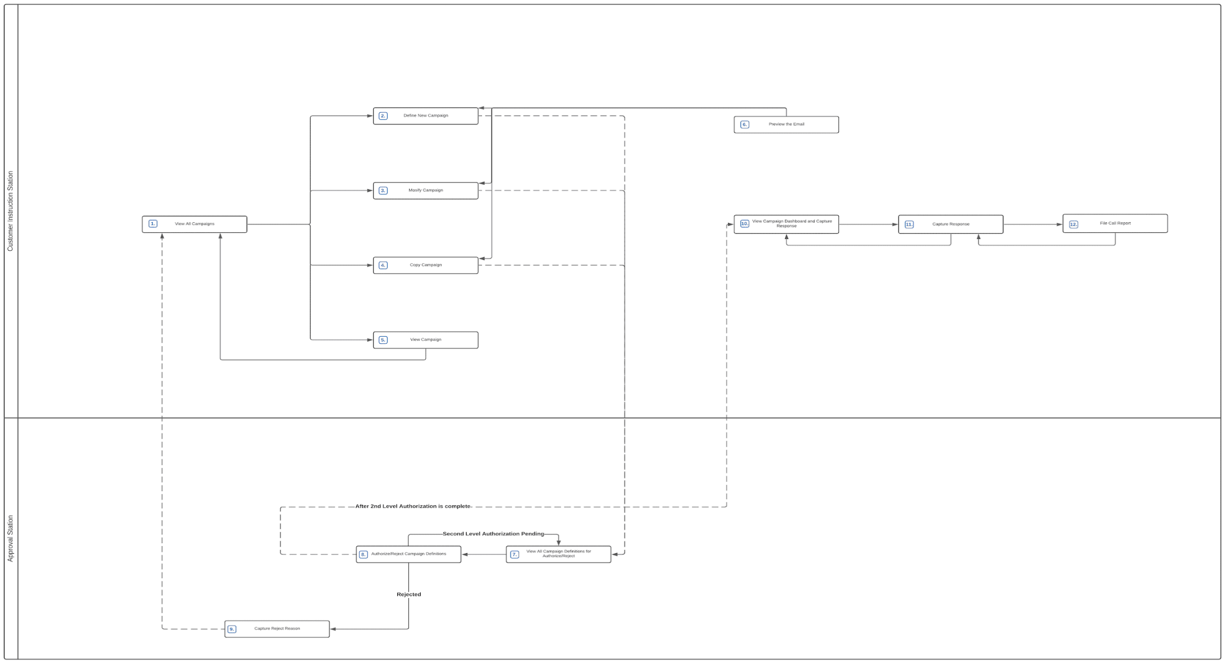
Lead List Management L3 View.png



Lead List Management Flow Diagram (L4 View)

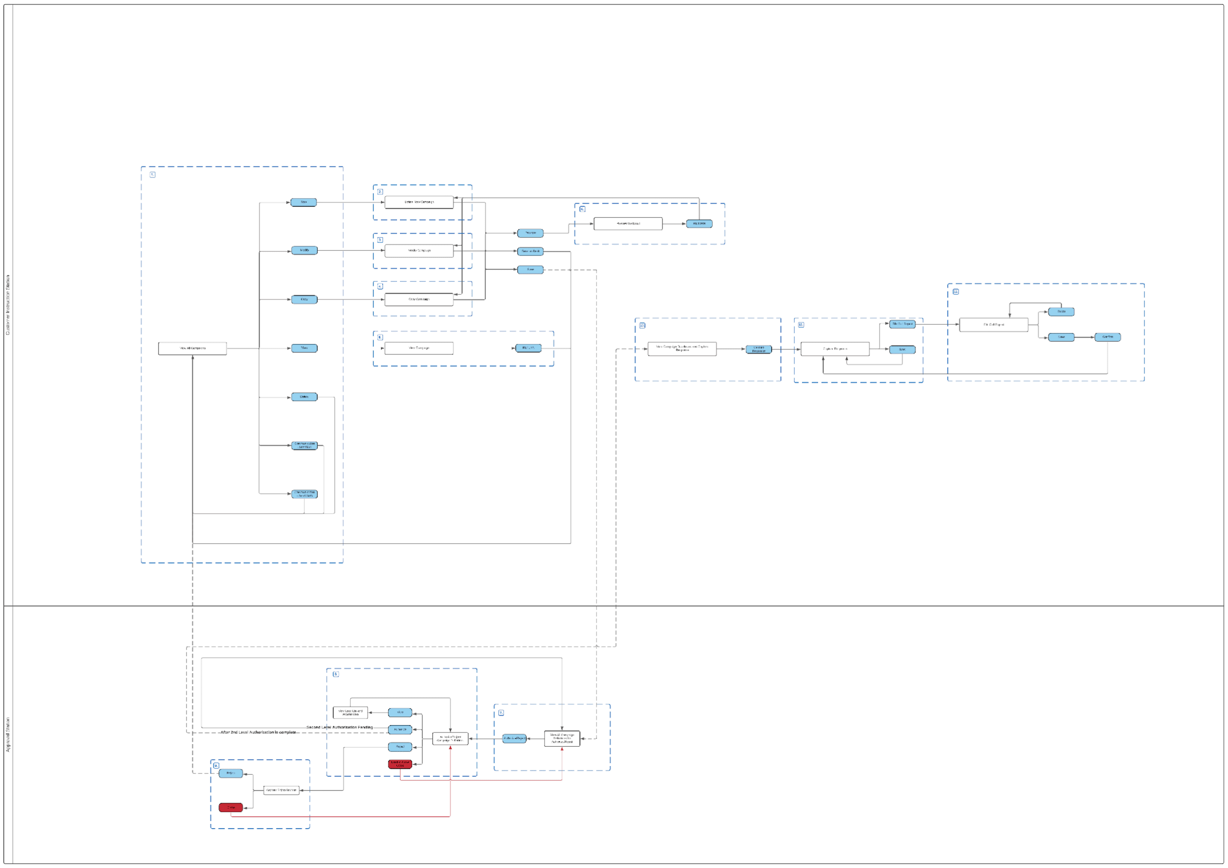
Lead List Management L4 View.png

2. The below three flow diagrams reflects the process flow for Campaign Management at L2, L3 and L4 level



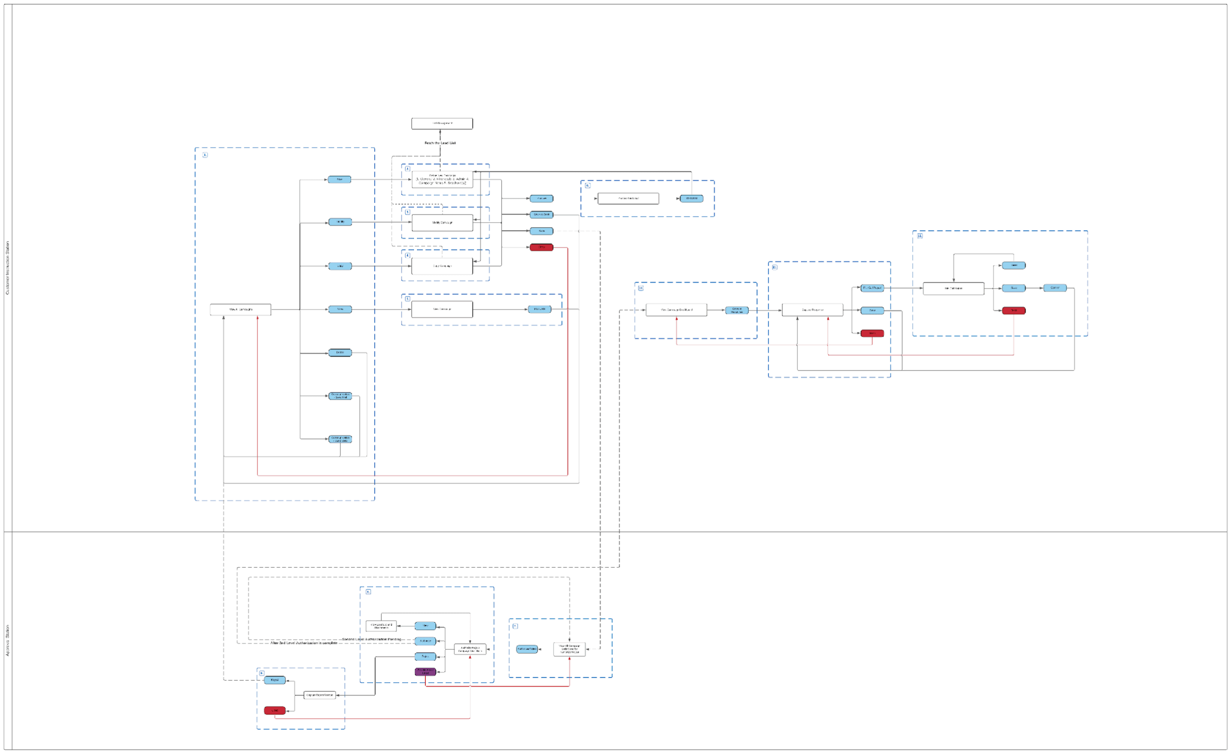
Campaign Management Flow Diagram (L2 View)

Camapign Management L2 View.png



Campaign Management Flow Diagram (L3 View)

Campaign Management L3 View.png



Campaign Management Flow Diagram (L4 View)

Campaign Management L4 View.png

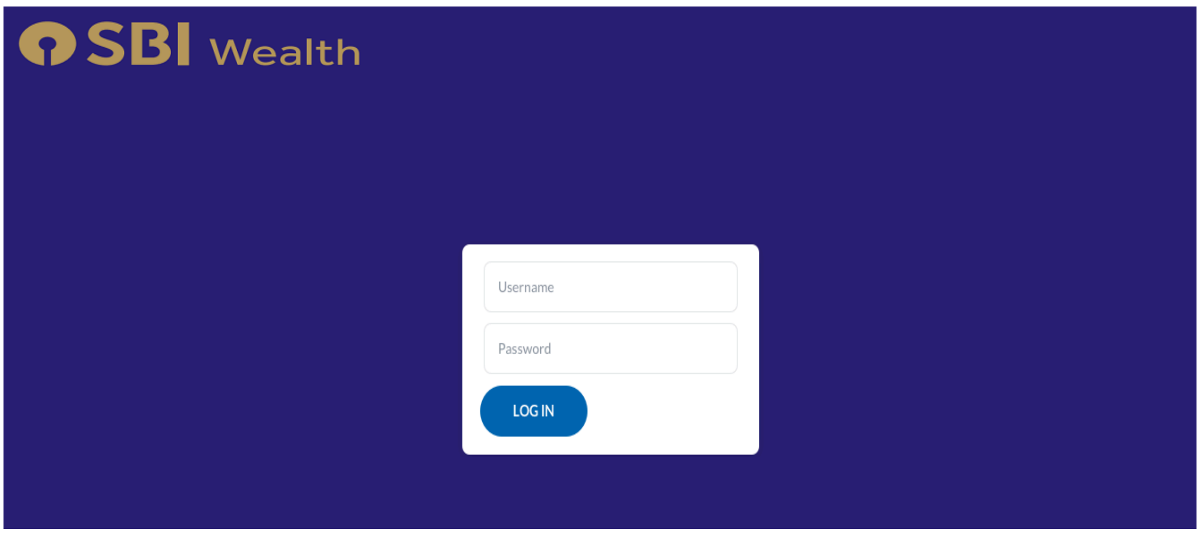
4. Process Description

The journey of suspect to lead consists of Lead List Management and Campaign Management

a. Lead List Management - This process covers generation of target audience lead list for the campaign
b. Campaign Management - This process covers campaign definition, lead generation, capturing the response from the leads and campaign performance tracking

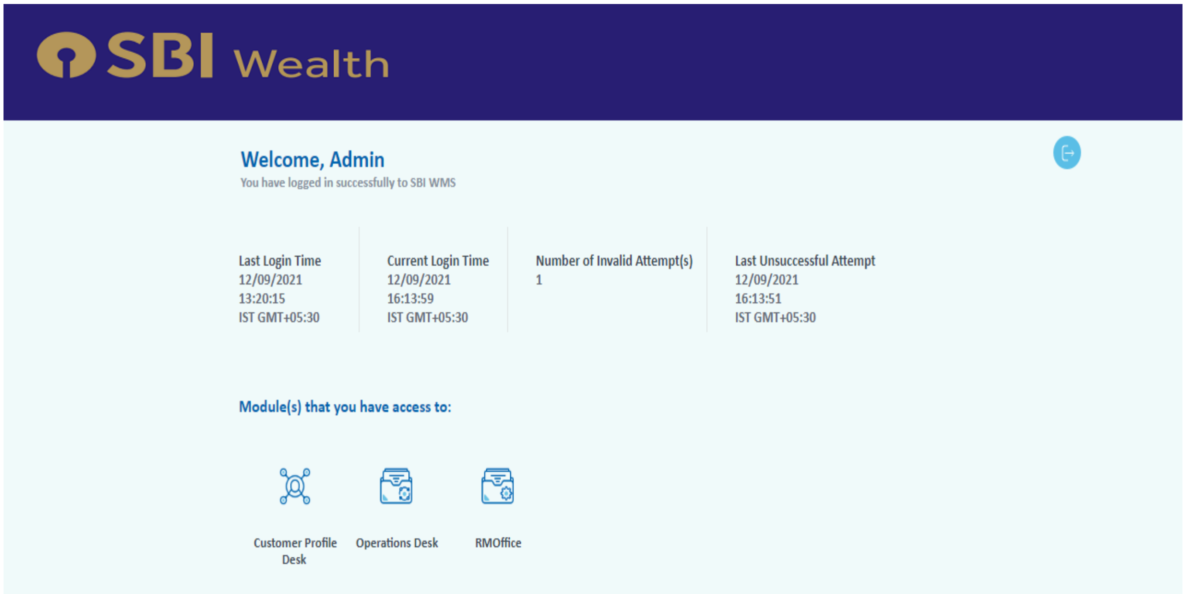
4.1 Login

1 The User enters their credentials and logs into the application



Screen: Launch the application

2 Once logged in, the User clicks on "Customer Profile Desk " to launch the CRM application



Screen: Select Customer Profile Desk

4.2 Lead List Management

The first step in this journey is identification of the target audience for the campaign. This can be done in the following ways:

a. Automatic Lead Generation

b. Lead Upload

c. Manual Lead Creation

4.2.1 Automatic Lead Generation

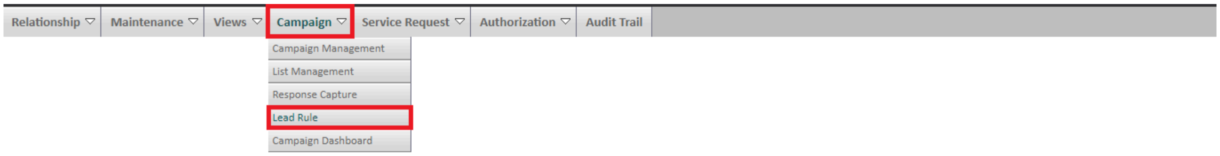
The leads are identified automatically from the existing customers' on boarded in the wealth system. The user defines the filter criteria in Rule Definition and as per the filter criteria defined; the system displays the filtered customer records

4.2.1.1 View All Lead Rules

Lead Rule setup is used to define the rule criteria as per which the existing customer records will be filtered to create a list of potential targets for a campaign. All the existing lead rules already created can be viewed by the user. The user can perform the following actions in Lead Rule:

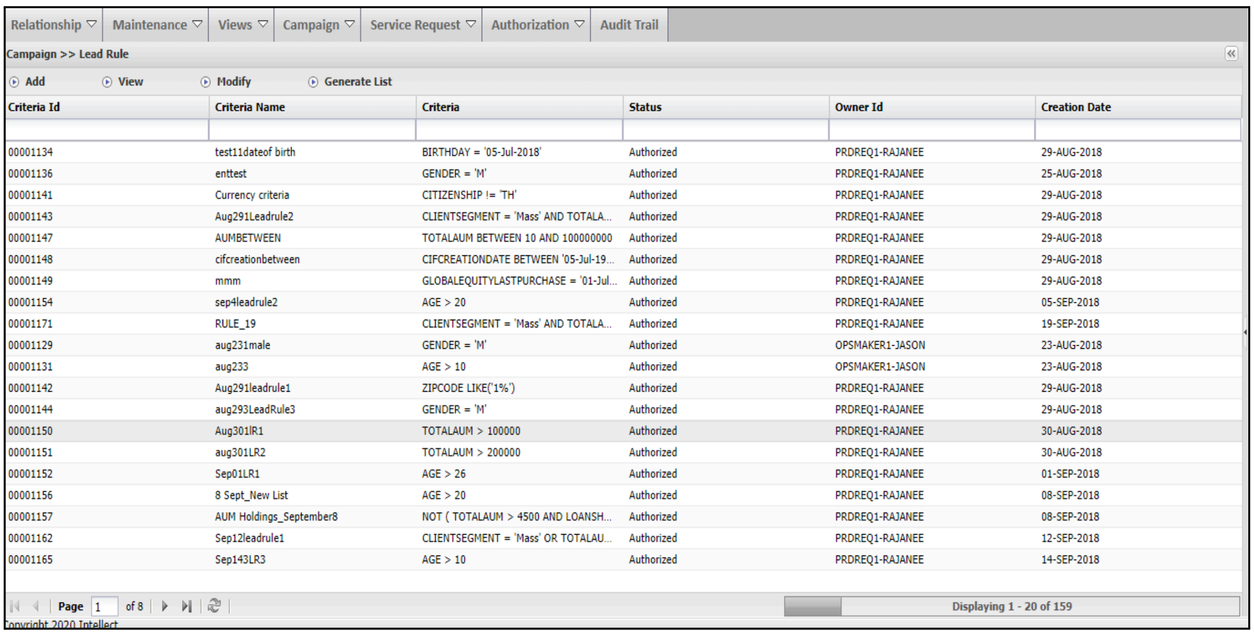
a. Add Lead Rule
b. View an existing Lead Rule
c. Modify an existing Lead Rule
d. Generate List

1. User hovers on the "Campaign" menu and selects the "Lead Rule" sub menu



Screen: Lead Rule Screen Navigation

2. User views the lead rules defined in the system



Criteria Id	Criteria Name	Criteria	Status	Owner Id	Creation Date
00001134	test11dateof birth	BIRTHDAY = '05-Jul-2018'	Authorized	PRDREQ1-RAJANEE	29-AUG-2018
00001136	enttest	GENDER = 'M'	Authorized	PRDREQ1-RAJANEE	25-AUG-2018
00001141	Currency criteria	CITIZENSHIP != 'TH'	Authorized	PRDREQ1-RAJANEE	29-AUG-2018
00001143	Aug291Leadrule2	CLIENTSEGMENT = 'Mass' AND TOTALA...	Authorized	PRDREQ1-RAJANEE	29-AUG-2018
00001147	AUMBETWEEN	TOTALAUM BETWEEN 10 AND 100000000	Authorized	PRDREQ1-RAJANEE	29-AUG-2018
00001148	cifcreationbetween	CIFCREATIONDATE BETWEEN '05-Jul-19...	Authorized	PRDREQ1-RAJANEE	29-AUG-2018
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00001131	aug233	AGE > 10	Authorized	OPSMAKER1-JASON	23-AUG-2018
00001142	Aug291leadrule1	ZIPCODE LIKE('1%')	Authorized	PRDREQ1-RAJANEE	29-AUG-2018
00001144	aug293LeadRule3	GENDER = 'M'	Authorized	PRDREQ1-RAJANEE	29-AUG-2018
00001150	Aug301lR1	TOTALAUM > 100000	Authorized	PRDREQ1-RAJANEE	30-AUG-2018
00001151	aug301LR2	TOTALAUM > 200000	Authorized	PRDREQ1-RAJANEE	30-AUG-2018
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00001156	8 Sept_New List	AGE > 20	Authorized	PRDREQ1-RAJANEE	08-SEP-2018
00001157	AUM Holdings_September8	NOT (TOTALAUM > 4500 AND LOANSH...	Authorized	PRDREQ1-RAJANEE	08-SEP-2018
00001162	Sep12leadrule1	CLIENTSEGMENT = 'Mass' OR TOTALAU...	Authorized	PRDREQ1-RAJANEE	12-SEP-2018
00001165	Sep143LR3	AGE > 10	Authorized	PRDREQ1-RAJANEE	14-SEP-2018

Screen: View All Lead Rules

4.2.1.2 Add Lead Rule

Add Lead Rule is used to add the rule criteria based on which the existing customer records will be filtered to create a list of potential targets for a campaign

1. User clicks on the “Add” to add a new lead rule

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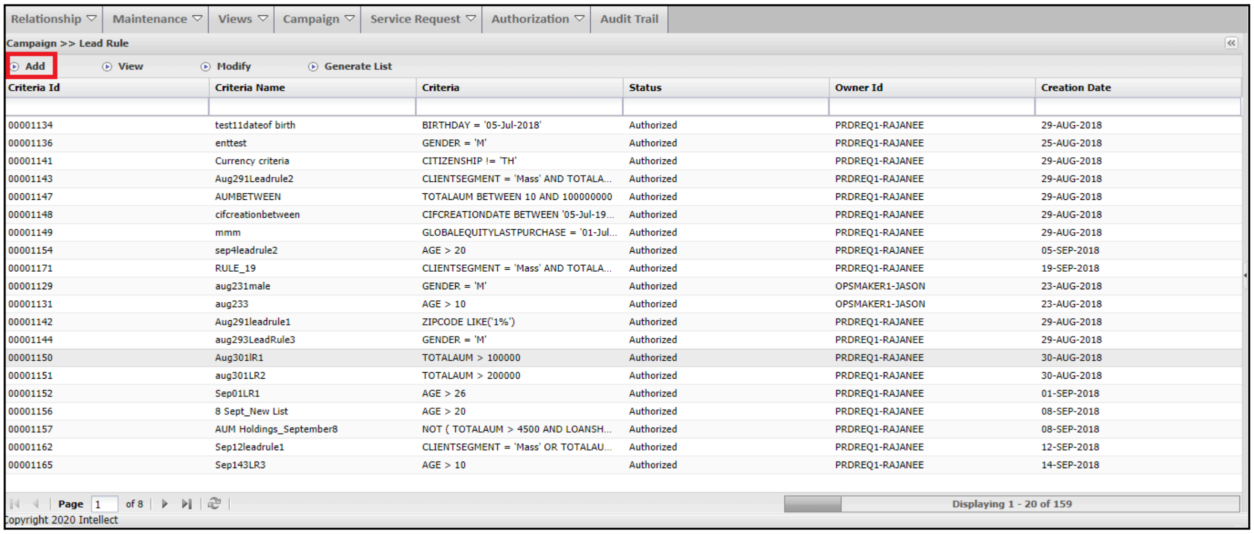

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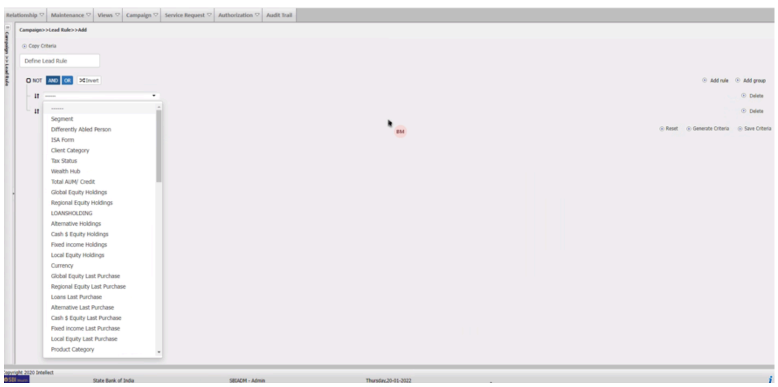
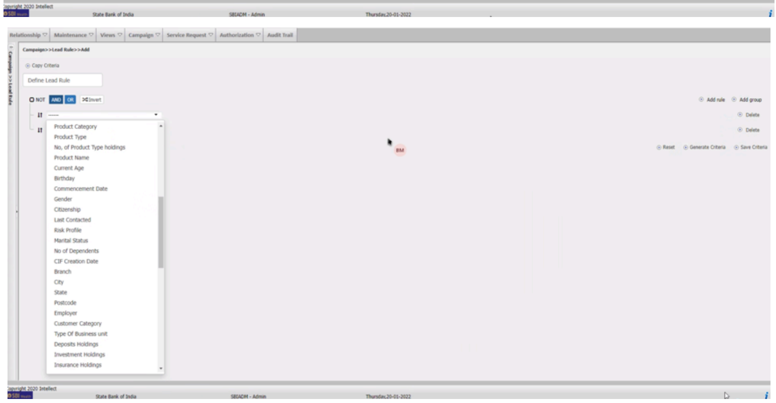
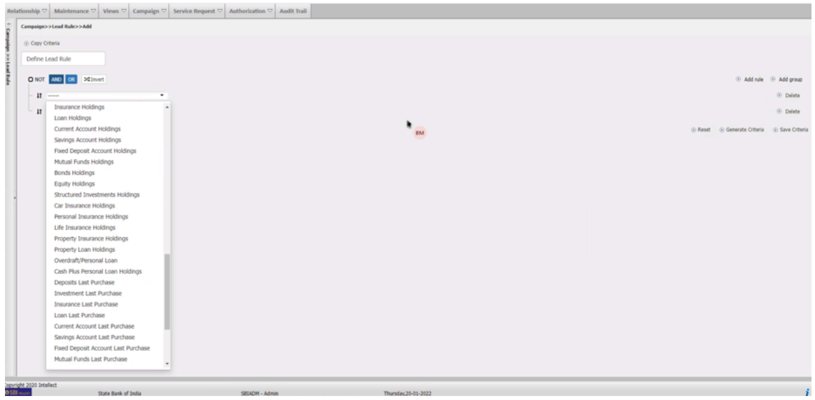
00001162	Sep12leadrule1	CLIENTSEGMENT = 'Mass' OR TOTALAU...	Authorized	PRDREQ1-RAJANEE	12-SEP-2018
00001165	Sep143LR3	AGE > 10	Authorized	PRDREQ1-RAJANEE	14-SEP-2018

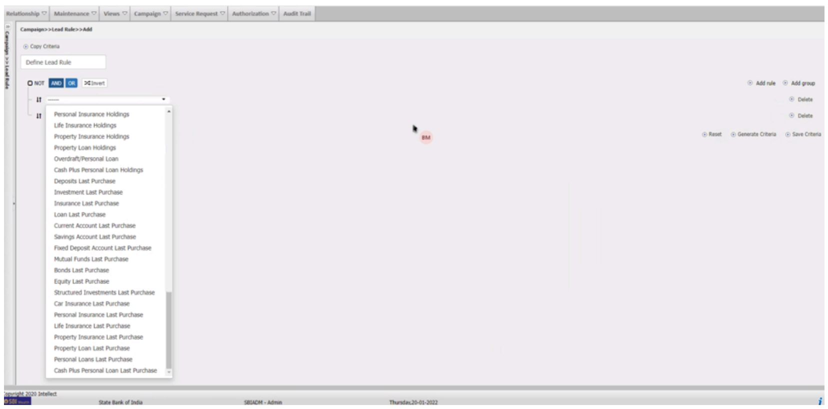
Screen: Define Lead Rule Screen Navigation

2. User inputs the “Criteria Name” and views the list of criteria for lead rule definition



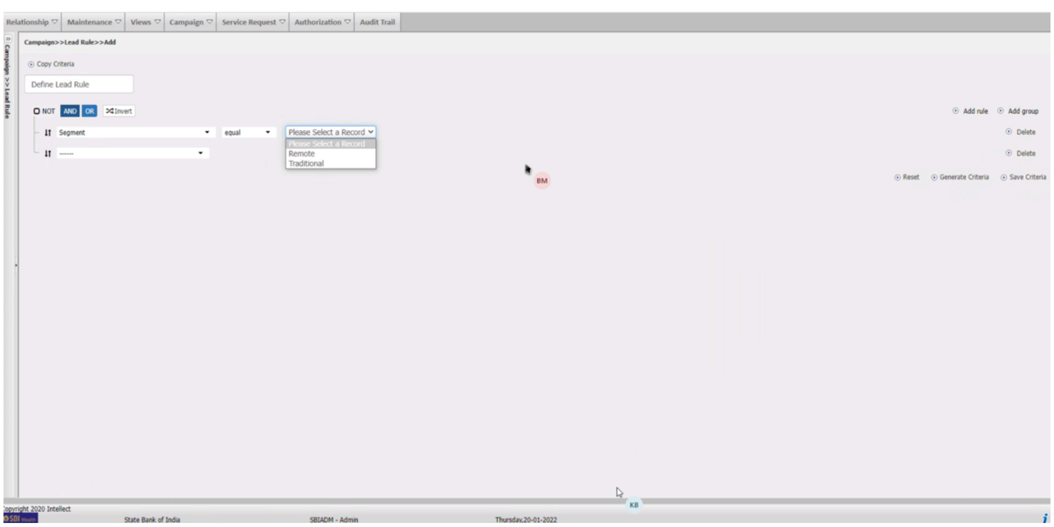






Screen: Define Lead Rule - Enter Criteria Name and View List of Criteria

3. User selects the criteria from the dropdown list, mathematical operation and the criteria value. In the below example (Criteria - Client Segment, Mathematical Operation - Equal, Criteria Value - Priority)

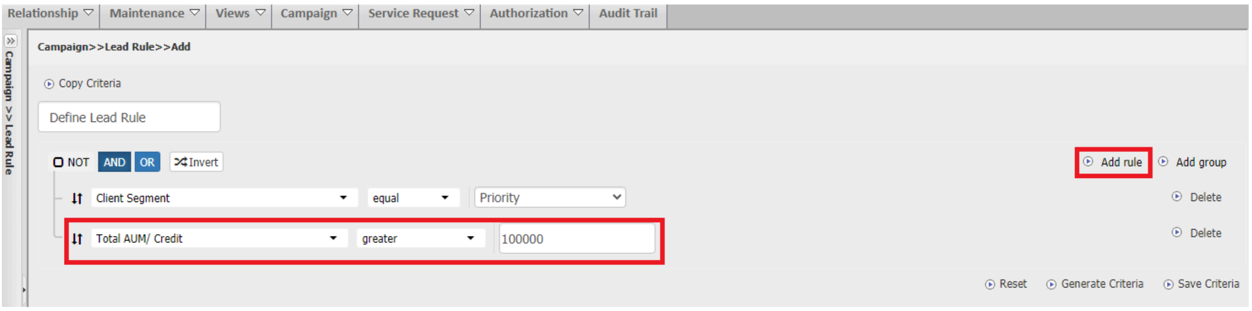


Screen: Lead Rule Criteria

a. Users can add rules to the existing rule present by clicking on the “Add Rule”. The below example has two criteria:

   i. Client Segment is equal to Priority

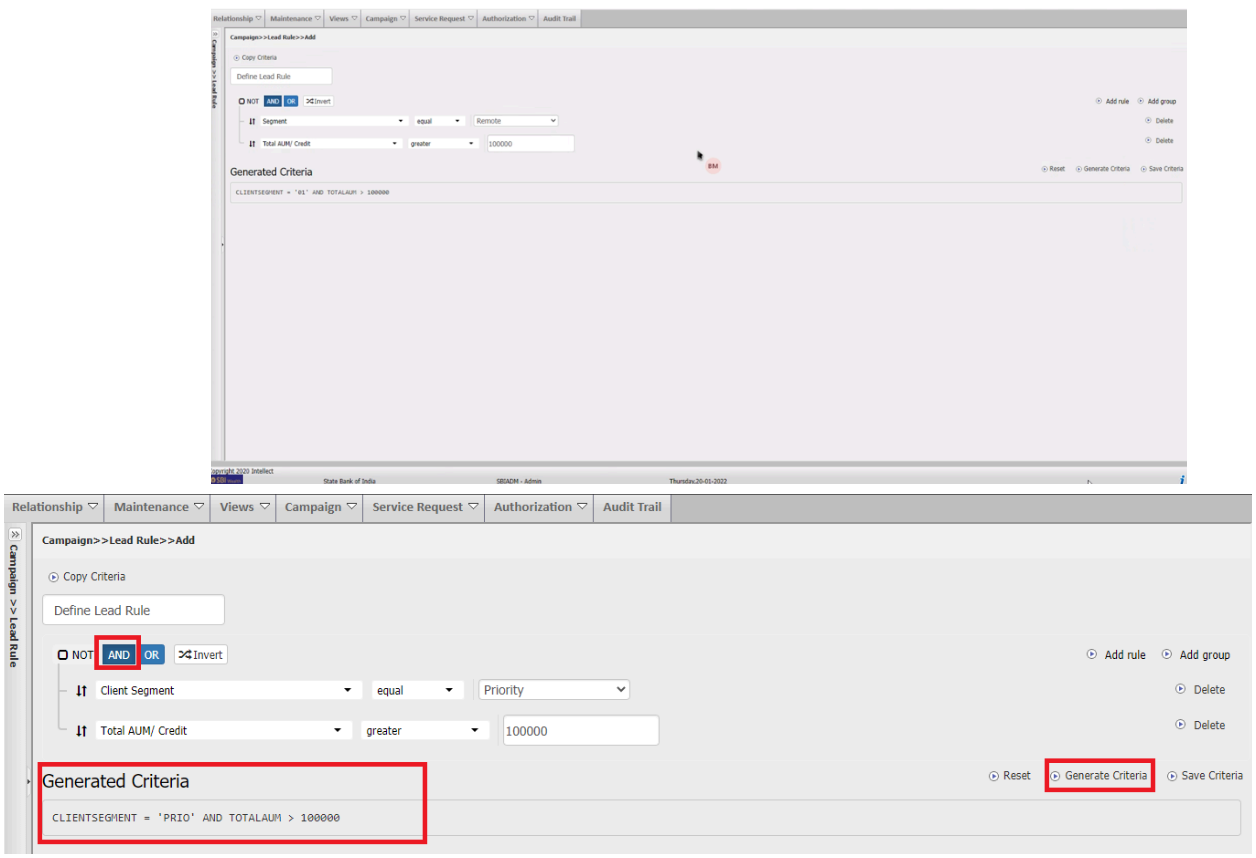
   ii. Total AUM/Credit greater than 100000 INR



Screen: Lead Rule Criteria

b. Users can join the single criteria with Logical Operator (AND, OR). The below example has two single criteria joined with the “AND” logical operator. Users can view the rule criteria by clicking on “Generate Criteria”

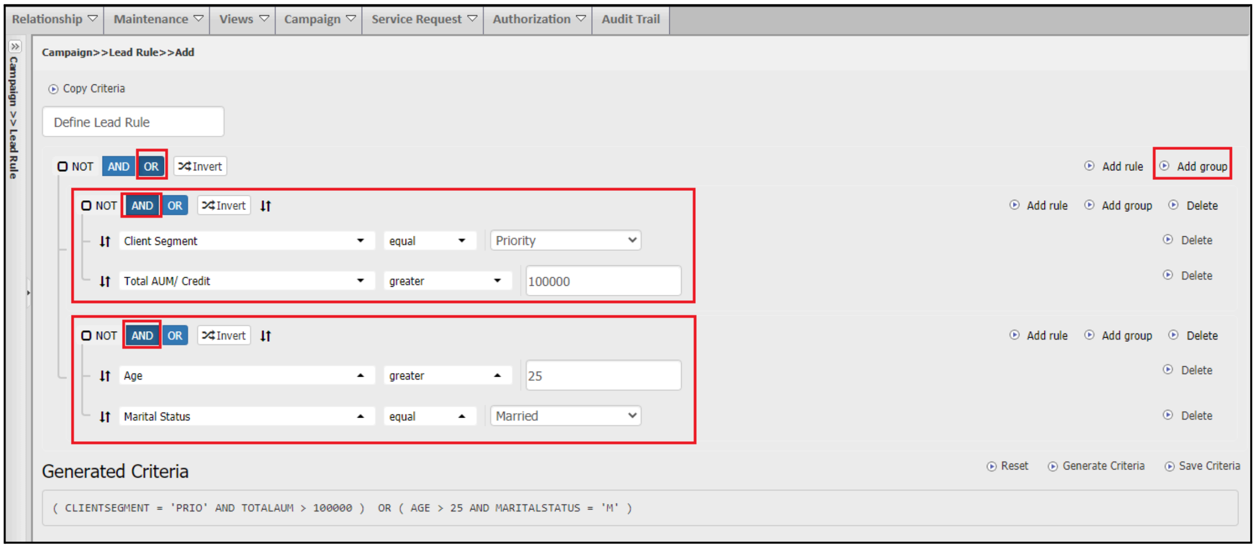
   i. Client Segment is equal to Priority (AND) Total AUM/Credit greater than 100000 INR



Screen: Generate Criteria

c. Users can join the multiple criteria with Logical Operator (AND, OR) by clicking on “Add Group”. The below example has two - criterion joined with the “OR” logical operator

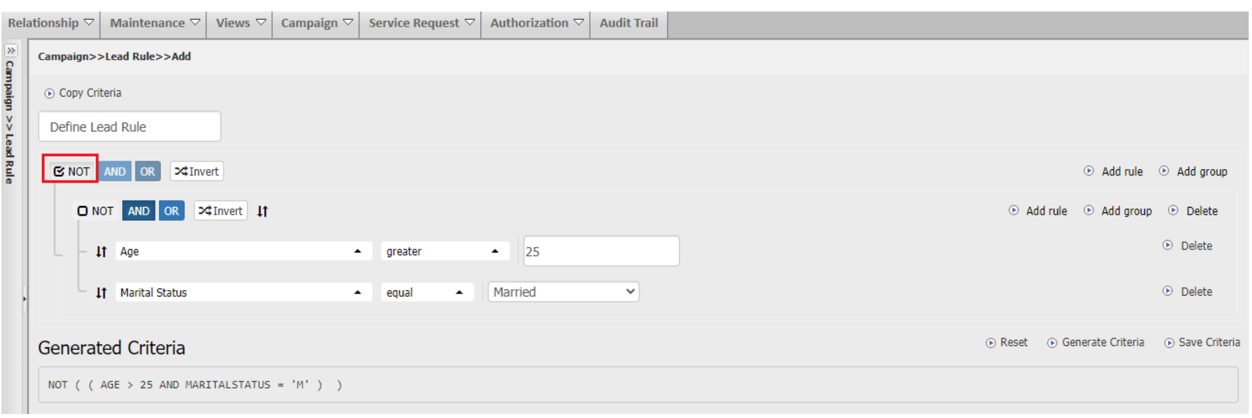
i. **(**Client Segment is equal to Priority (AND) Total AUM/Credit greater than 100000 INR**) OR** (Age greater than 25 (AND) Marital Status is Married)



Screen: Lead Rule Criteria

d. Users can create a - criteria - to exclude the customers satisfying the criteria by using the NOT function. The below example excludes the married customers who have Age greater than 25

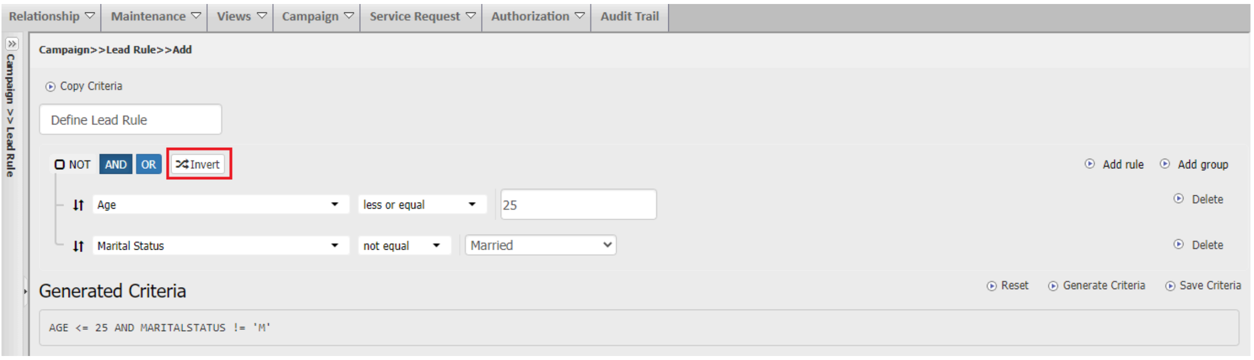
i. NOT (Age greater than 25 (AND) Marital Status is Married)



Screen: Lead Rule Criteria

e. Users can inverse the mathematical operators used for the criteria by clicking on the “Invert”. The below example can be inverted

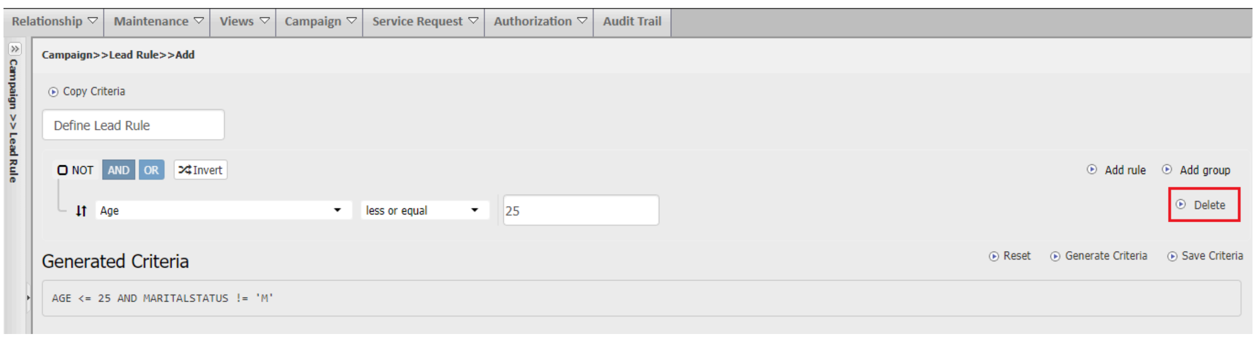
i. (Age greater than 25 (AND) Marital Status is Married) is inverted to (Age less than or equal to 25 (AND) Marital Status is not Married)



Screen: Lead Rule Criteria

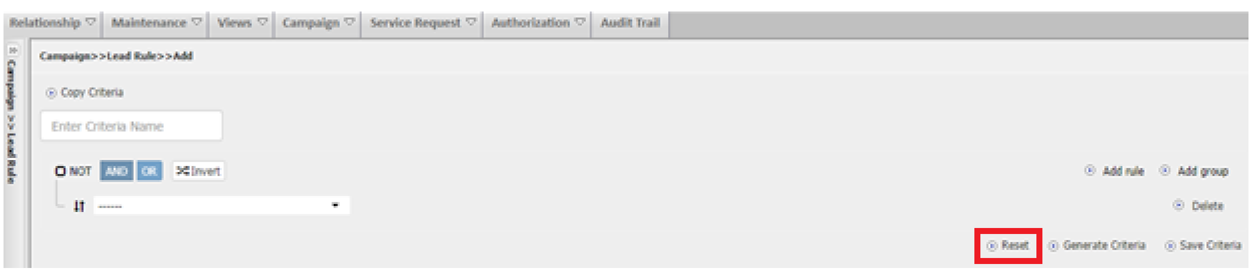
f. Users can delete the criteria by clicking on the "Delete". In the below example marital status criteria can be deleted

i. (Age greater than 25 (AND) Marital Status is Married) to (Age less than or equal to 25)



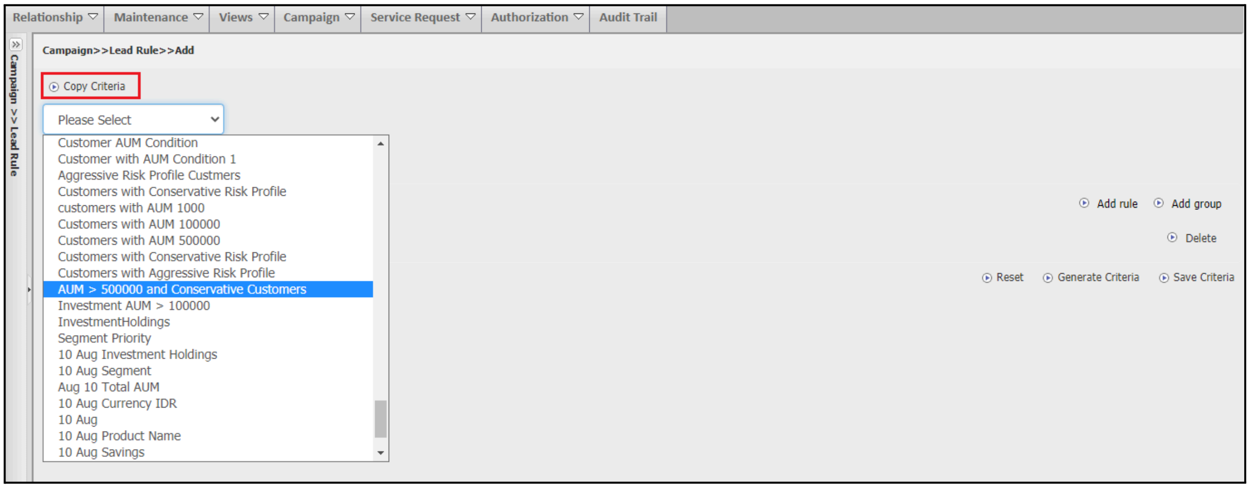
Screen: Lead Rule Criteria

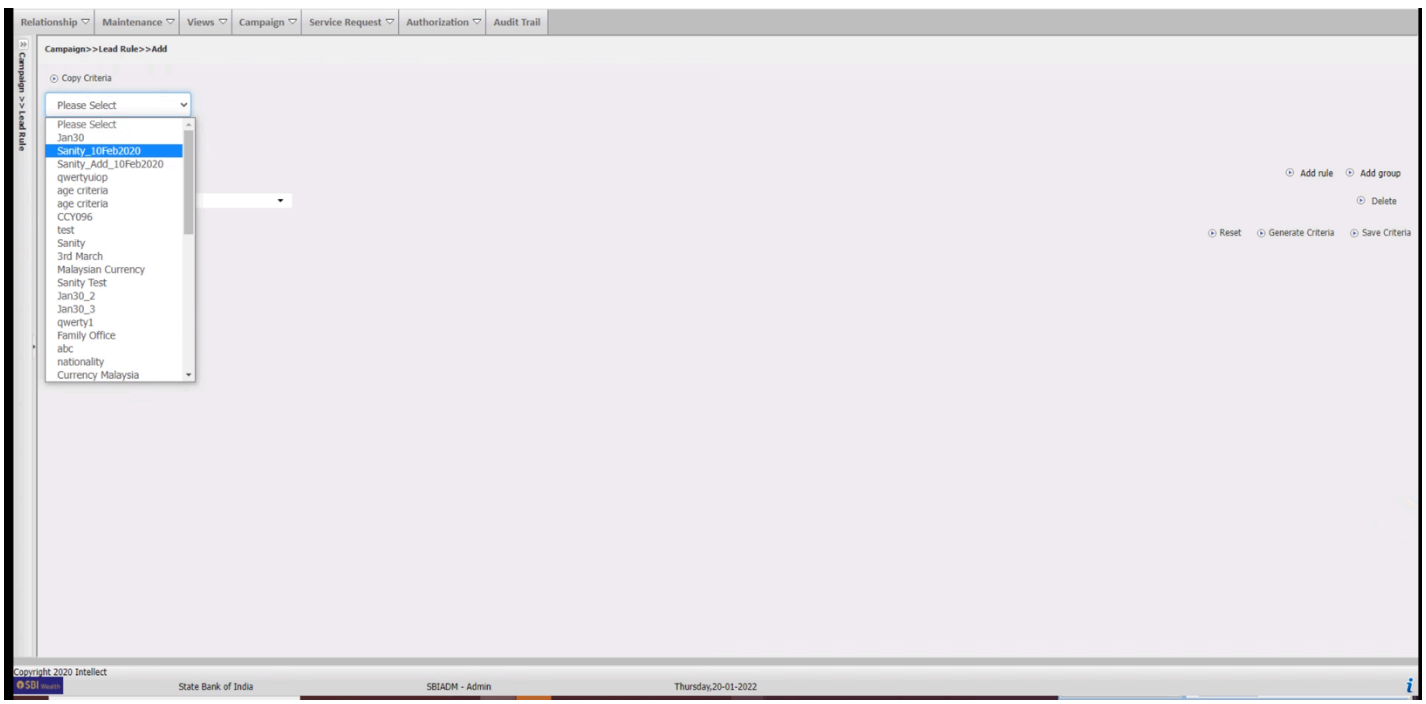
g. Users can reset the entire criteria by clicking on the "Reset"



Screen: Reset Criteria

4. Users can copy existing lead rule criteria already defined by clicking on "Copy Criteria" and selecting the criteria from the dropdown list. The selected criteria can be modified by the user





Screen: Copy Criteria

5. User creates the criteria using the above mentioned steps and clicks on “Save Criteria” to save the lead rule

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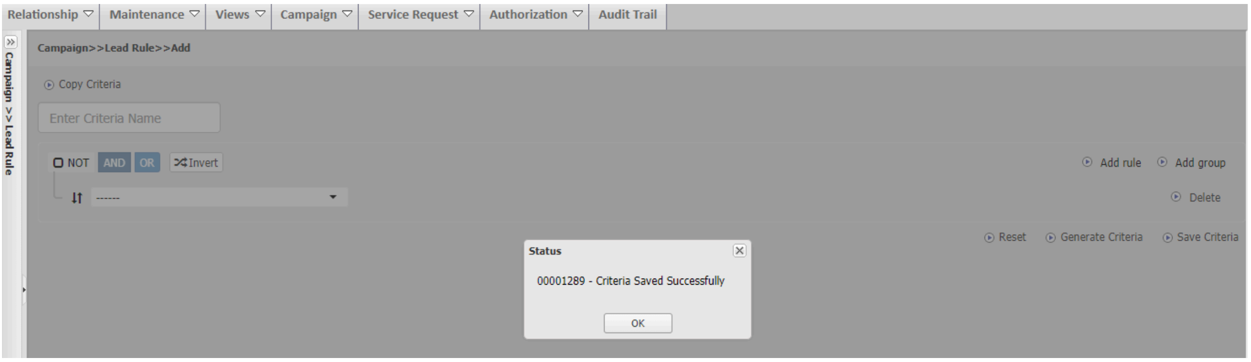
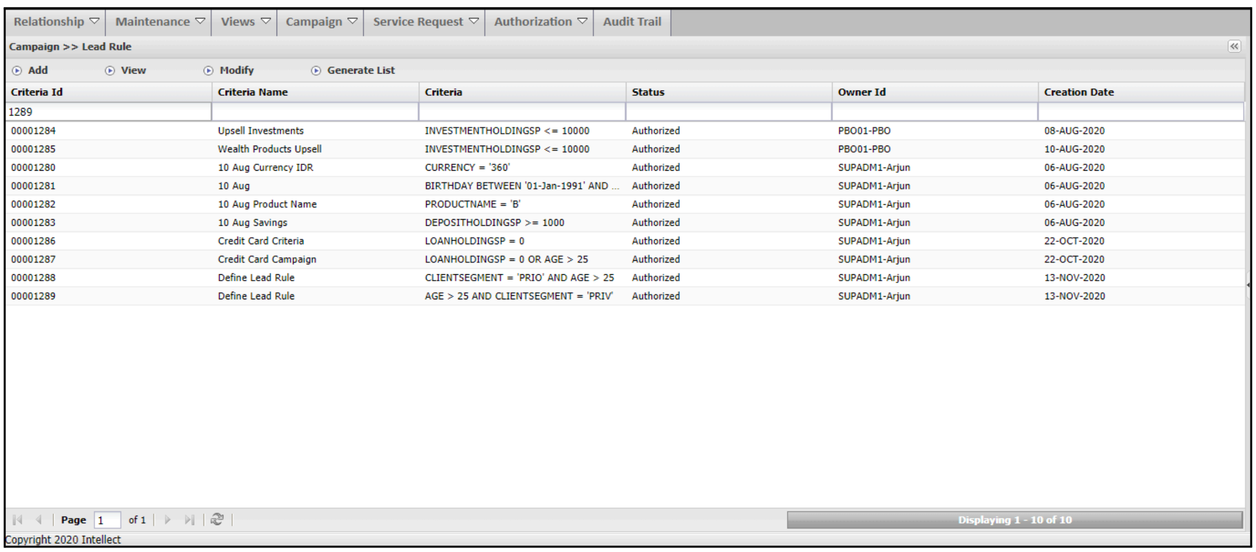


Screen: Save Lead Rule Criteria

6. Users can view the lead rule record saved in the Lead Rule screen



Criteria Id	Criteria Name	Criteria	Status	Owner Id	Creation Date
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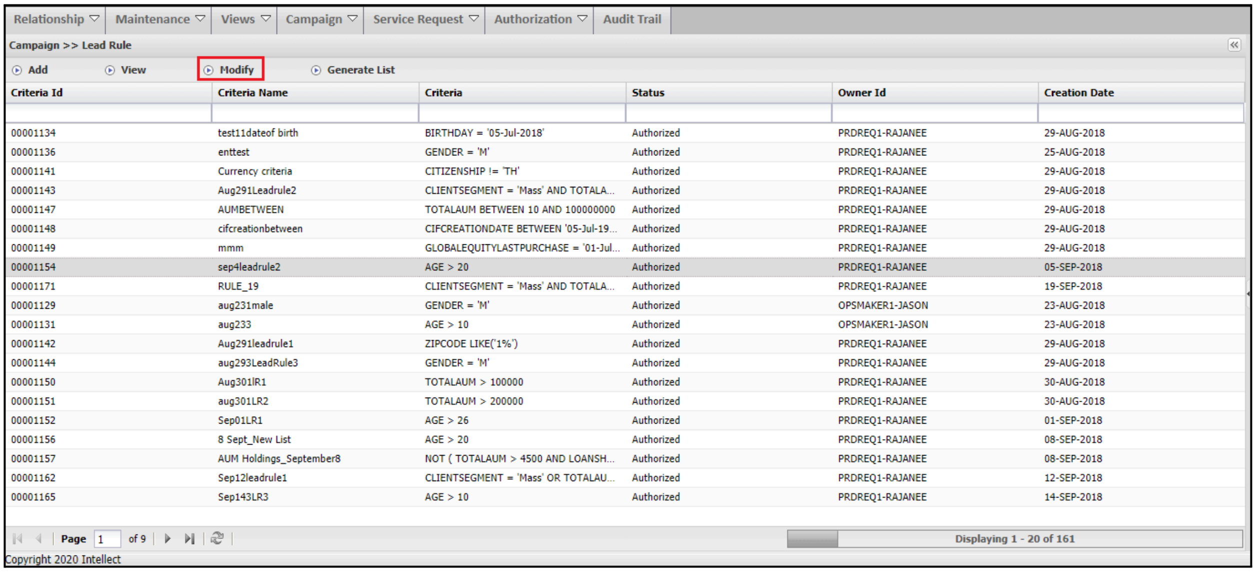
00001284	Upsell Investments	INVESTMENTHOLDINGSP <= 10000	Authorized	PBO01-PBO	08-AUG-2020
00001285	Wealth Products Upsell	INVESTMENTHOLDINGSP <= 10000	Authorized	PBO01-PBO	10-AUG-2020
00001280	10 Aug Currency IDR	CURRENCY = '360'	Authorized	SUPADM1-Arjun	06-AUG-2020
00001281	10 Aug	BIRTHDAY BETWEEN '01-Jan-1991' AND ...	Authorized	SUPADM1-Arjun	06-AUG-2020
00001282	10 Aug Product Name	PRODUCTNAME = 'B'	Authorized	SUPADM1-Arjun	06-AUG-2020
00001283	10 Aug Savings	DEPOSITHOLDINGSP >= 1000	Authorized	SUPADM1-Arjun	06-AUG-2020
00001286	Credit Card Criteria	LOANHOLDINGSP = 0	Authorized	SUPADM1-Arjun	22-OCT-2020
00001287	Credit Card Campaign	LOANHOLDINGSP = 0 OR AGE > 25	Authorized	SUPADM1-Arjun	22-OCT-2020
00001288	Define Lead Rule	CLIENTSEGMENT = 'PRIO' AND AGE > 25	Authorized	SUPADM1-Arjun	13-NOV-2020
00001289	Define Lead Rule	AGE > 25 AND CLIENTSEGMENT = 'PRIV'	Authorized	SUPADM1-Arjun	13-NOV-2020

Screen: View Lead Rule Criteria Record

4.2.1.3 Modify Lead Rule

The Lead Rule criteria added can be modified and saved

1. User selects the criteria record and clicks on the “Modify” button to modify a lead rule



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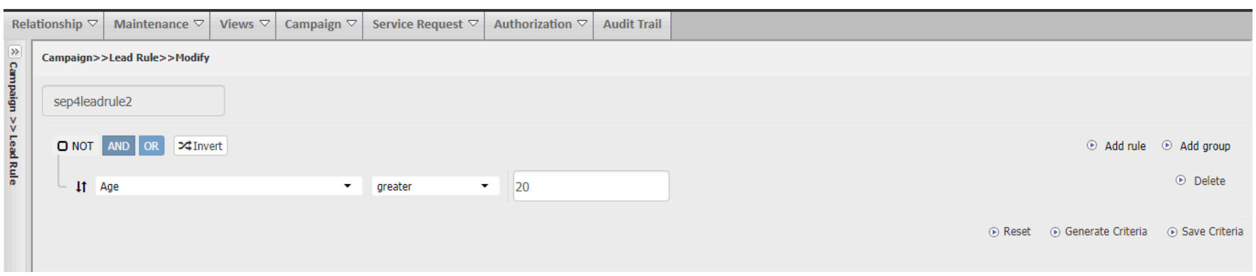
00001165	Sep143LR3	AGE > 10	Authorized	PRDREQ1-RAJANEE	14-SEP-2018

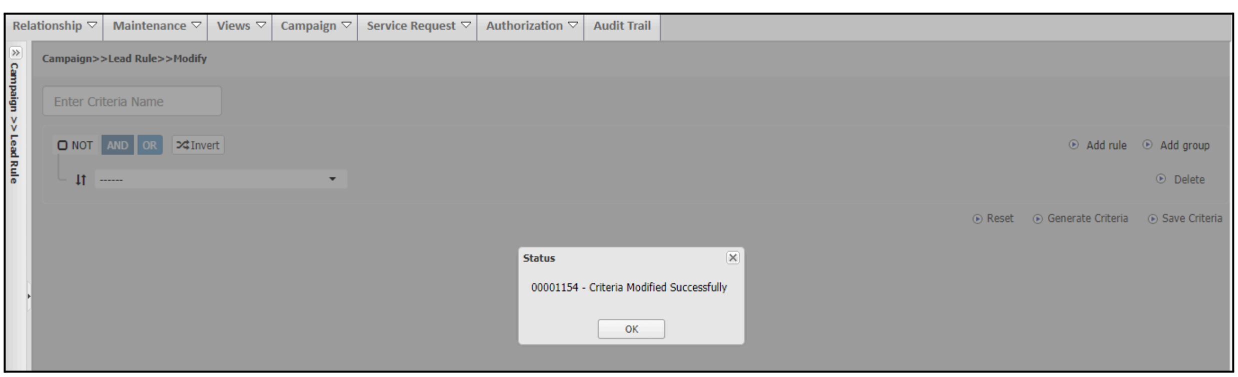
Screen: Select Lead Rule Criteria Record for Modification

2. User modifies the criteria



Screen: Modify Lead Rule Criteria

3. User clicks on the "Save Criteria" button to save the modified lead rule



Screen: Criteria Modified Successfully

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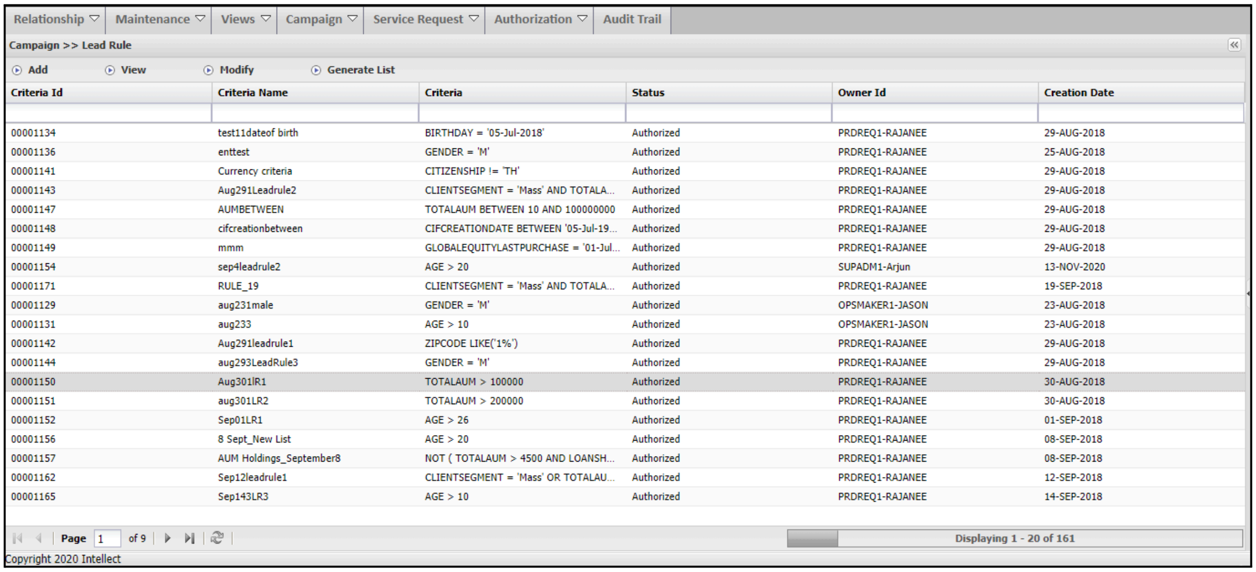
4.2.1.4 View Lead Rule

The Lead Rule criteria can be viewed

1. User selects the criteria record and clicks on the “View” button to view a lead rule



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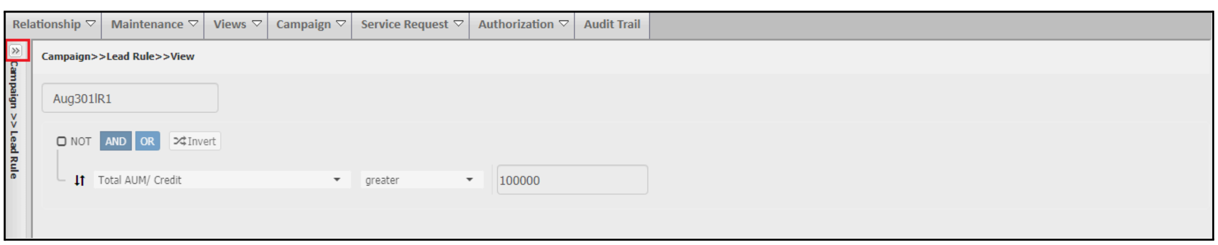
00001141	Currency criteria	CITIZENSHIP != 'TH'	Authorized	PRDREQ1-RAJANEE	29-AUG-2018
00001143	Aug291Leadrule2	CLIENTSEGMENT = 'Mass' AND TOTALA...	Authorized	PRDREQ1-RAJANEE	29-AUG-2018
00001147	AUMBETWEEN	TOTALAUM BETWEEN 10 AND 100000000	Authorized	PRDREQ1-RAJANEE	29-AUG-2018
00001148	cifcreationbetween	CIFCREATIONDATE BETWEEN '05-Jul-19...	Authorized	PRDREQ1-RAJANEE	29-AUG-2018
00001149	mmm	GLOBALEQUITYLASTPURCHASE = '01-Jul...	Authorized	PRDREQ1-RAJANEE	29-AUG-2018
00001154	sep4leadrule2	AGE > 20	Authorized	SUPADM1-Arjun	13-NOV-2020
00001171	RULE_19	CLIENTSEGMENT = 'Mass' AND TOTALA...	Authorized	PRDREQ1-RAJANEE	19-SEP-2018
00001129	aug231male	GENDER = 'M'	Authorized	OPSMAKER1-JASON	23-AUG-2018
00001131	aug233	AGE > 10	Authorized	OPSMAKER1-JASON	23-AUG-2018
00001142	Aug291leadrule1	ZIPCODE LIKE('1%')	Authorized	PRDREQ1-RAJANEE	29-AUG-2018
00001144	aug293LeadRule3	GENDER = 'M'	Authorized	PRDREQ1-RAJANEE	29-AUG-2018
00001150	Aug301lR1	TOTALAUM > 100000	Authorized	PRDREQ1-RAJANEE	30-AUG-2018
00001151	aug301LR2	TOTALAUM > 200000	Authorized	PRDREQ1-RAJANEE	30-AUG-2018
00001152	Sep01LR1	AGE > 26	Authorized	PRDREQ1-RAJANEE	01-SEP-2018
00001156	8 Sept_New List	AGE > 20	Authorized	PRDREQ1-RAJANEE	08-SEP-2018
00001157	AUM Holdings_September8	NOT (TOTALAUM > 4500 AND LOANSH...	Authorized	PRDREQ1-RAJANEE	08-SEP-2018
00001162	Sep12leadrule1	CLIENTSEGMENT = 'Mass' OR TOTALAU...	Authorized	PRDREQ1-RAJANEE	12-SEP-2018
00001165	Sep143LR3	AGE > 10	Authorized	PRDREQ1-RAJANEE	14-SEP-2018

Screen: Select Lead Rule Criteria Record for View

2. User views the criteria and clicks on the double arrow on the left top to return to the “View All Lead Rules” screen

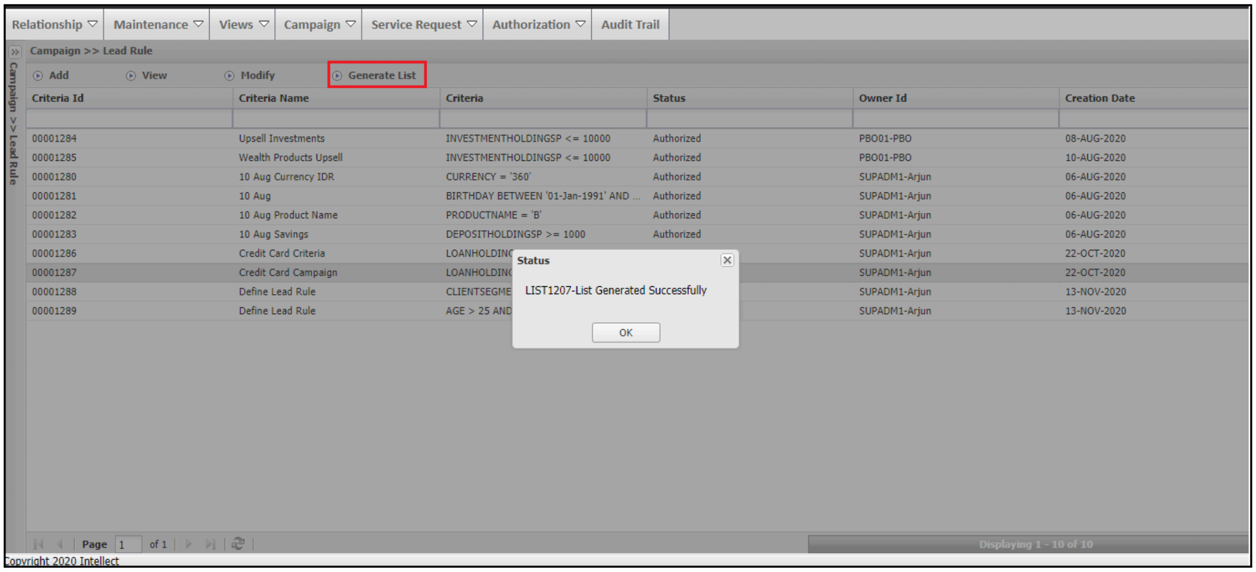


Screen: View Lead Rule Criteria

4.2.1.5 Generate List

The list of customers satisfying the lead rule criteria can be generated using the “Generate List”

1. User selects the criteria record and clicks on the “Generate List” button to generate the list



Screen: Generate Lead List for Lead Rule

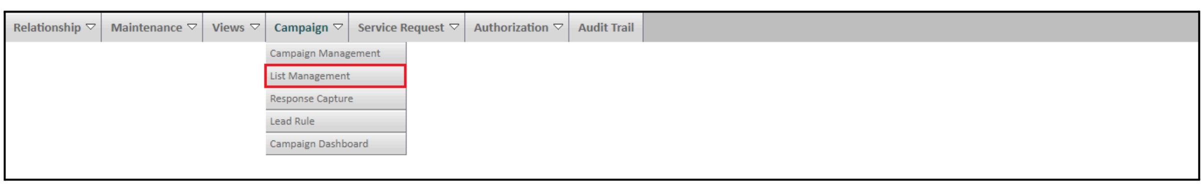
2. Users can view the list in the List Management screen (refer to section 4.2.4 List Management)

4.2.2 Lead Upload

The user can upload a list from third party systems (refer to Section 8 Annexure for Upload Template)

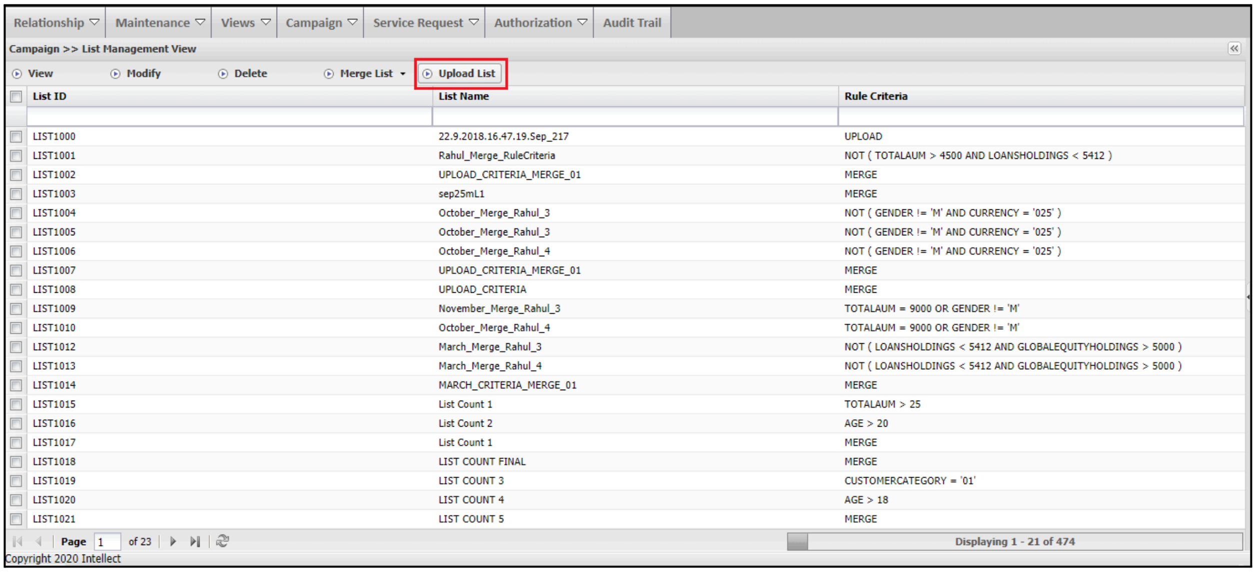
4.2.2.1 Upload Lead List

1. User hovers on the “Campaign” menu and selects the “List Management” sub menu



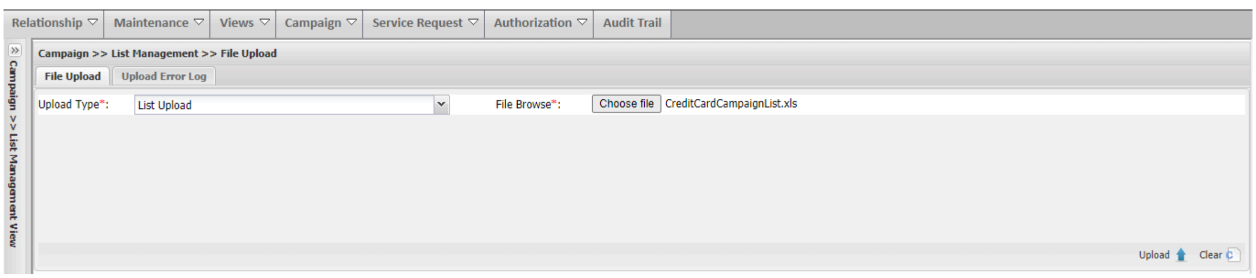
Screen: Upload Lead List Navigation

2. User clicks on the “Upload List” button. The file upload menu loads up



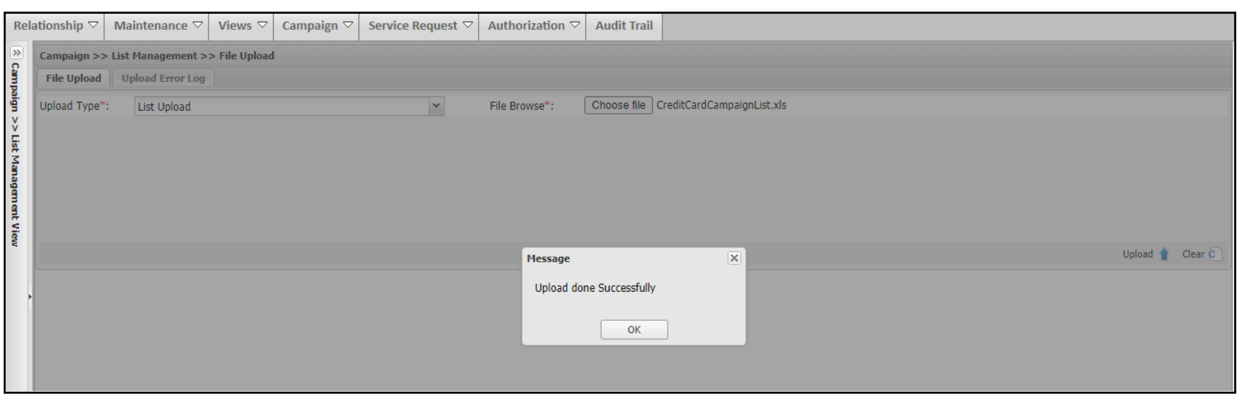
Screen: Upload Lead List Navigation - Upload Lead List

3. User selects the "List Upload" from the dropdown in the Upload Type field and clicks on "Choose File" to select the lead list file (.xls or .csv) to be uploaded



Screen: Choose Lead List for Upload

4. User clicks on the "Upload" button to upload the list



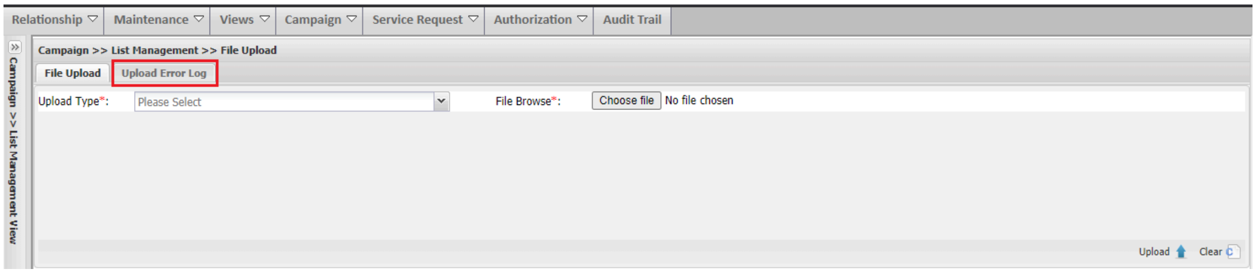
Screen: Lead List –Uploaded

5. All the lead lists successfully uploaded can be viewed in the List Management screen

4.2.2.2 Review Upload Result - View All Error Log Records

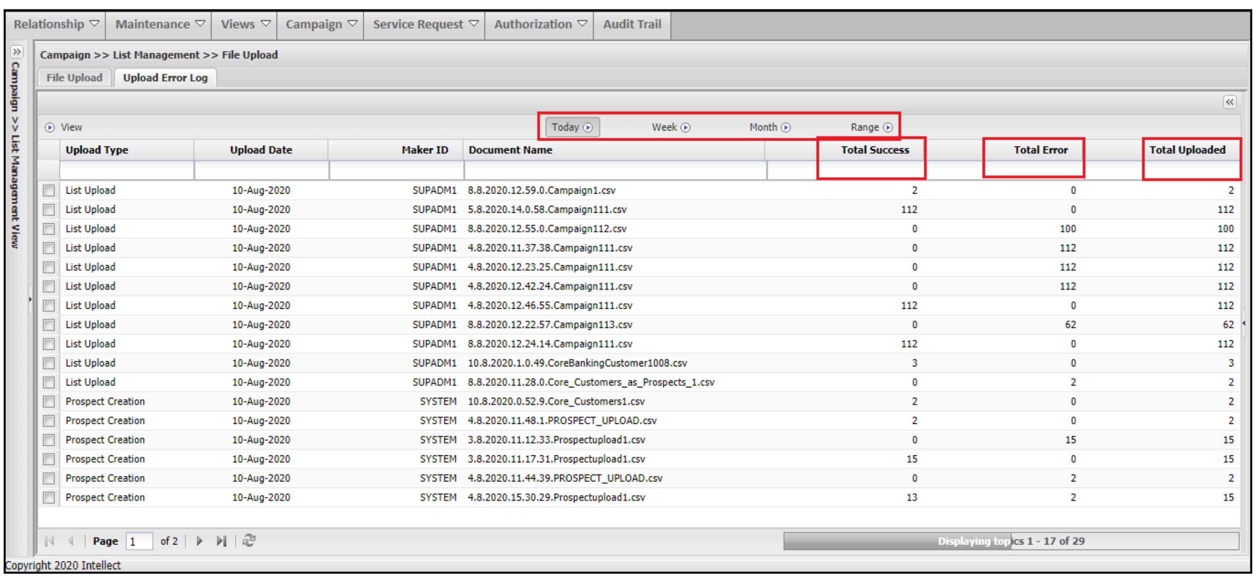
After the upload, the system displays the result of the same in Upload Log

1. User clicks on “Upload Error Log” for viewing the result of the upload



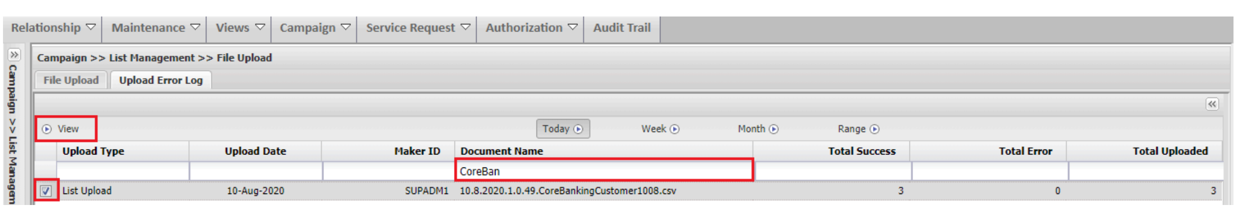
Screen: Upload Error Log Navigation

2. User views the list of all files uploaded successfully. The user can check the Total Success, Total Error and Total Uploaded records information for the file uploaded. System allows to filter the records based on uploads done today, week, month and date range



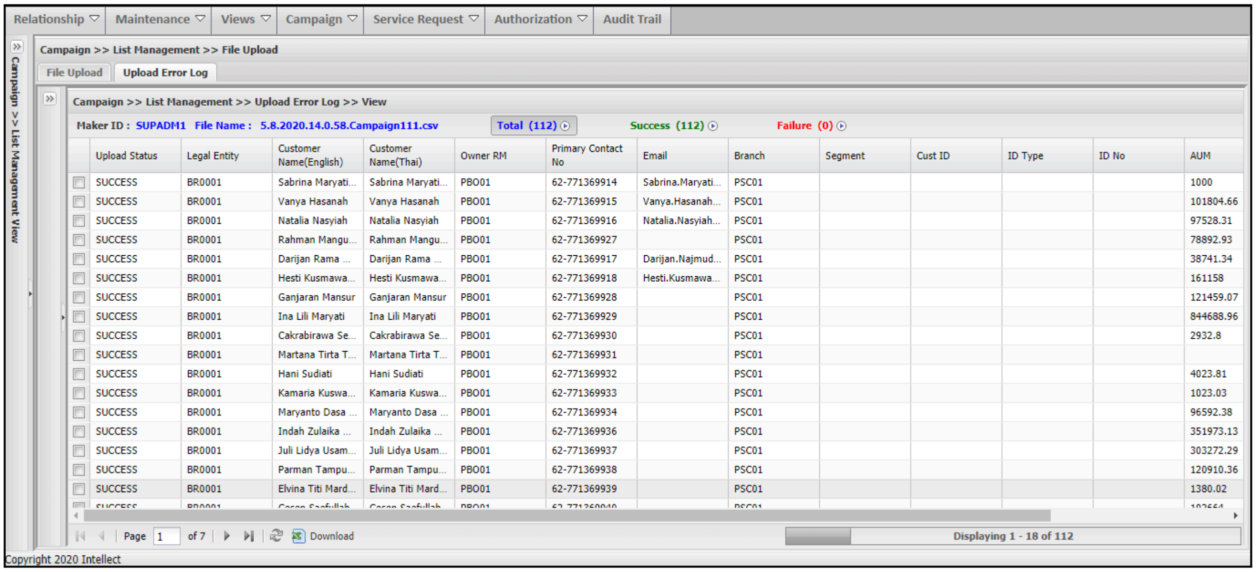
Screen: Upload Error Log Summary

3. The user can search the file name, selects the record and clicks on “View” to view the detailed summary of the upload result



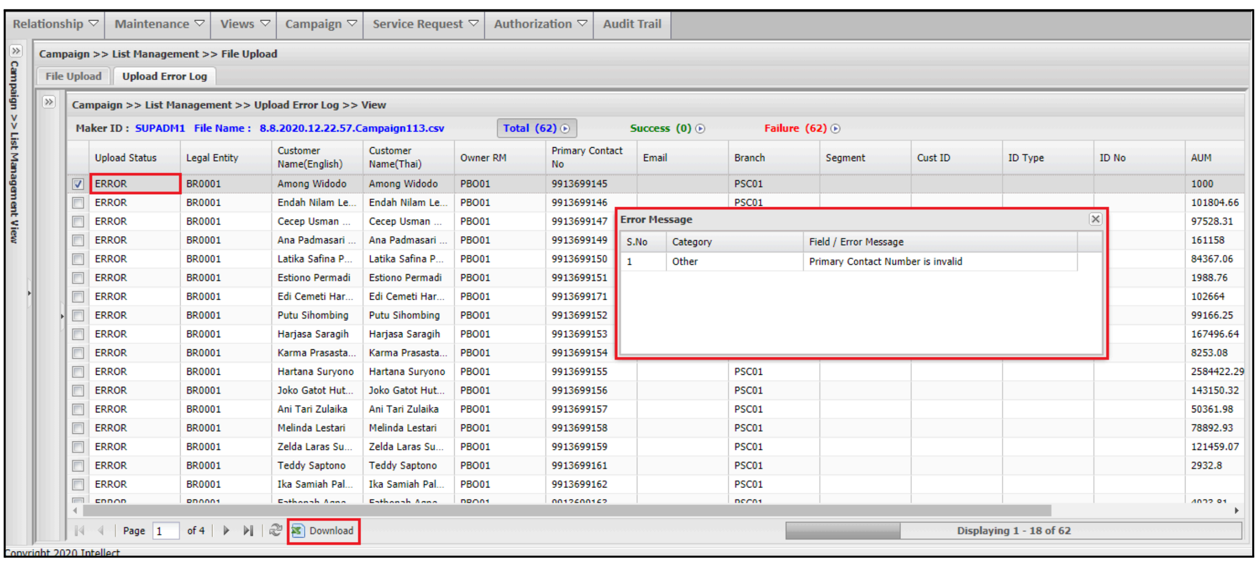
Screen: Select Error Log Record for View

4. User views the detailed log summary of the lead list file uploaded. The user can further drill down to the record level and check the status (Success/Error) displayed against each record



Screen: View Error Log Detailed Summary

5. The user can check the reason for error records by clicking on the "Error" status against the error record. All the records can be downloaded in an excel file by clicking on the "Download" button



Screen: View Error Record with Error Details

6. The user can re-upload the error records again after fixing the error. This will be created as a separate list in the system. All the lead lists successfully uploaded can be viewed in the List Management screen

4.2.3 Manual Lead Creation

Leads can be manually created and linked to campaigns in case they were identified after a campaign was created. This

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has been discussed in details in the Journey of Lead to Prospect and Prospect to Customer document

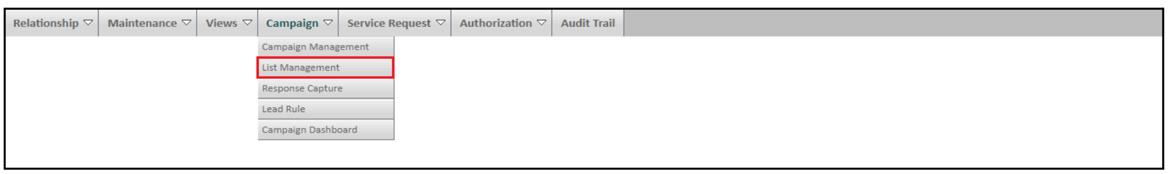
4.2.4 List Management

List Management screen allows the users to view the leads lists present in the system. List Management allows the user to perform the below actions:

a. View List
b. Modify List
c. Merge List
d. Delete List

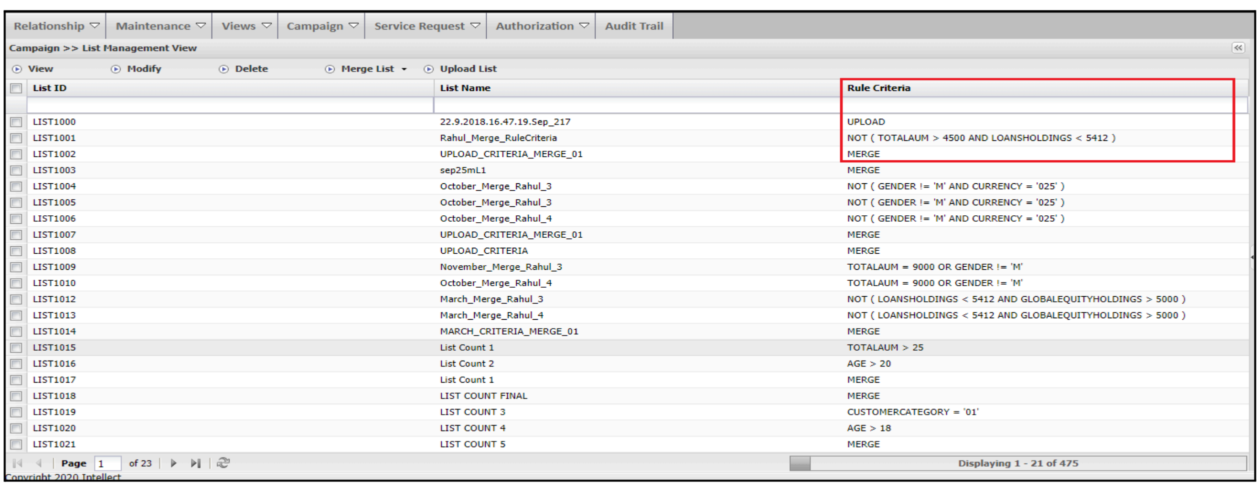
NOTE: The lead lists present in the List Management screen will be available for attaching to a Campaign during the Campaign Definition process

1. User hovers on the "Campaign" menu and selects the "List Management" sub menu



Screen: Upload Lead List Navigation

2. The user can view all the existing and newly created lead lists in the system. In the case where lists are generated using the lead rule criteria, the criteria is displayed in the Rule Criteria column. For the lists created by lead upload or merging the lead lists (UPLOAD, MERGE), the same is displayed in the Rule Criteria Column

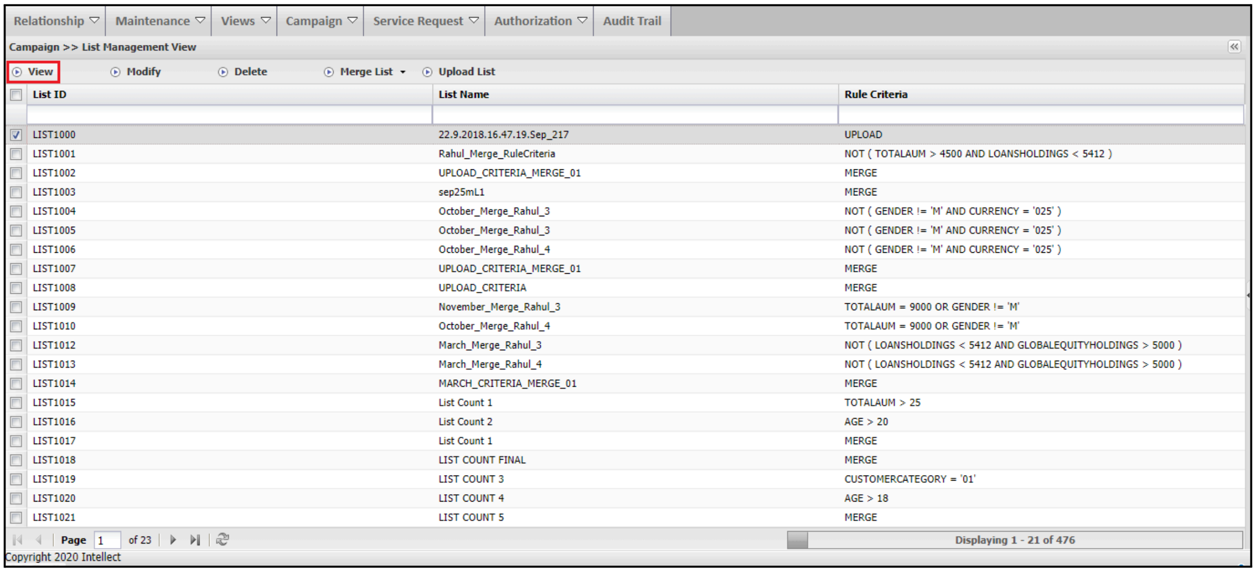


List ID	List Name	Rule Criteria
LIST1000	22.9.2018.16.47.19.Sep_217	UPLOAD
LIST1001	Rahul_Merge_RuleCriteria	NOT (TOTALAUM > 4500 AND LOANSHOLDINGS < 5412)
LIST1002	UPLOAD_CRITERIA_MERGE_01	MERGE
LIST1003	sep25mL1	MERGE
LIST1004	October_Merge_Rahul_3	NOT (GENDER != 'M' AND CURRENCY = '025')
LIST1005	October_Merge_Rahul_3	NOT (GENDER != 'M' AND CURRENCY = '025')
LIST1006	October_Merge_Rahul_4	NOT (GENDER != 'M' AND CURRENCY = '025')
LIST1007	UPLOAD_CRITERIA_MERGE_01	MERGE
LIST1008	UPLOAD_CRITERIA	MERGE
LIST1009	November_Merge_Rahul_3	TOTALAUM = 9000 OR GENDER != 'M'
LIST1010	October_Merge_Rahul_4	TOTALAUM = 9000 OR GENDER != 'M'
LIST1012	March_Merge_Rahul_3	NOT (LOANSHOLDINGS < 5412 AND GLOBALEQUITYHOLDINGS > 5000)
LIST1013	March_Merge_Rahul_4	NOT (LOANSHOLDINGS < 5412 AND GLOBALEQUITYHOLDINGS > 5000)
LIST1014	MARCH_CRITERIA_MERGE_01	MERGE
LIST1015	List Count 1	TOTALAUM > 25
LIST1016	List Count 2	AGE > 20
LIST1017	List Count 1	MERGE
LIST1018	LIST COUNT FINAL	MERGE
LIST1019	LIST COUNT 3	CUSTOMERCATEGORY = '01'
LIST1020	LIST COUNT 4	AGE > 18
LIST1021	LIST COUNT 5	MERGE

Screen: List Management Screen

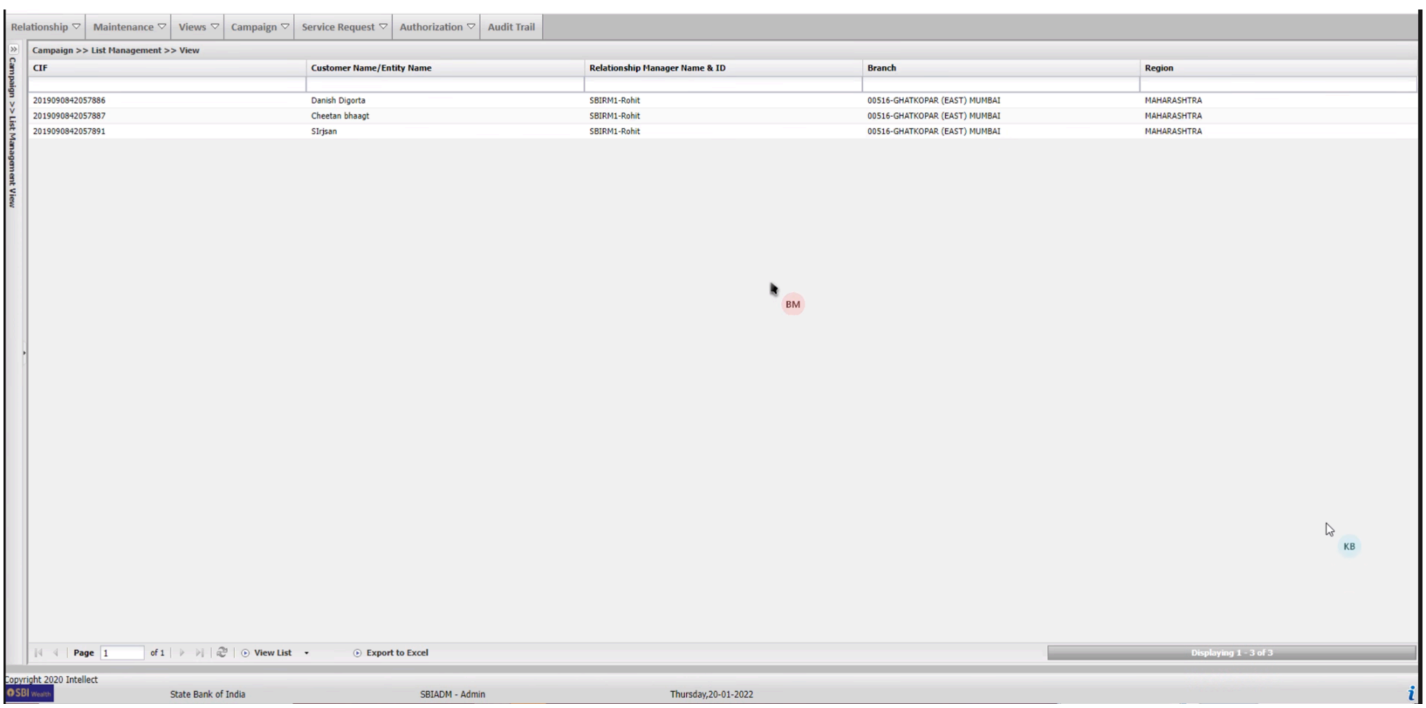
4.2.4.1 View Lead List

1. User selects the Lead List and clicks on the "View" button to view the list



Screen: View the Lead List

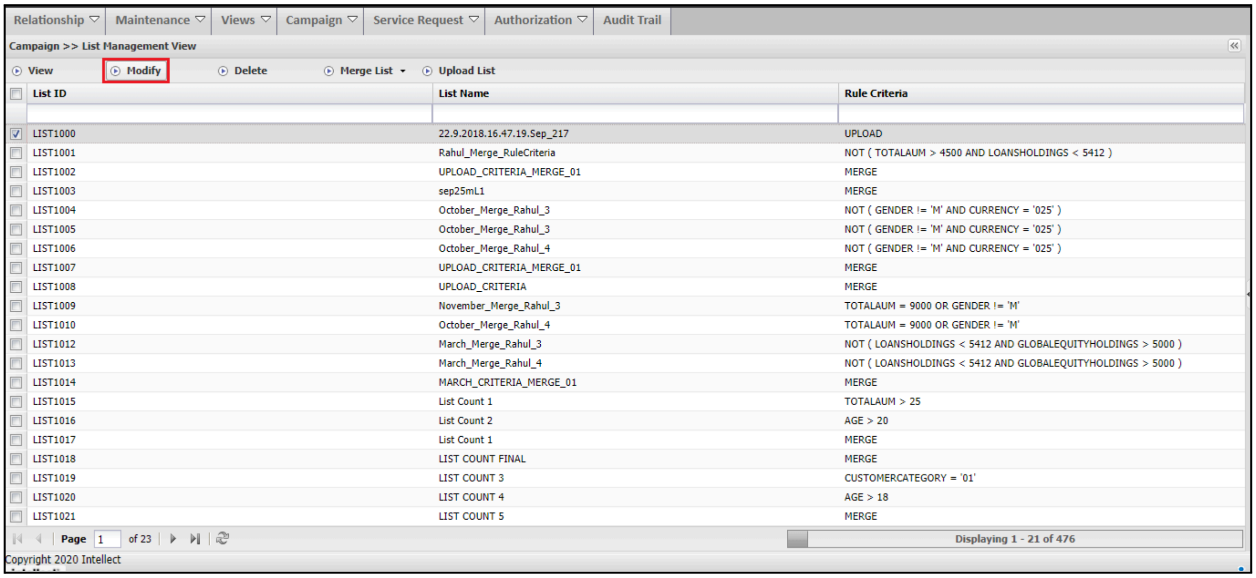
2. User views the Lead List Information and clicks on the "Double Arrow" button to navigate back to the list management



Screen: View the Lead List - Leads Information

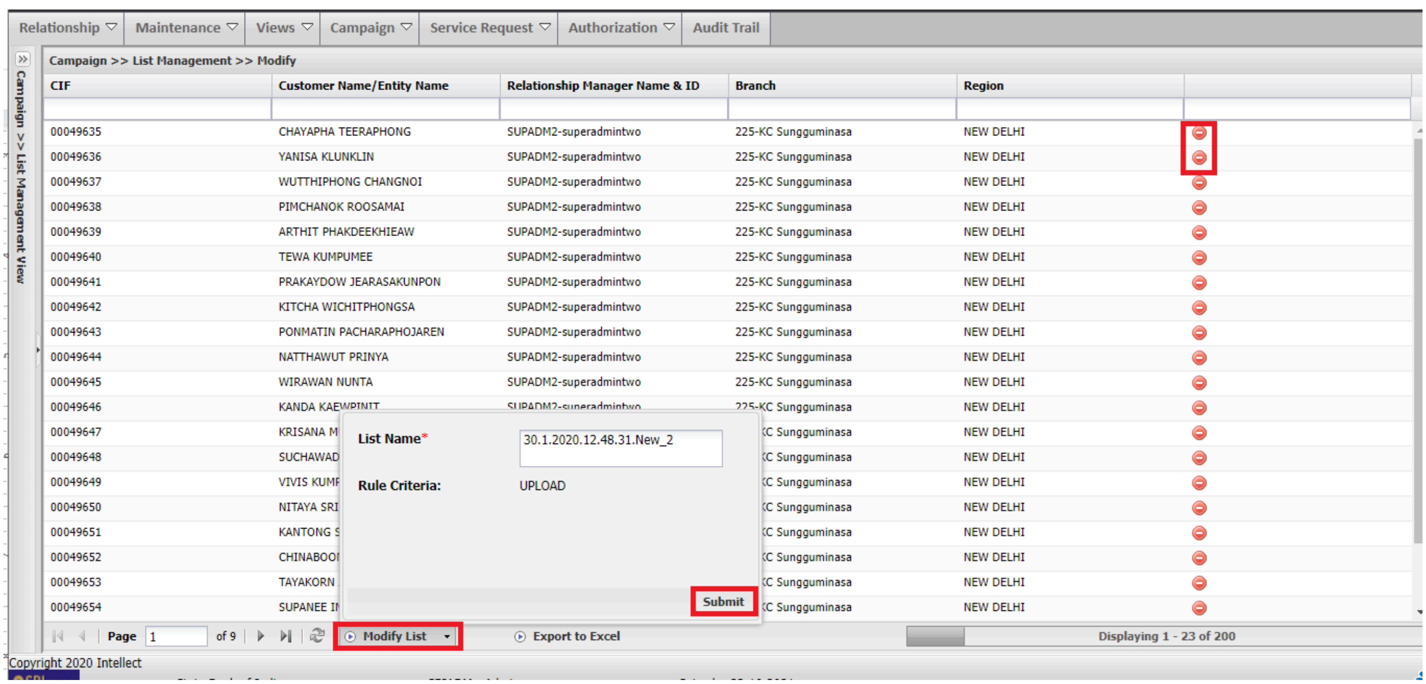
4.2.4.2 Modify Lead List

1. User selects the Lead List and clicks on the "Modify" button to modify the list



Screen: Modify the Lead List

2. User clicks on the "Remove" button against the lead record to remove the lead from the list and clicks on "Modify List" and "Submit" to modify the list

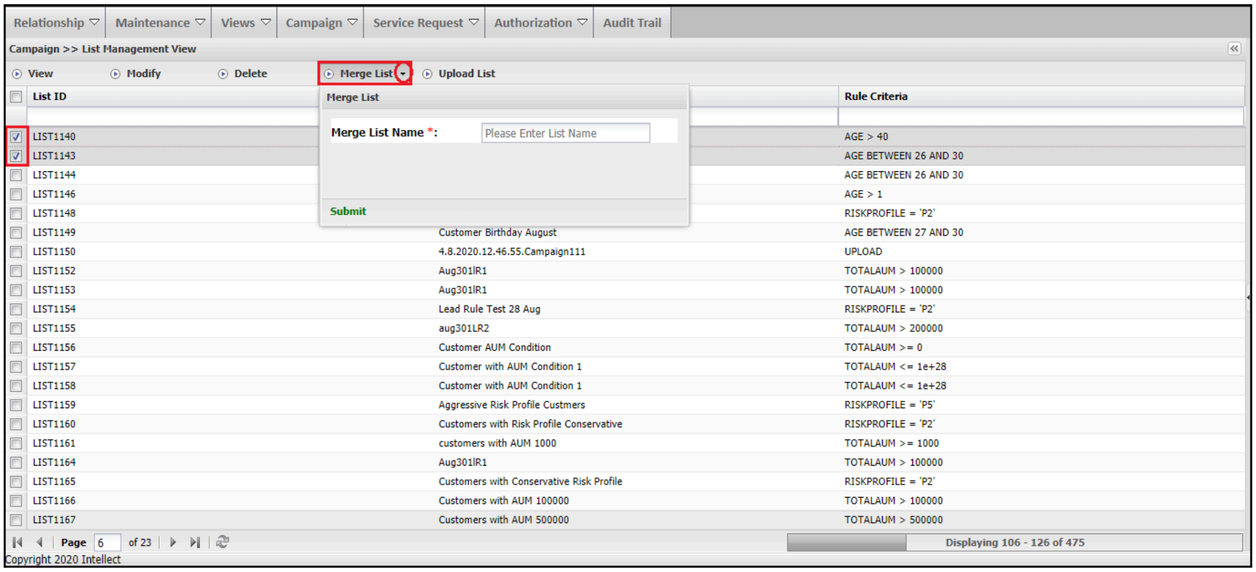


Screen: Remove the Lead from Lead List

4.2.4.3 Merge Lead Lists

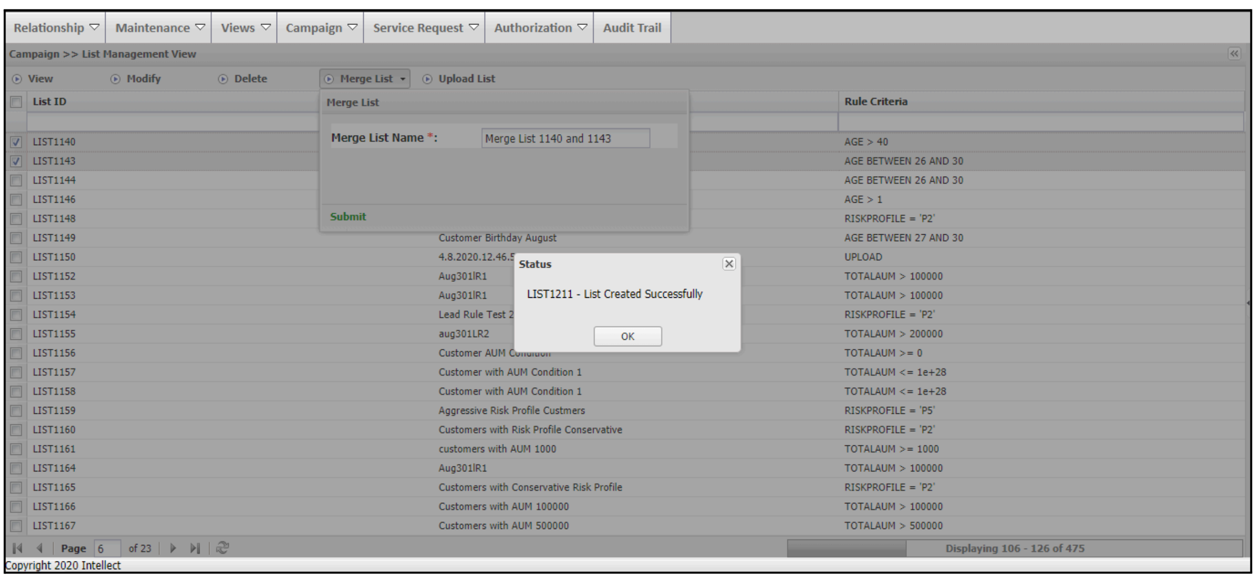
Multiple lists present in the list management can be merged to create a single list. This will be created as a new list in the system

1. User selects the lists by clicking on the checkbox available against each record and clicks on the “Merge List” arrow symbol



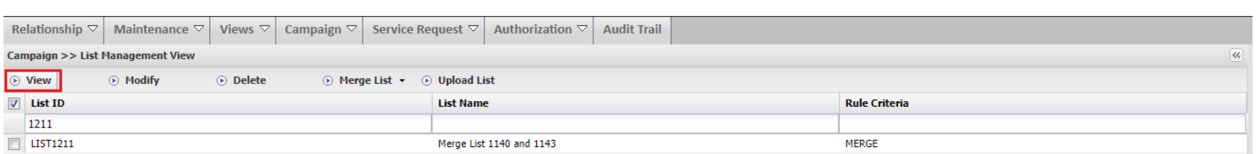
Screen: Merge Lead Lists

2. User inputs the list name for the merged list and clicks on “Submit” and a new list is created



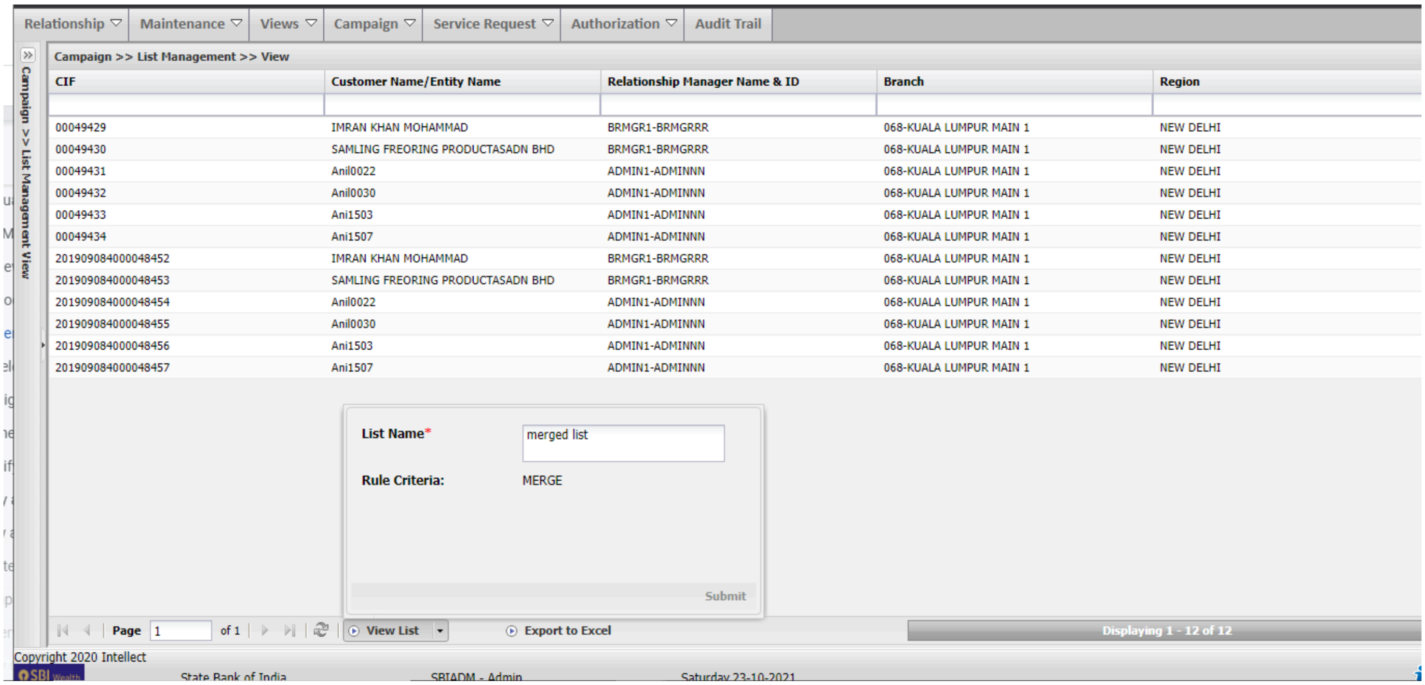
Screen: Creating Merged Lead List

3. User selects the merged lead list record and clicks on the “View” button to view the leads



Screen: Select the Merged Lead List for View

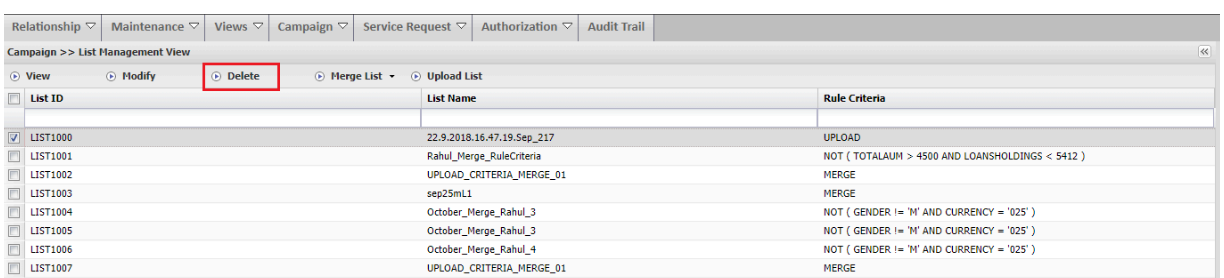
4. The user can view the list of leads present in the merged lead list. A List created by merging multiple existing lists will be checked for uniqueness at record level on the following parameters:
    a. Customer Name(English) + Primary Contact No
    b. Customer Name(English) + Email
    c. Customer Name(Local Language) + Primary Contact No
    d. Customer Name(Local Language) + Email



Screen: View Merged Lead List

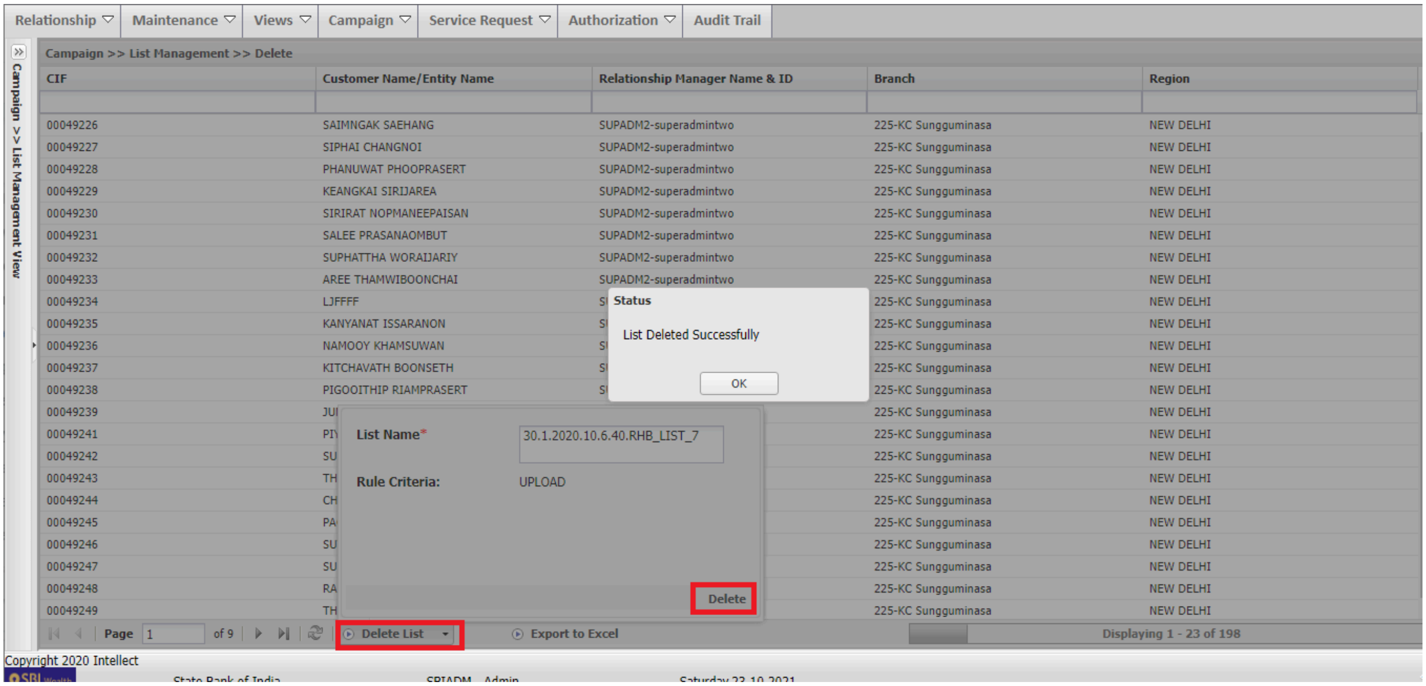
4.2.4.4 Delete Lead List

1. User selects the Lead List and clicks on the "Delete" button to delete the list



Screen: Delete Lead List

2. User clicks on the "Delete List" and "Submit" to delete the list



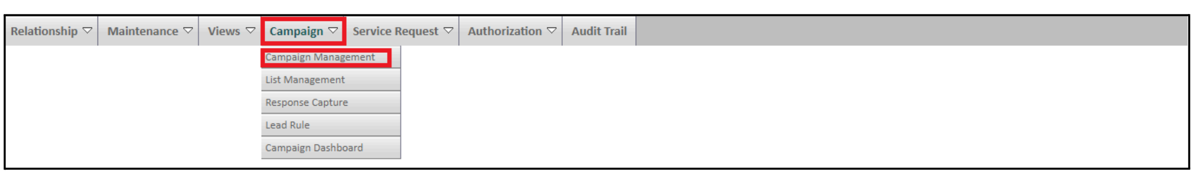
Screen: Delete Lead List

4.3 Campaign Management

The next step in this journey is to use the List of Leads generated/uploaded to create a campaign. Once the user has the list, they can use it in a campaign that they wish to run. In this step, the User can perform the following actions:

- 4.3.1 Define a New Campaign
- 4.3.2 Modify an Existing Campaign
- 4.3.3 Copy a Campaign
- 4.3.4 View a campaign
- 4.3.5 Delete a Campaign
- 4.3.6 Campaign Communication
- 4.3.7 Supervisor Approval
- 4.3.8 View Campaign Dashboard
- 4.3.9 Capture Responses
- 4.3.10 File Call Report

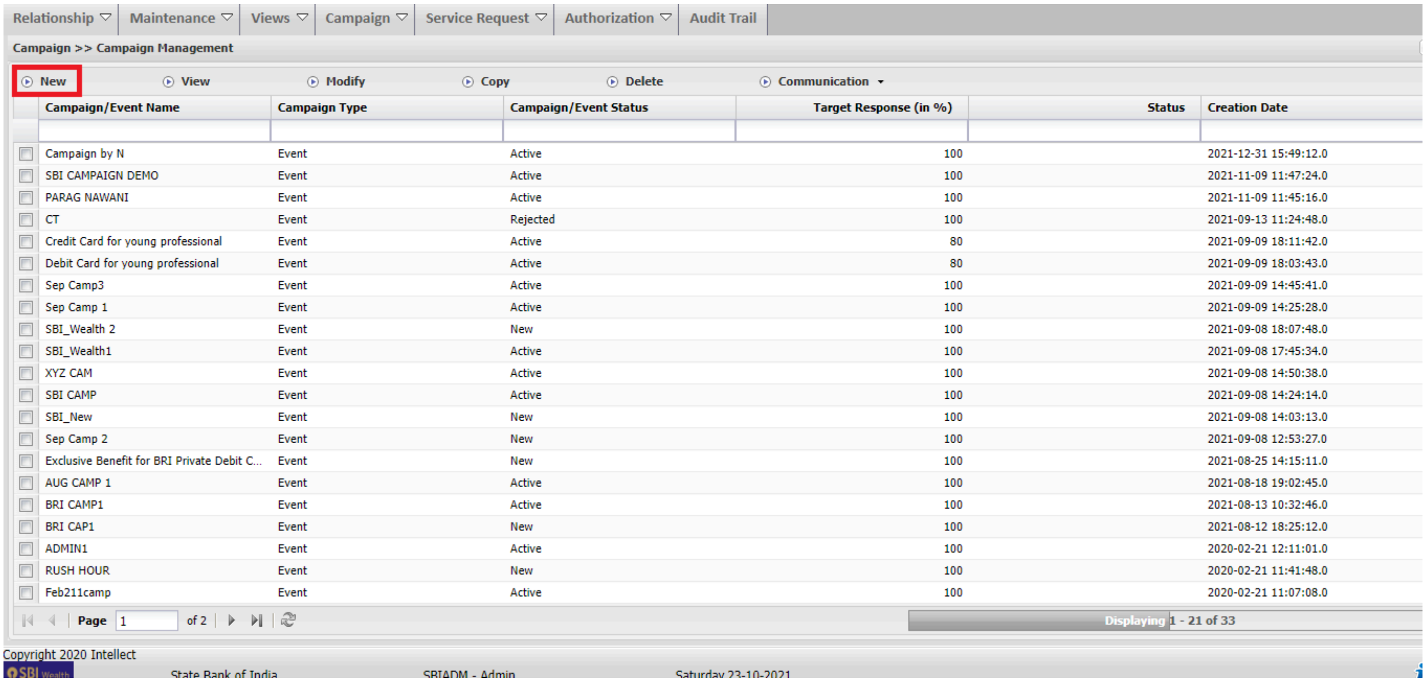
User logs into Customer Profile Desk, hovers over “Campaign” and selects “Campaign Management” from the dropdown to navigate to the Campaign Management screen



Screen: Navigate to the Campaign Management screen

4.3.1 Define a New Campaign

1. On the Campaign Management screen, the User clicks on the “New” button to navigate to the New Campaign screen, where they can create a new campaign



Relationship | Maintenance | Views | Campaign | Service Request | Authorization | Audit Trail

Campaign >> Campaign Management

New | View | Modify | Copy | Delete | Communication

Campaign/Event Name	Campaign Type	Campaign/Event Status	Target Response (in %)	Status	Creation Date
Campaign by N	Event	Active	100		2021-12-31 15:49:12.0
SBI CAMPAIGN DEMO	Event	Active	100		2021-11-09 11:47:24.0
PARAG NAWANI	Event	Active	100		2021-11-09 11:45:16.0
CT	Event	Rejected	100		2021-09-13 11:24:48.0
Credit Card for young professional	Event	Active	80		2021-09-09 18:11:42.0
Debit Card for young professional	Event	Active	80		2021-09-09 18:03:43.0
Sep Camp3	Event	Active	100		2021-09-09 14:45:41.0
Sep Camp 1	Event	Active	100		2021-09-09 14:25:28.0
SBI_Wealth 2	Event	New	100		2021-09-08 18:07:48.0
SBI_Wealth1	Event	Active	100		2021-09-08 17:45:34.0
XYZ CAM	Event	Active	100		2021-09-08 14:50:38.0
SBI CAMP	Event	Active	100		2021-09-08 14:24:14.0
SBI_New	Event	New	100		2021-09-08 14:03:13.0
Sep Camp 2	Event	New	100		2021-09-08 12:53:27.0
Exclusive Benefit for BRI Private Debit C...	Event	New	100		2021-08-25 14:15:11.0
AUG CAMP 1	Event	Active	100		2021-08-18 19:02:45.0
BRI CAMP1	Event	Active	100		2021-08-13 10:32:46.0
BRI CAP1	Event	New	100		2021-08-12 18:25:12.0
ADMIN1	Event	Active	100		2020-02-21 12:11:01.0
RUSH HOUR	Event	New	100		2020-02-21 11:41:48.0
Feb211camp	Event	Active	100		2020-02-21 11:07:08.0

Page 1 of 2 — Displaying 1 - 21 of 33

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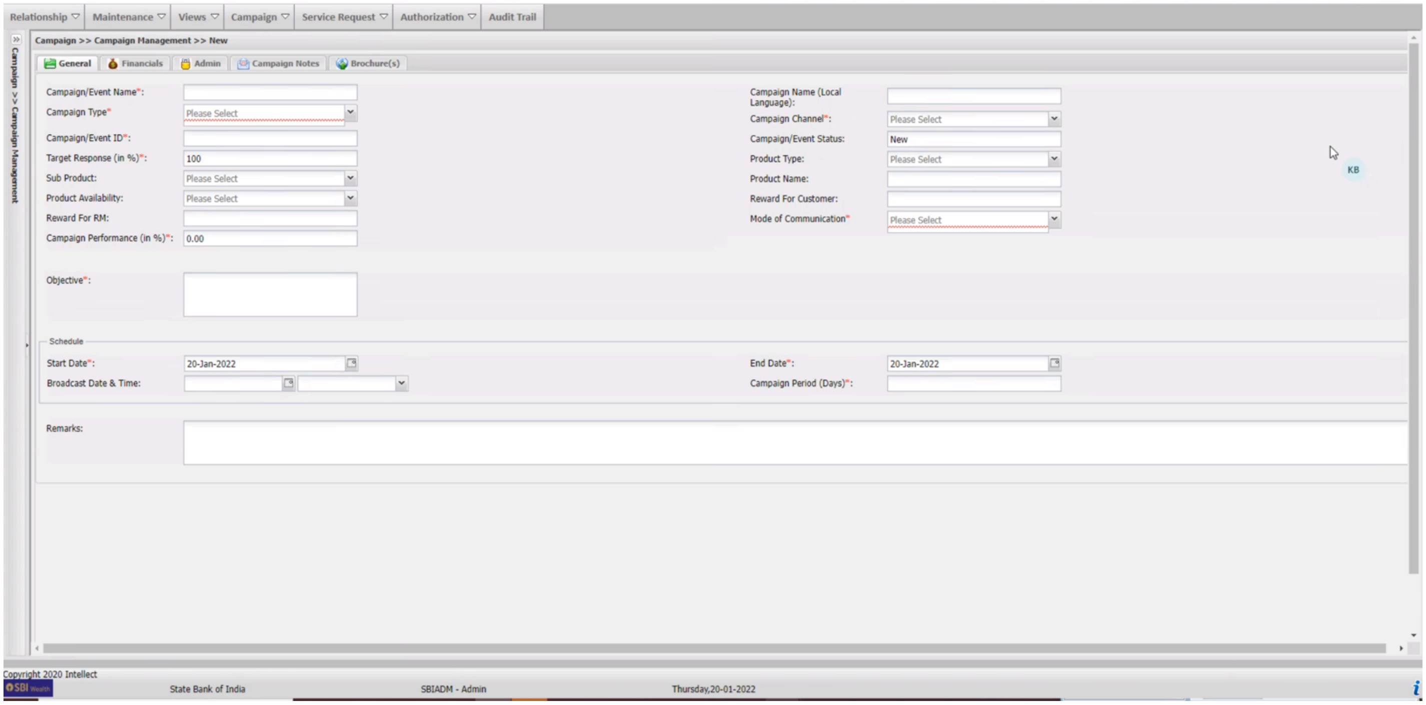
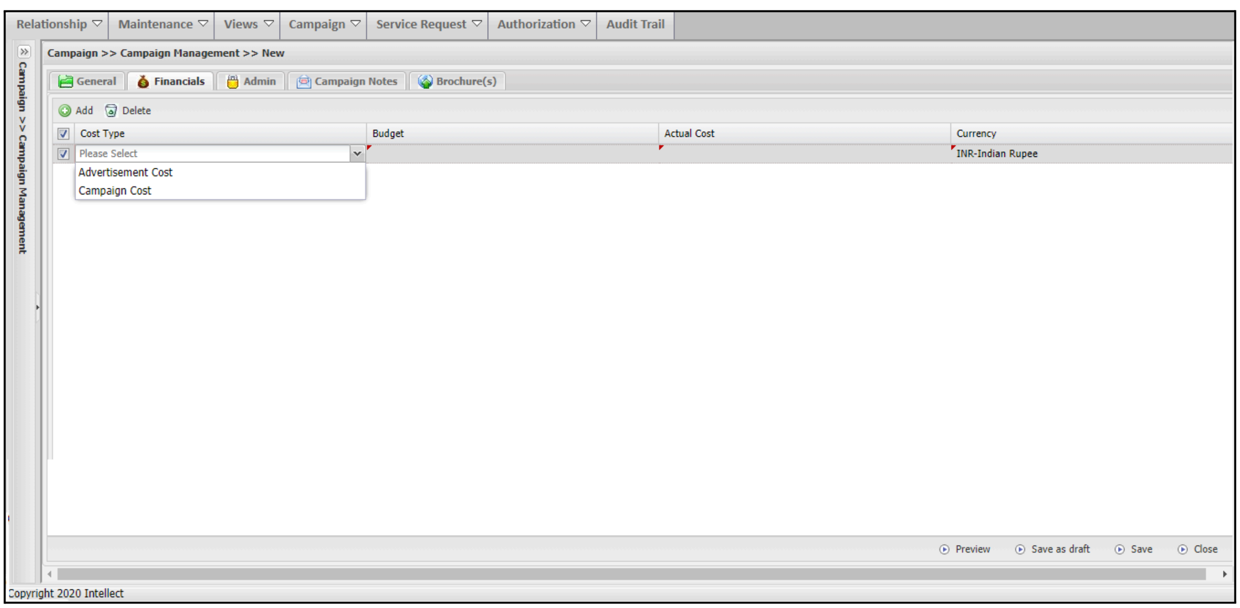
Screen: Define a New Campaign

2. On the New Campaign screen, the User can navigate through the following tabs to capture campaign details:
    a. **General** - Capture General information such as Campaign Name, Channel etc.



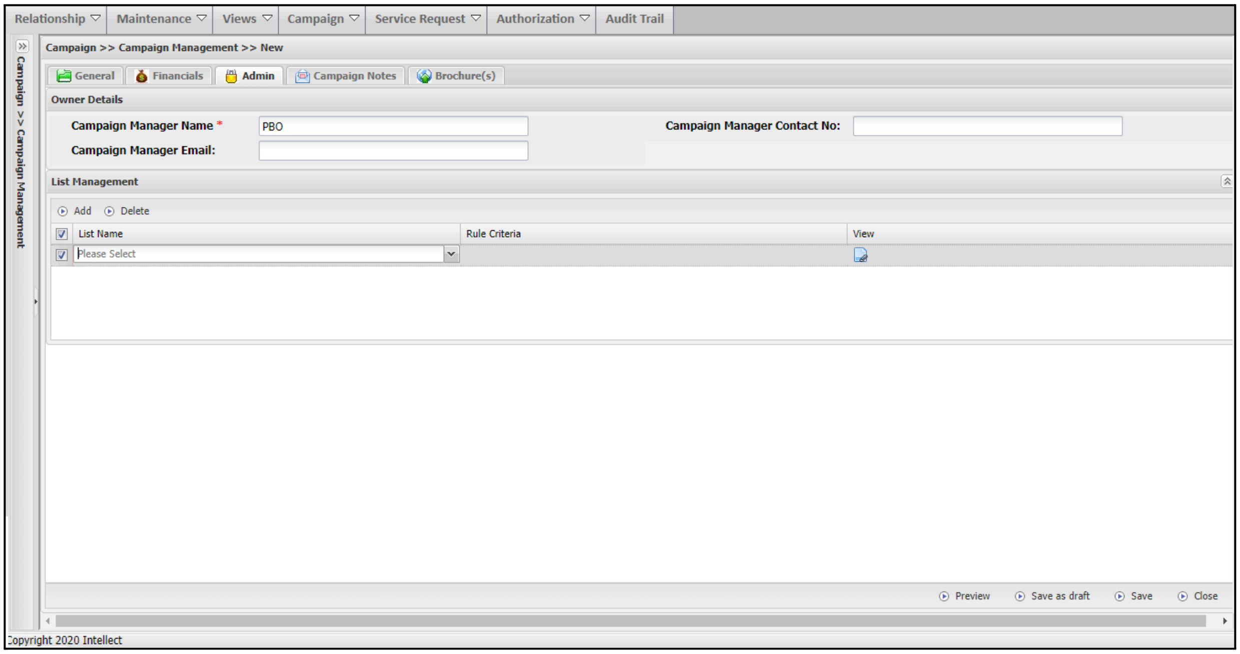
Screen: Capture General Information

b. **Financial** - Capture Financials such as Advertisement and Budget cost



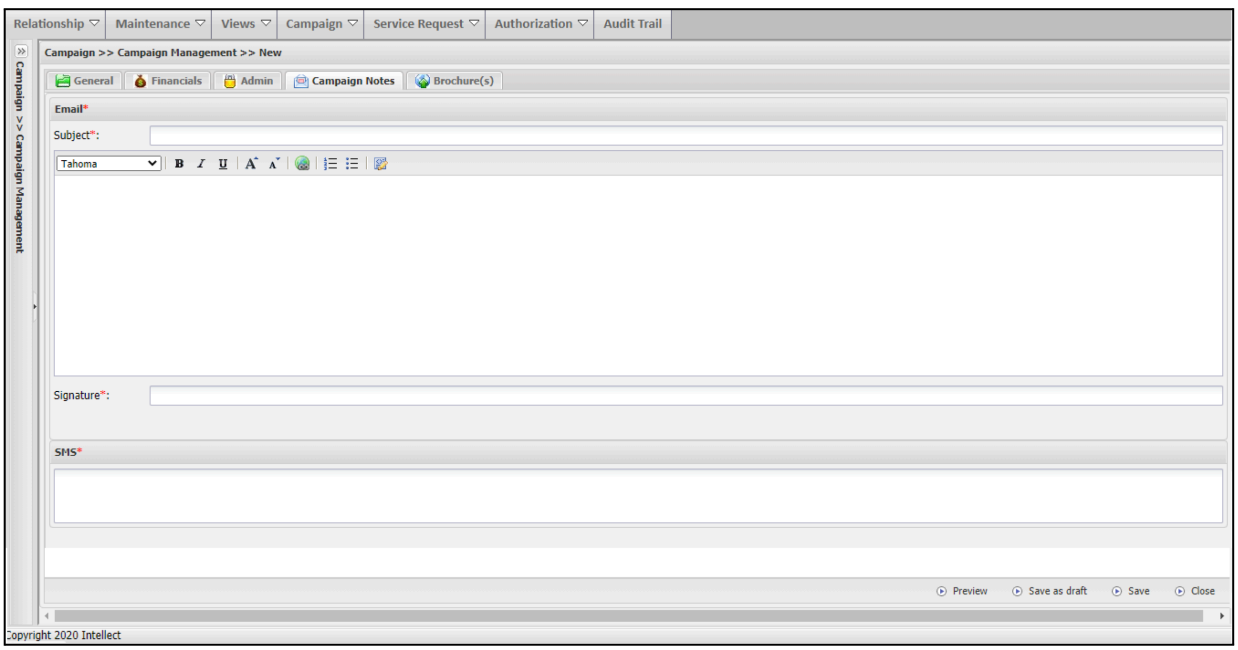
Screen: Capture Financial Information

c. **Admin** - Capture Campaign Manager details, select the target List



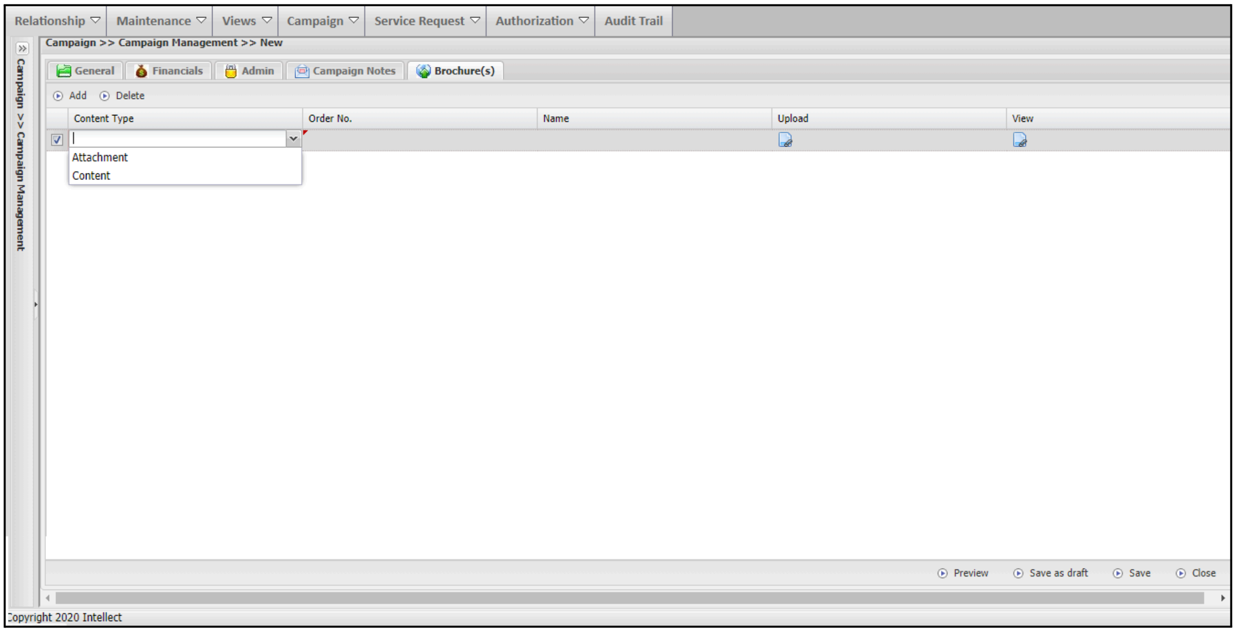
Screen: Capture Admin details

d. **Campaign Notes** - Capture content for the Email and/or SMS that will be sent out as part of the campaign.



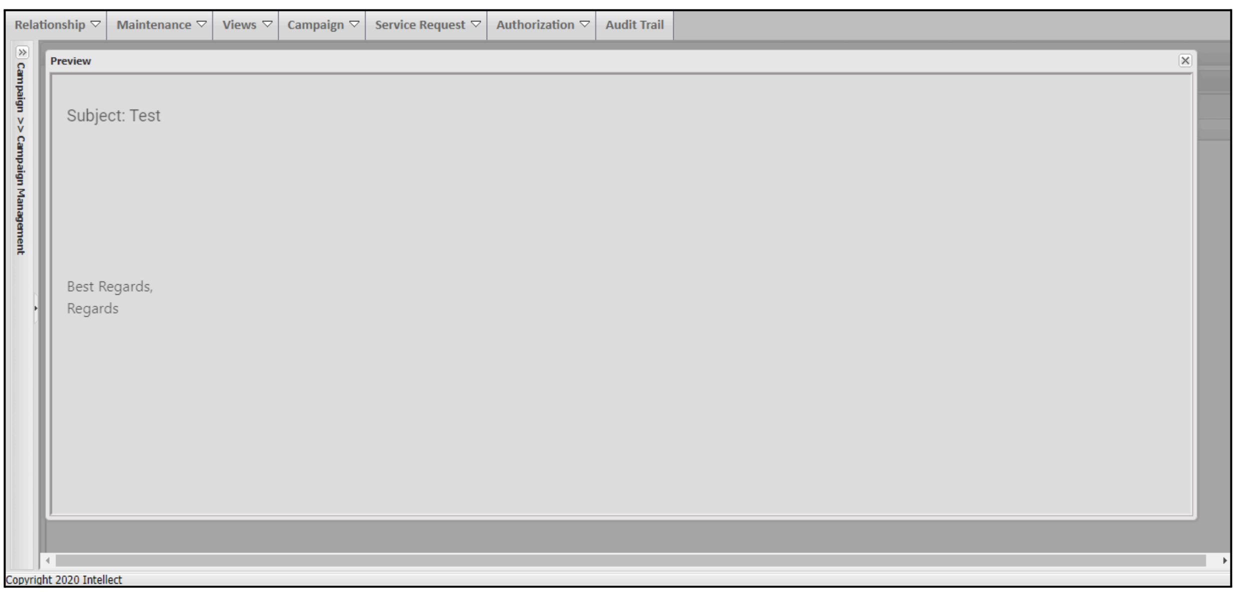
Screen: Capture Campaign Notes

e. **Brochure** - Attach brochures related to the campaign



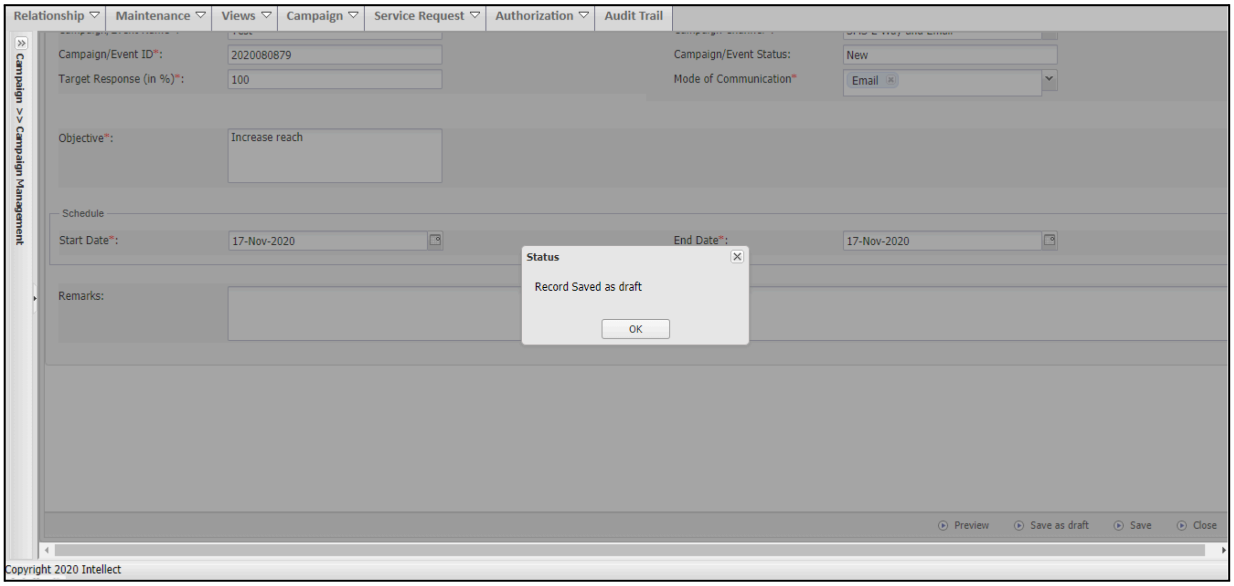
Screen: Attach Brochures

3. After the User has captured all relevant details related to the campaign, they can perform the following actions:
    a. **Preview** - Click on the "Preview" button to view the Email details related to the campaign. At the time of email broadcasting, the system will automatically frame the email as per the Header, Subject, Body Text and Signature as shown below. For SMS broadcasting, SMS Content will be used. Email/SMS are broadcasted to the leads on the campaign start date



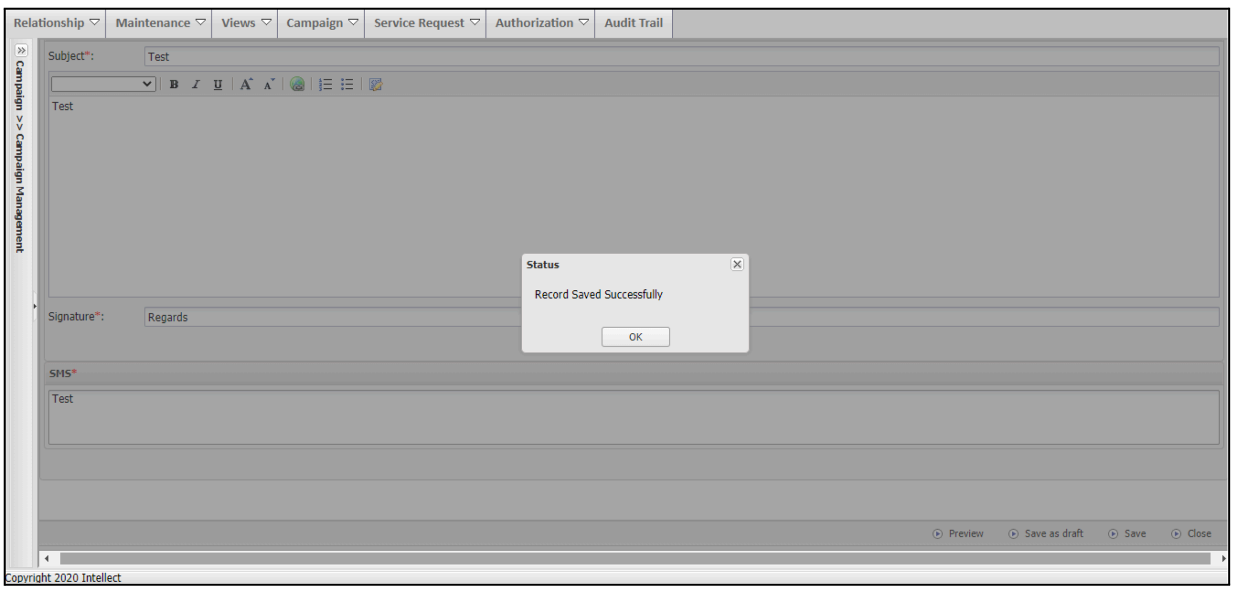
Screen: Preview Email

    b. **Save as Draft** - Click on the "Save as Draft" button to save the campaign in draft mode. The draft can be viewed/modified from the Campaign Management screen



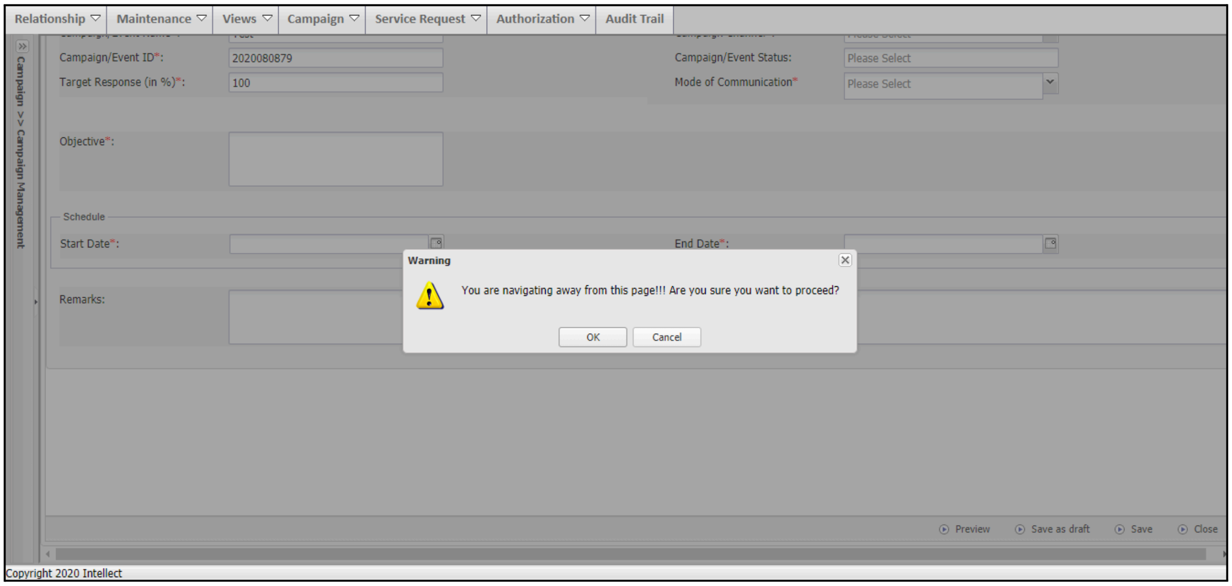
Screen: Save as Draft

c. **Save** - Click on the "Save" button to Save the campaign details. After the campaign has been saved, it goes to the **Supervisor for Approval**



Screen: Save Campaign

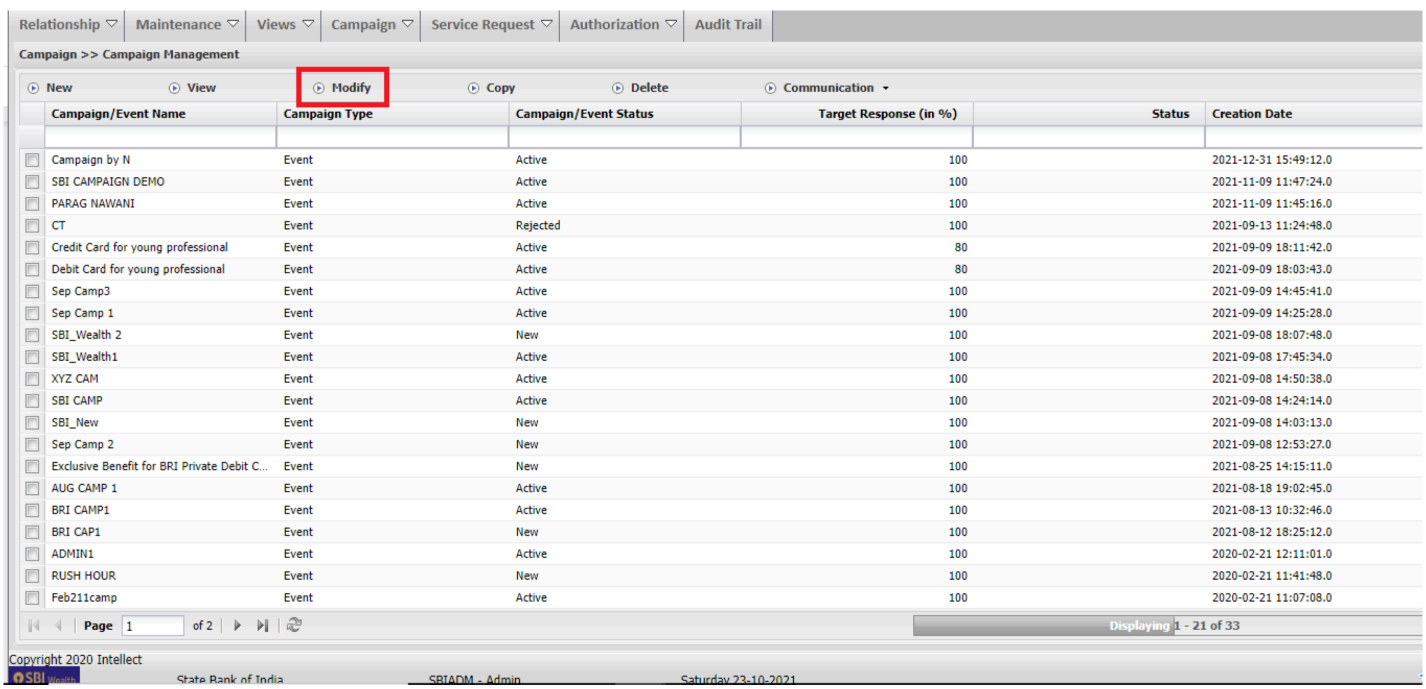
d. **Close** - Click on the "Close" and then "Ok" button on the subsequent overlay to navigate back to the campaign management screen



Screen: Close Campaign

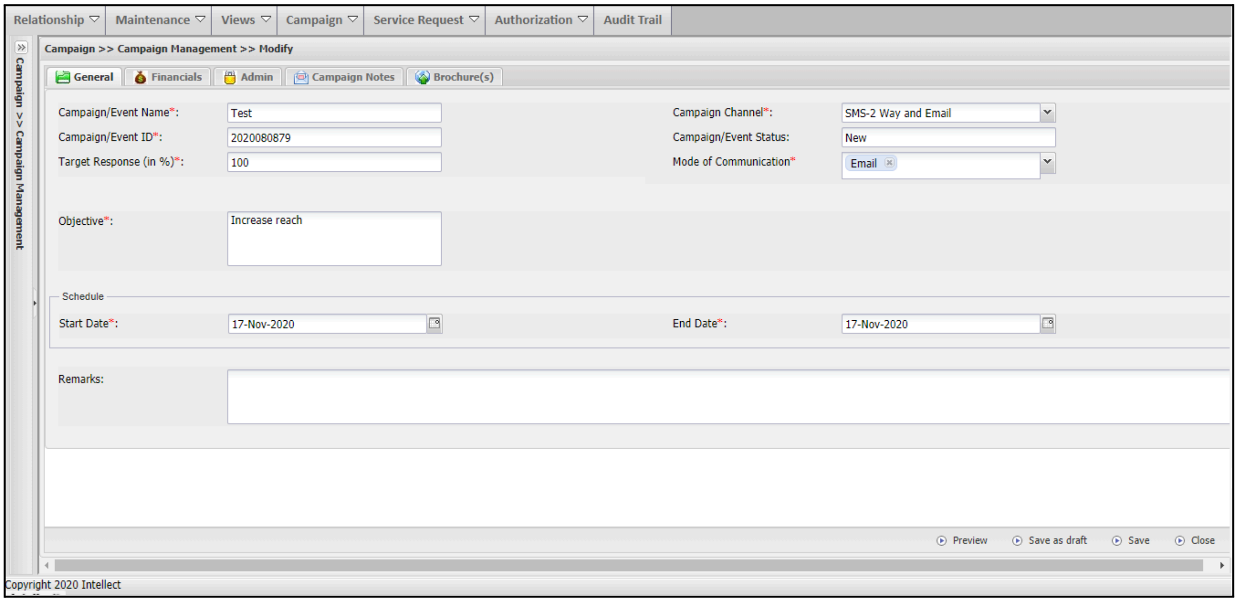
4.3.2 Modify an Existing Campaign

1. On the Campaign Management screen, the User clicks on the “Modify” button after selecting a campaign, to navigate to the Modify Campaign screen, where they can modify a campaign



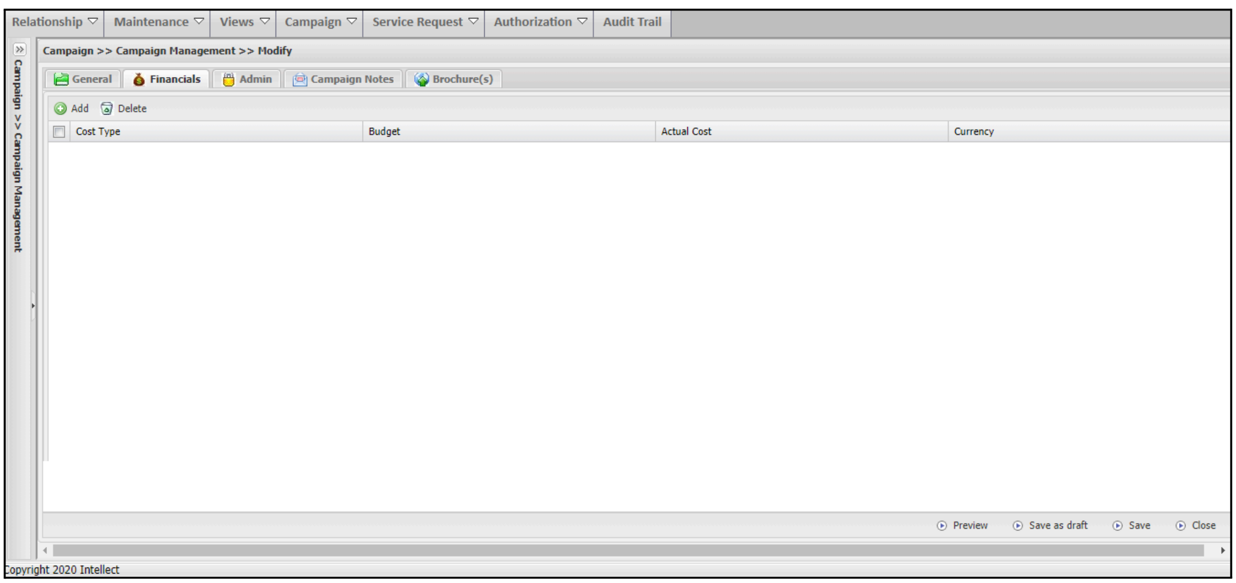
Screen: Modify an Existing Campaign

2. On the Modify Campaign screen, the User can navigate through the following tabs to capture campaign details:
   a. **General** - Modify General information such as Campaign Name, Channel etc.



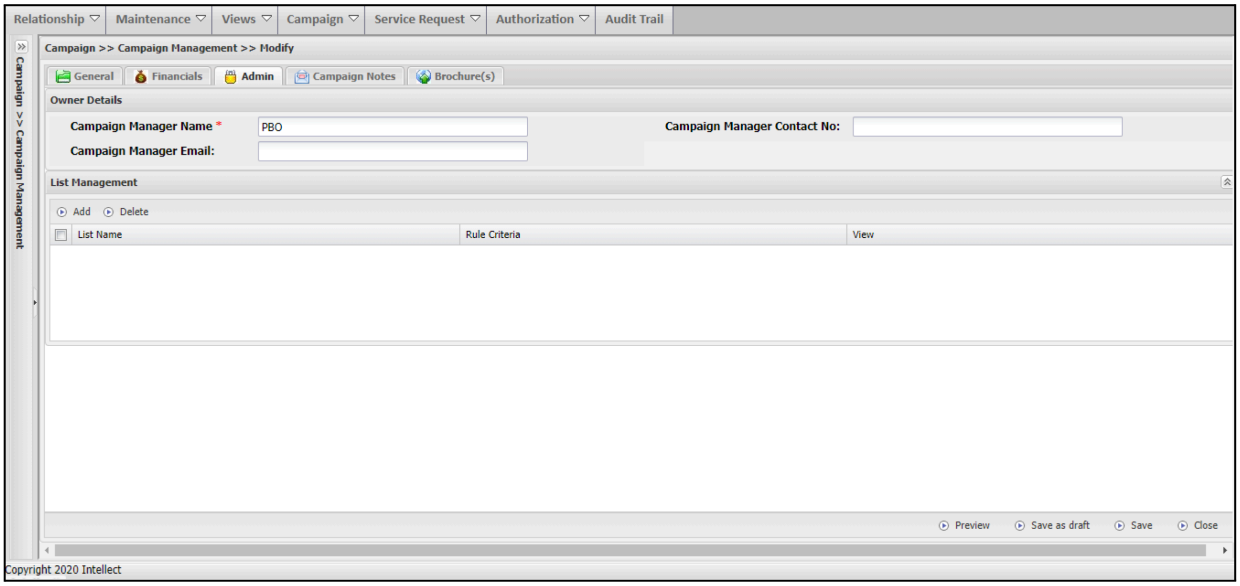
Screen: Modify General Information

b. **Financial** - Modify Financials such as Advertisement and Budget cost



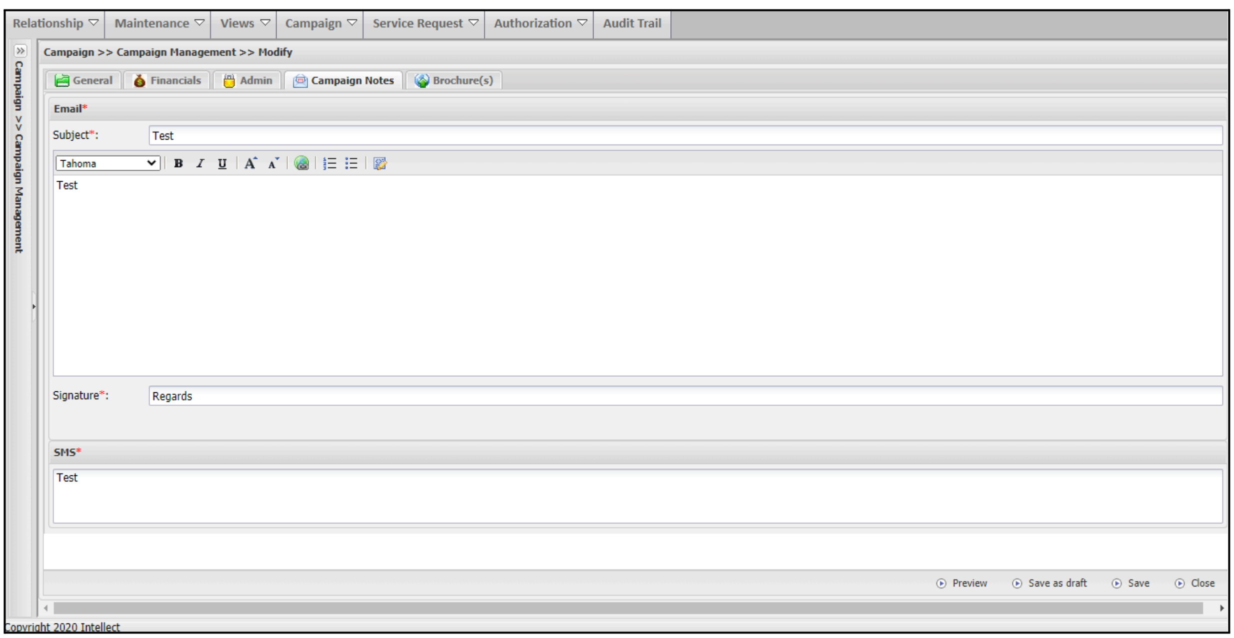
Screen: Modify Financial Information

c. **Admin** - Modify Campaign Manager details, selected target list



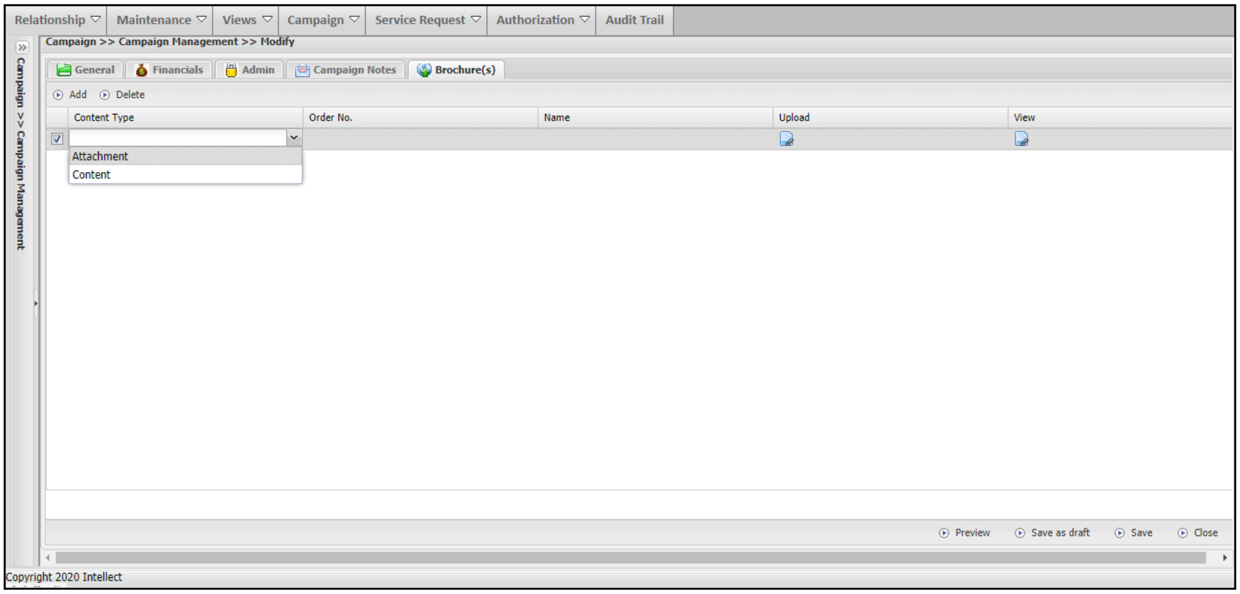
Screen: Modify Admin details

d. **Campaign Notes** - Modify content for the Email and/or SMS that will be sent out as part of the campaign



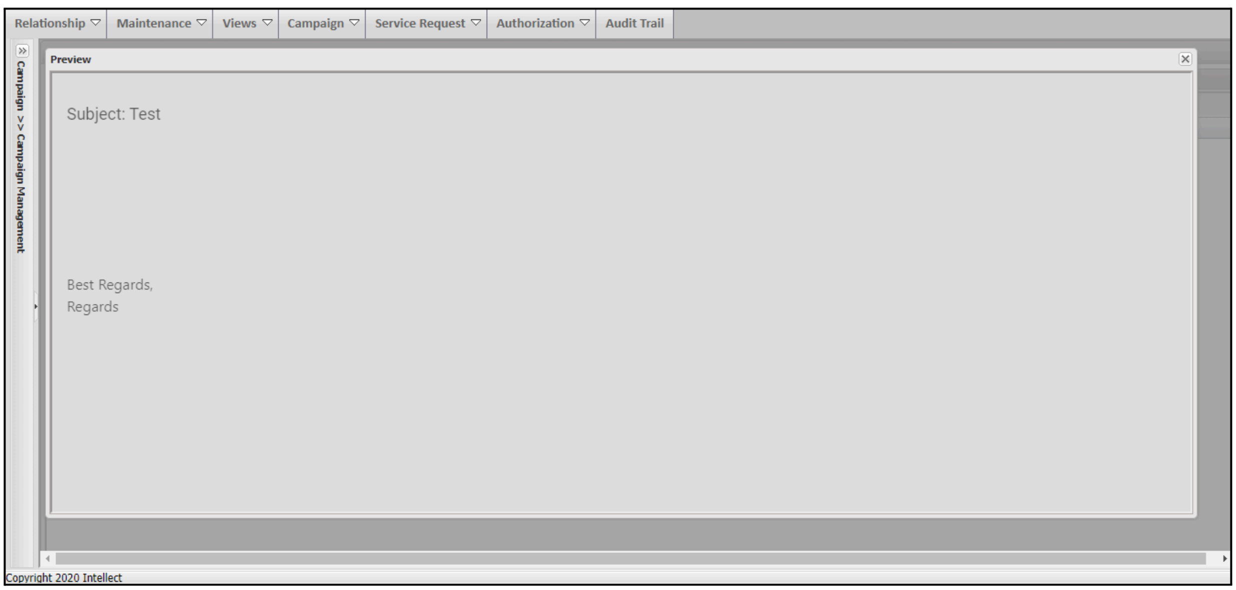
Screen: Modify Campaign Notes

e. **Brochure** - Attach/Remove brochures related to the campaign



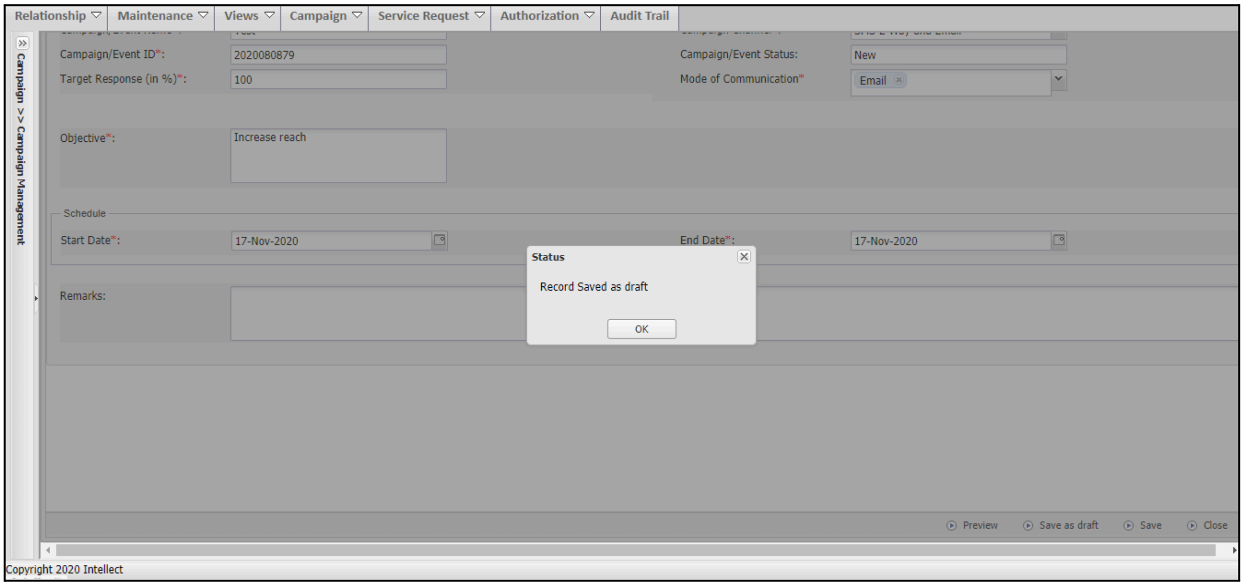
Screen: Attach/Remove Brochures

3. After the User has modified all relevant details related to the campaign, they can perform the following actions:
   a. **Preview** - Click on the "Preview" button to view the Email details related to the campaign



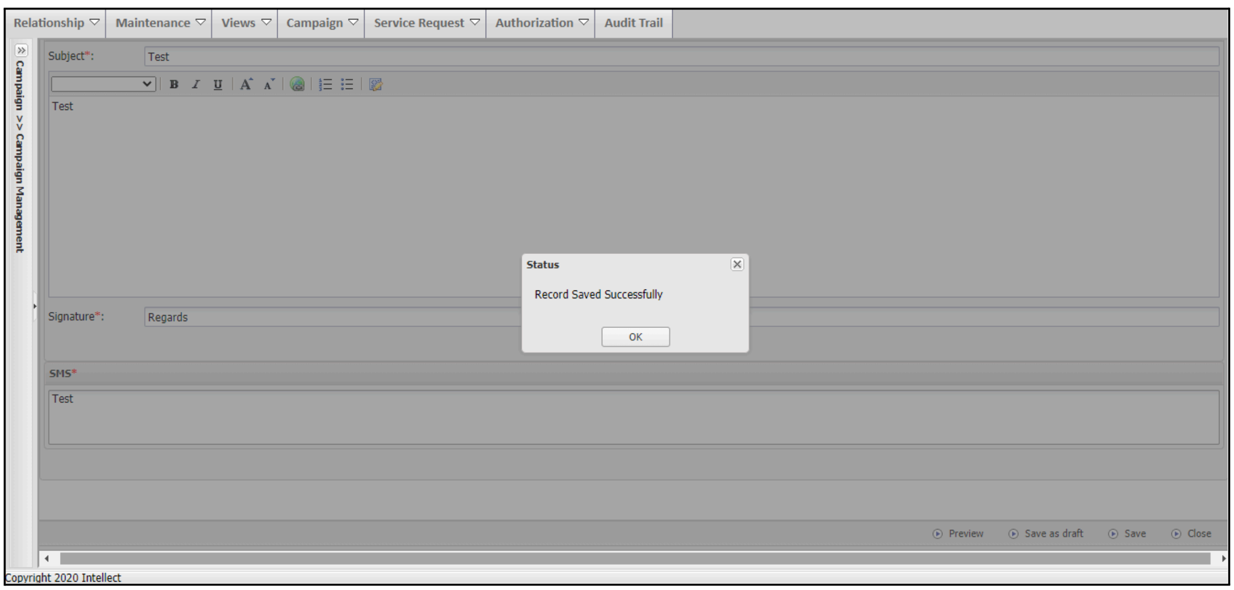
Screen: Preview Email

   b. **Save as Draft** - Click on the "Save as Draft" button to save the campaign in draft mode. The draft can be viewed/modified from the Campaign Management screen



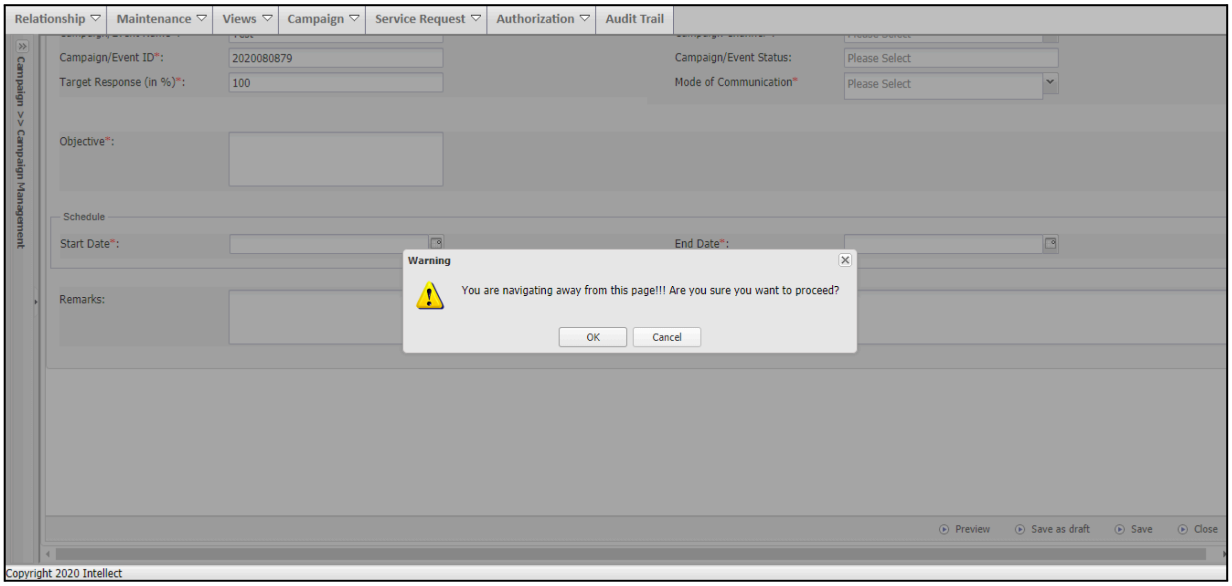
Screen: Save as Draft

c. **Save** - Click on the "Save" button to Save the campaign details. After the campaign has been saved, it goes to the **Supervisor for Approval**



Screen: Save Campaign

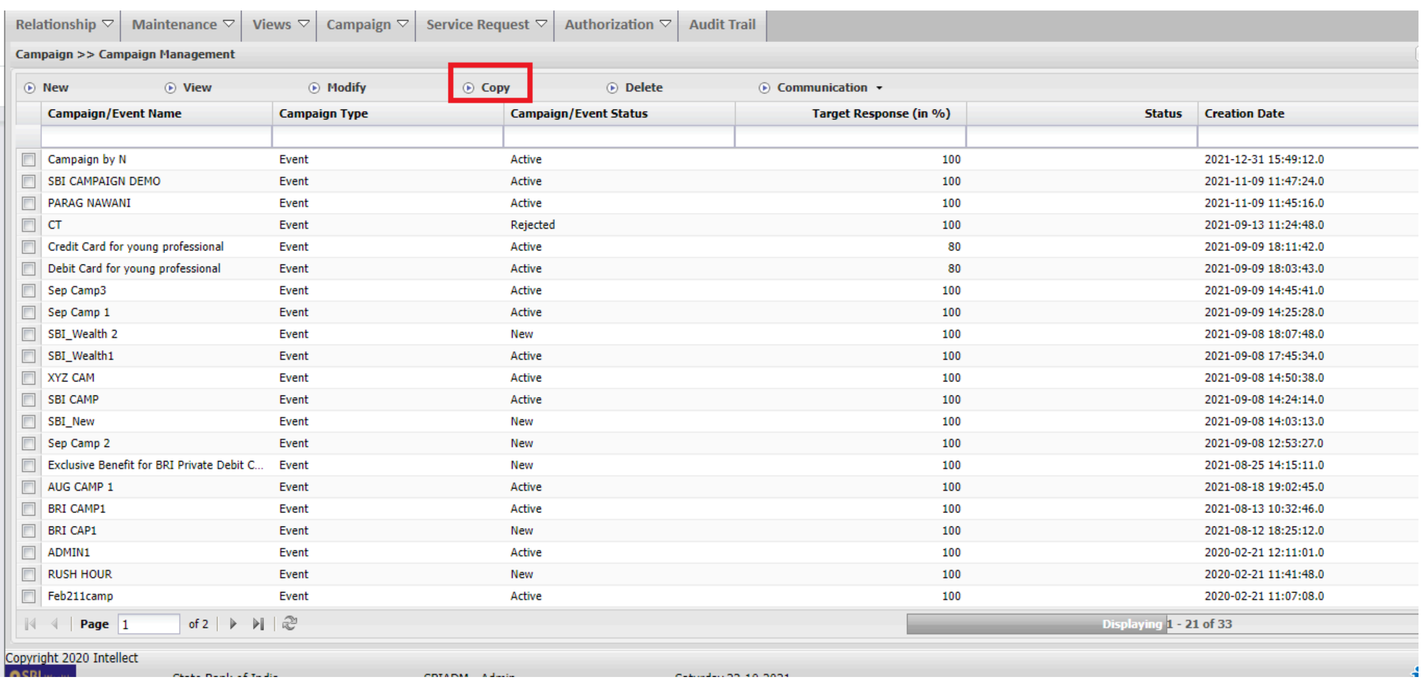
d. **Close** - Click on the "Close" and then "Ok" button on the subsequent overlay to navigate back to the Campaign Management screen



Screen: Close Campaign

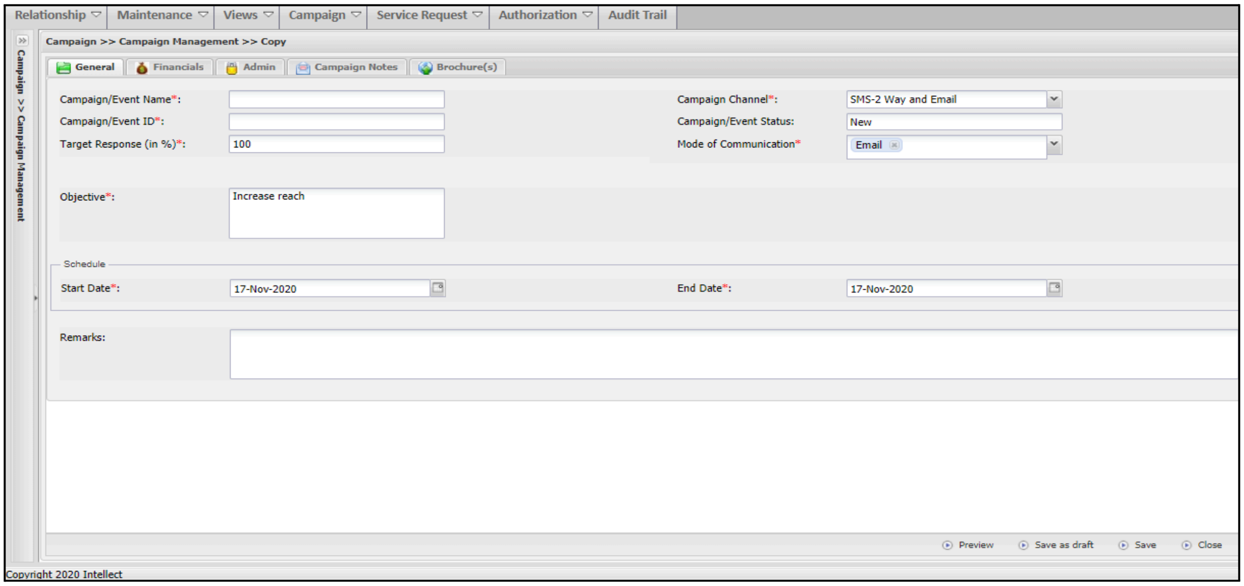
4.3.3 Copy a Campaign

1. On the Campaign Management screen, the User clicks on the "Copy" button after selecting a campaign, to navigate to the Copy Campaign screen, where they can copy the details of existing campaigns to create a new campaign



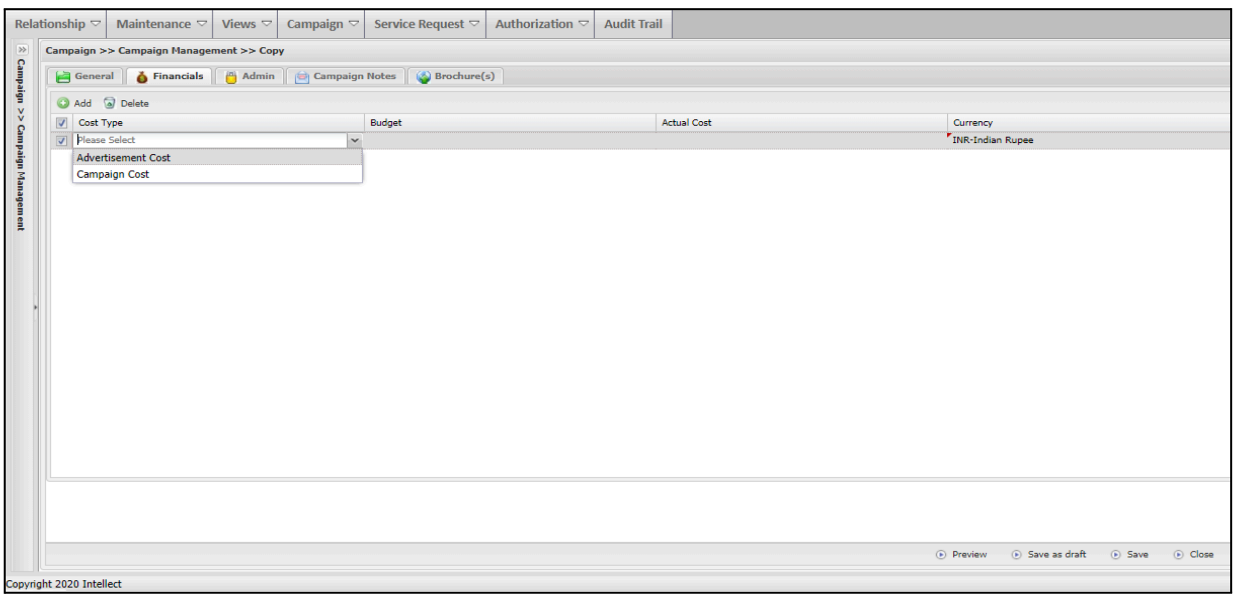
Screen: Copy an Existing Campaign

2. On the Copy Campaign screen, the User can navigate through the following tabs to capture campaign details:
    a. **General** - Copy/Modify General Information such as Campaign Name, Channel etc.



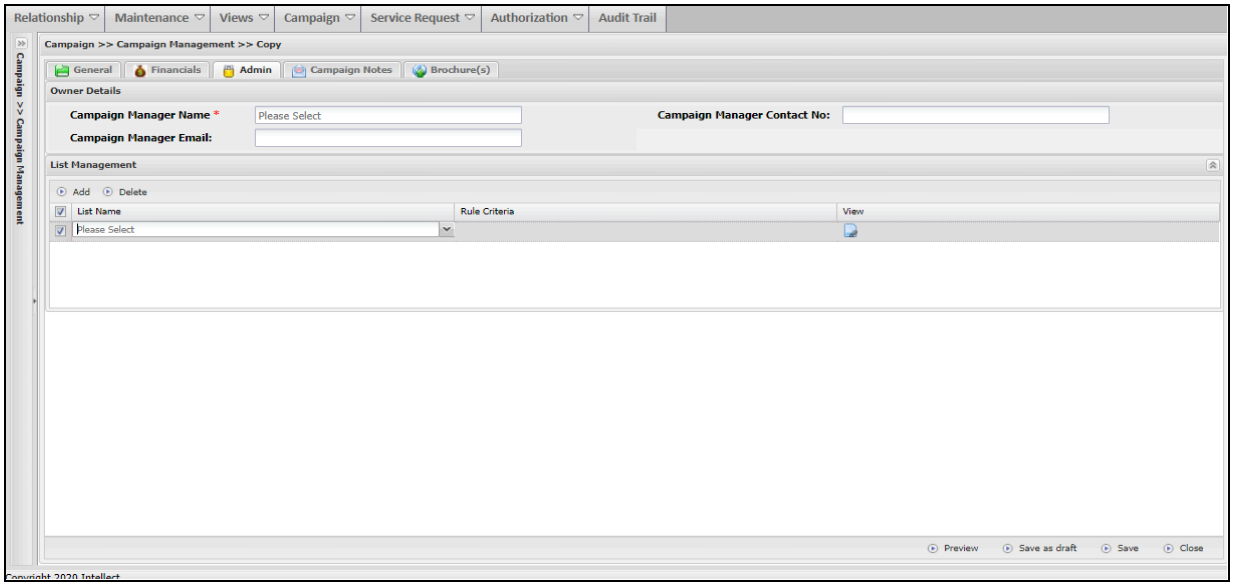
Screen: General Information

b. **Financial** - Copy/ Modify Financials such as Advertisement and Budget cost



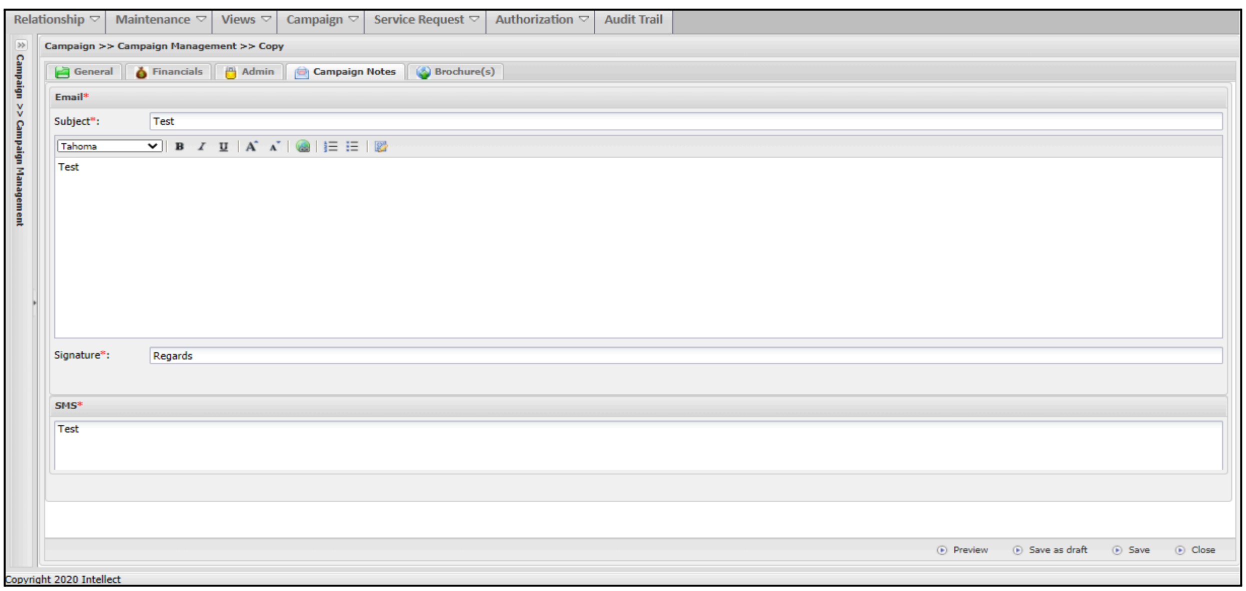
Screen: Financial Information

c. **Admin** - Copy/Modify Campaign Manager details, selected target List



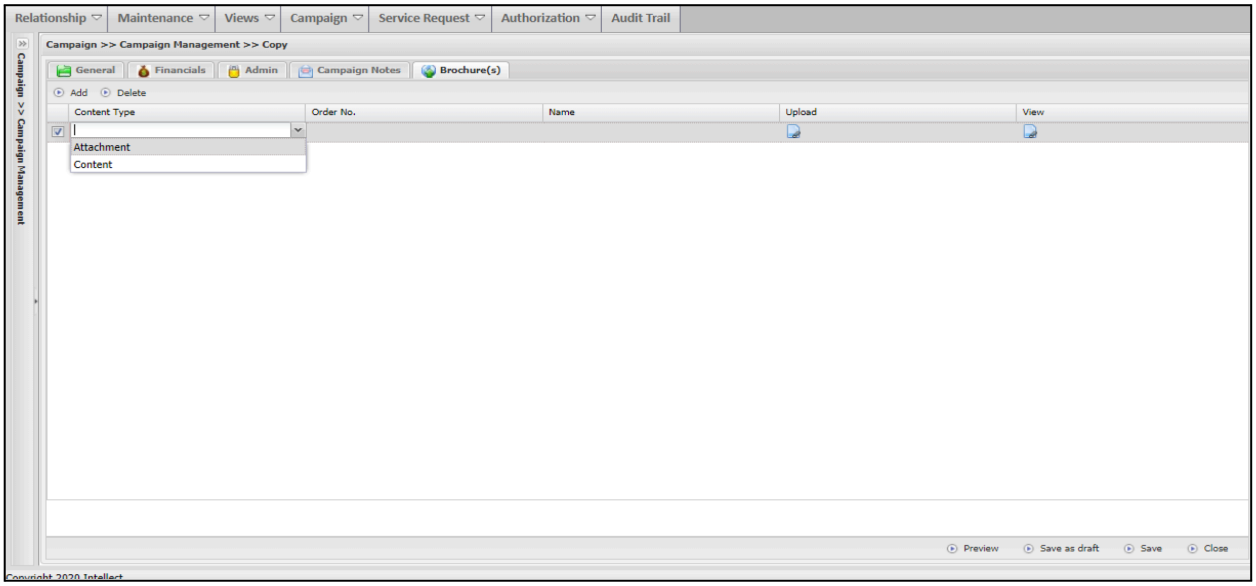
Screen: Admin details

d. **Campaign Notes** - Copy/Modify content for the Email and/or SMS that will be sent out as part of the campaign



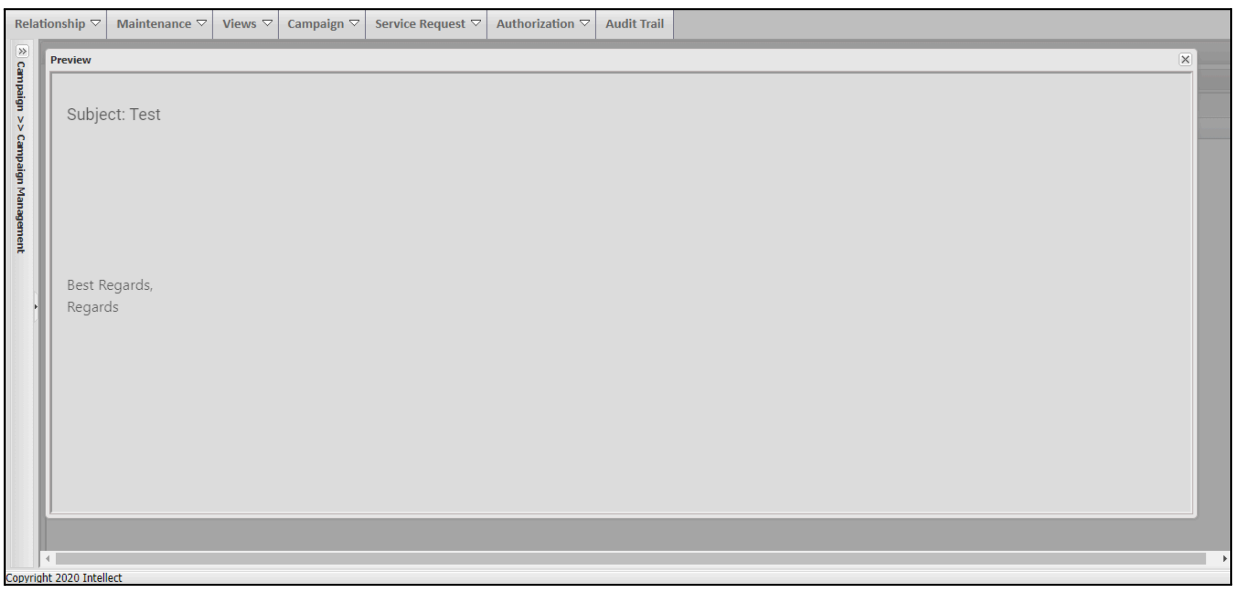
Screen: Campaign Notes

e. **Brochure** - Attach/Remove brochures related to the campaign



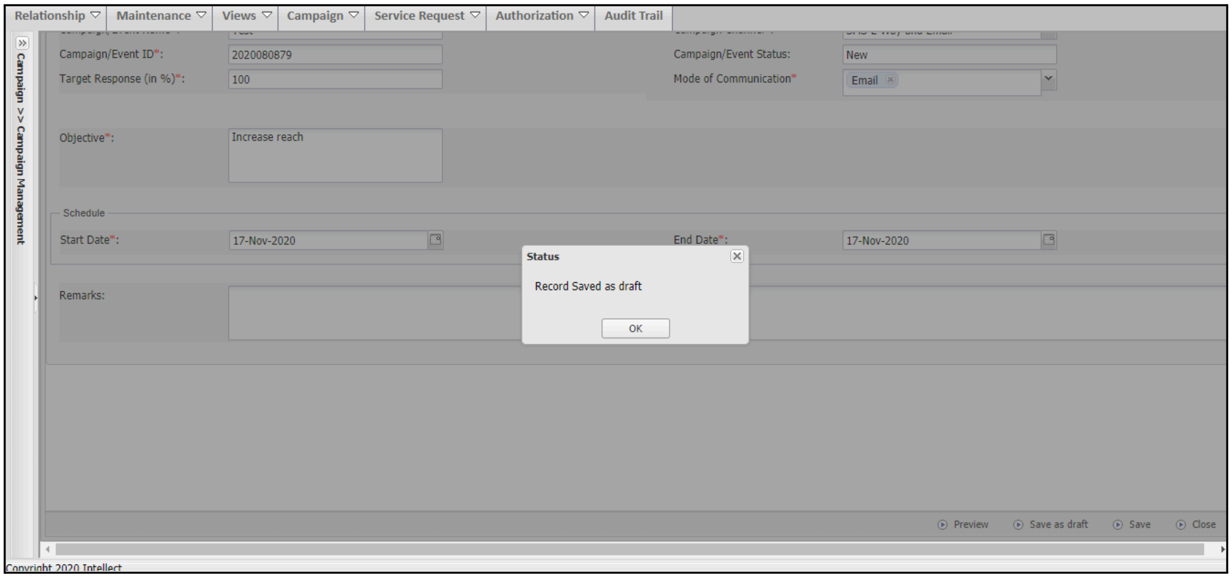
Screen: Attach/Remove Brochures

3. After the User has copied/modified all relevant details related to the campaign, they can perform the following actions:
   a. **Preview** - Click on the "Preview" button to view the Email details related to the campaign



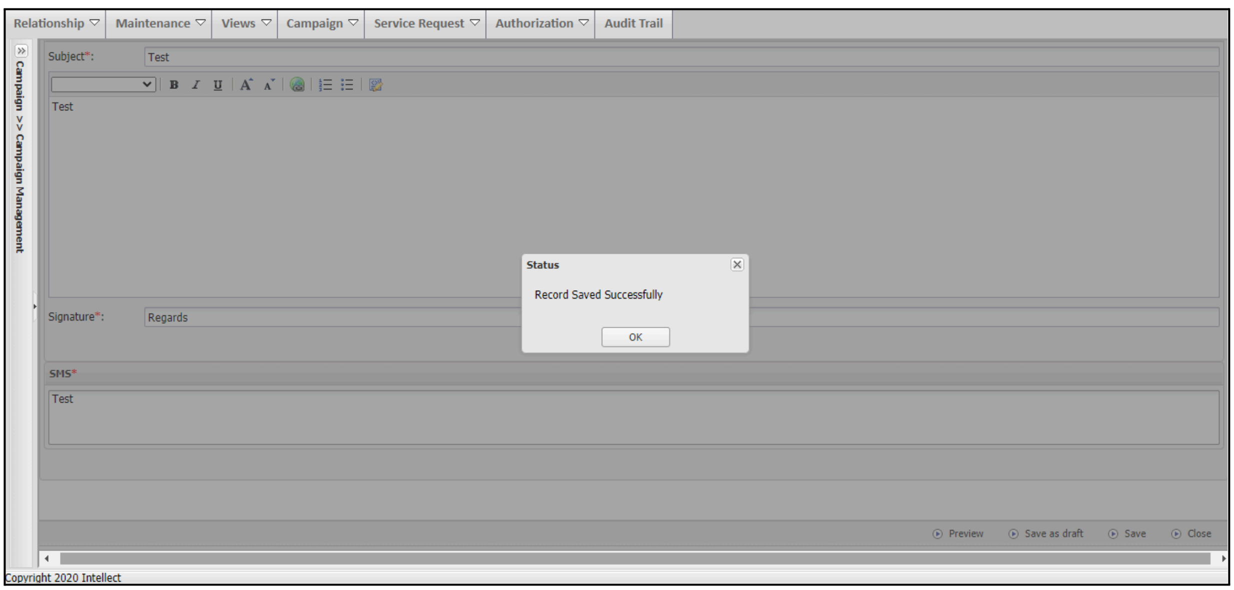
Screen: Preview Email

   b. **Save as Draft** - Click on the "Save as Draft" button to save the campaign in draft mode. The draft can be viewed/modified from the Campaign Management screen



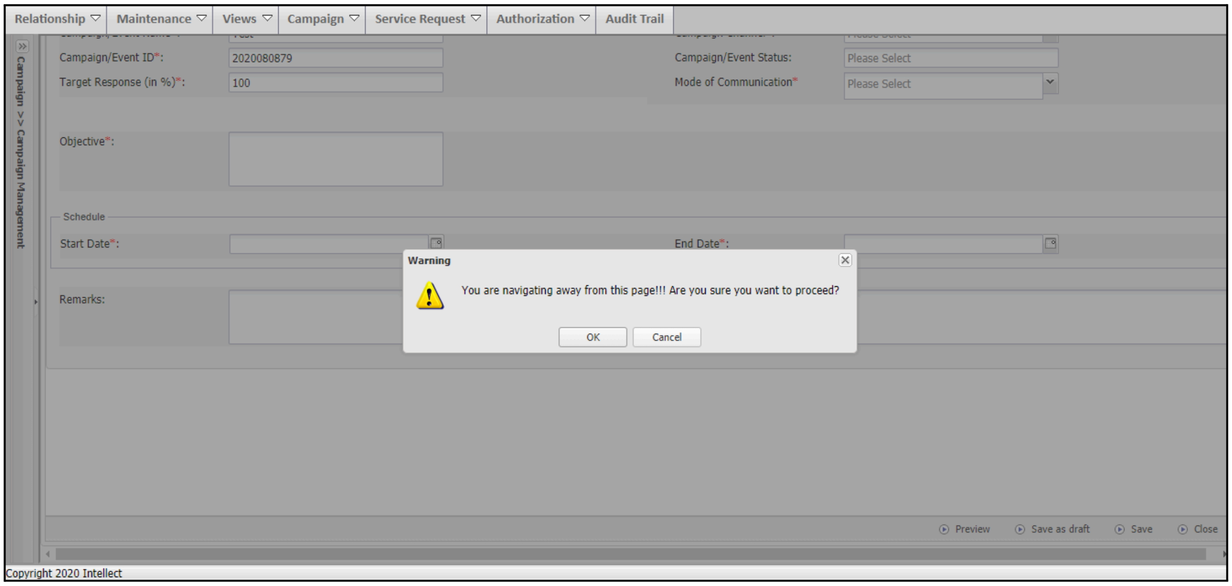
Screen: Save as Draft

c. **Save** - Click on the "Save" button to Save the campaign details. After the campaign has been saved, it goes to the **Supervisor for Approval**



Screen: Save Campaign

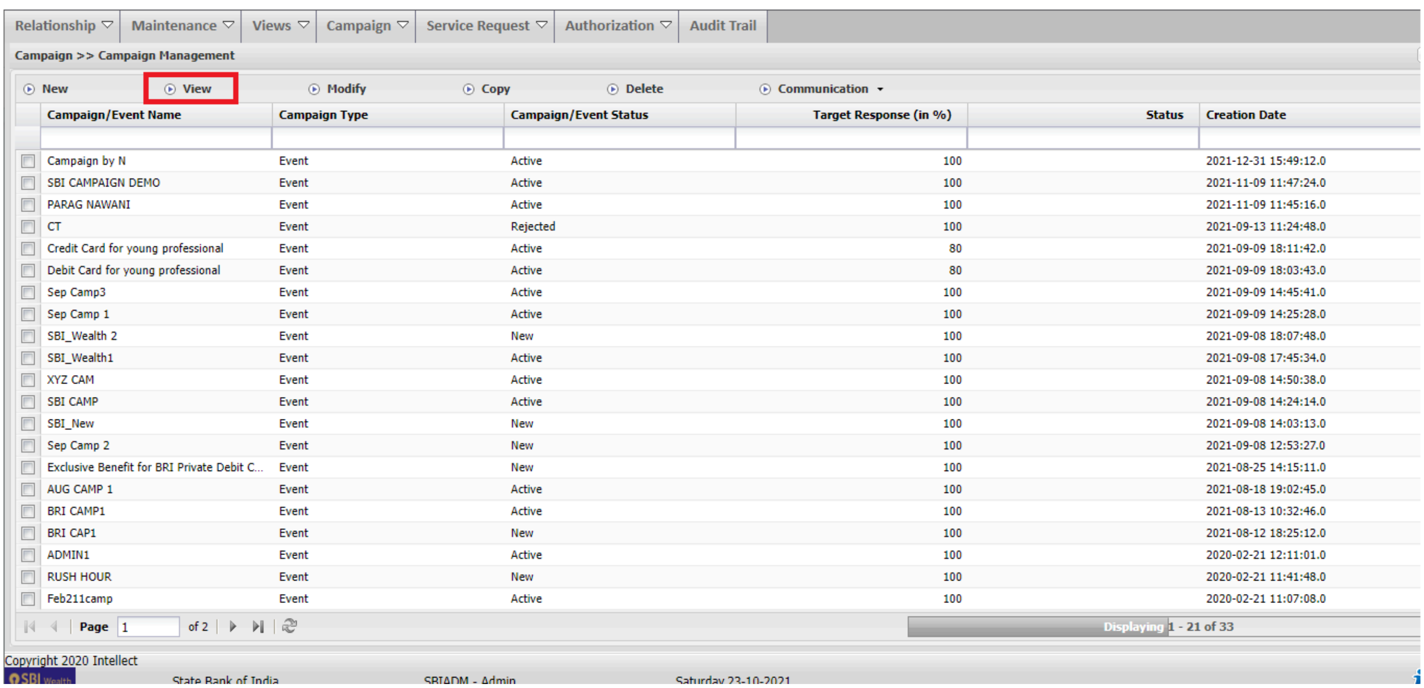
d. **Close** - Click on the "Close" and then "Ok" button on the subsequent overlay to navigate back to the Campaign Management screen



Screen: Close Campaign

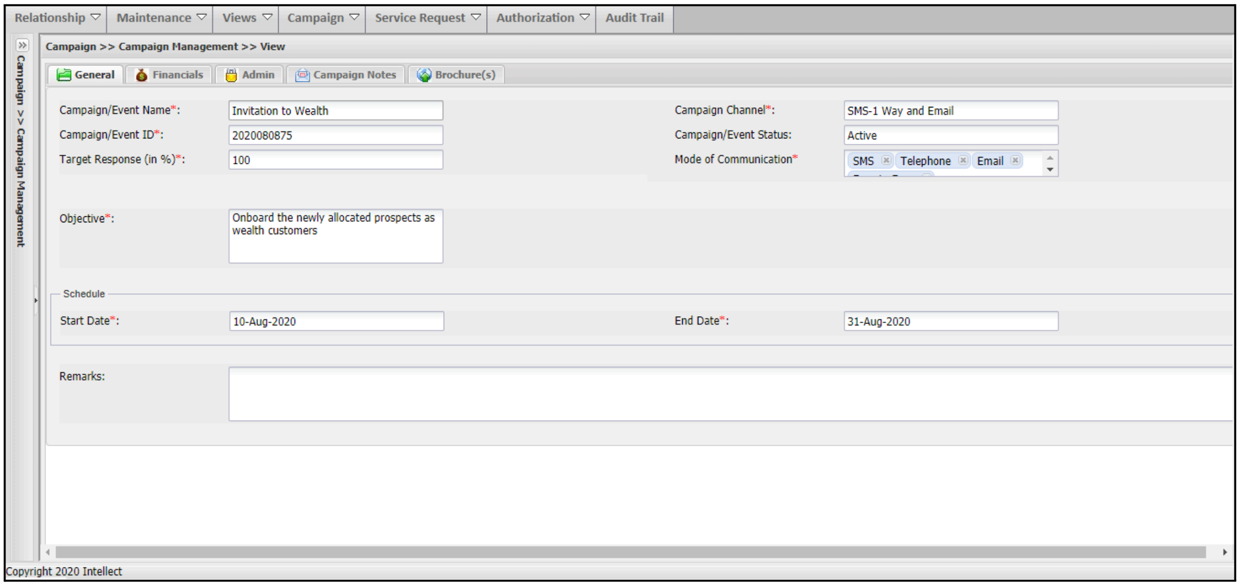
4.3.4 View a Campaign

1. On the Campaign Management screen, the User clicks on the "View" button after selecting a campaign, to navigate to the View Campaign screen, where they can view campaign details



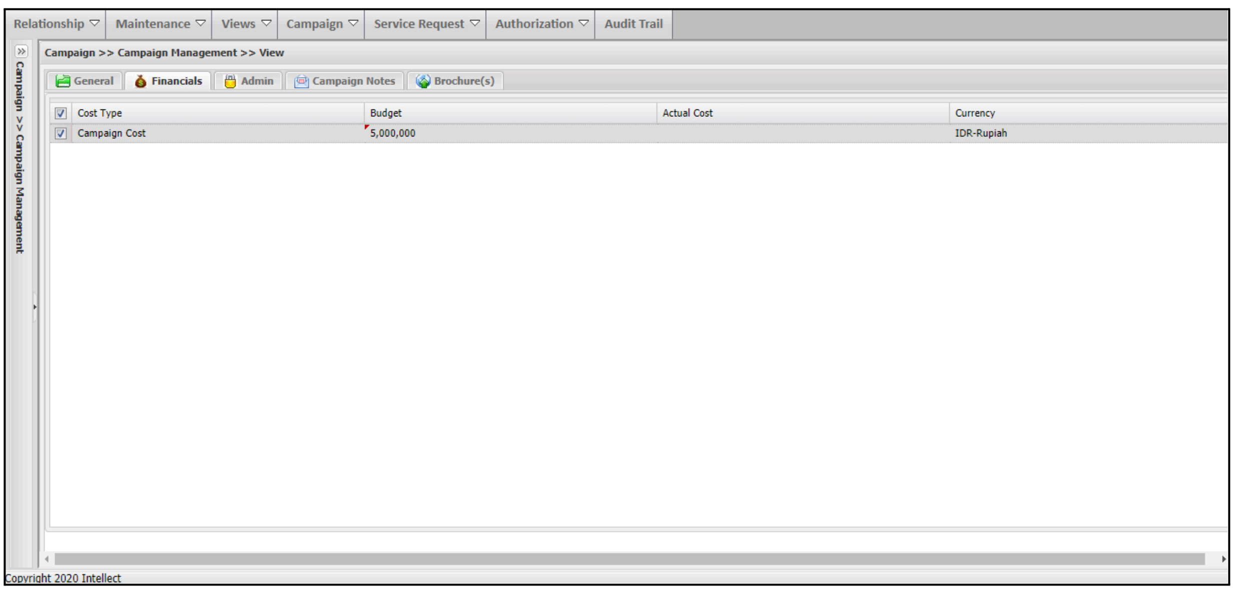
Screen: View Campaign

2. On the View Campaign screen, the User can navigate through the following tabs to view campaign details:
   a. **General** - View General Information such as Campaign Name, Channel etc.



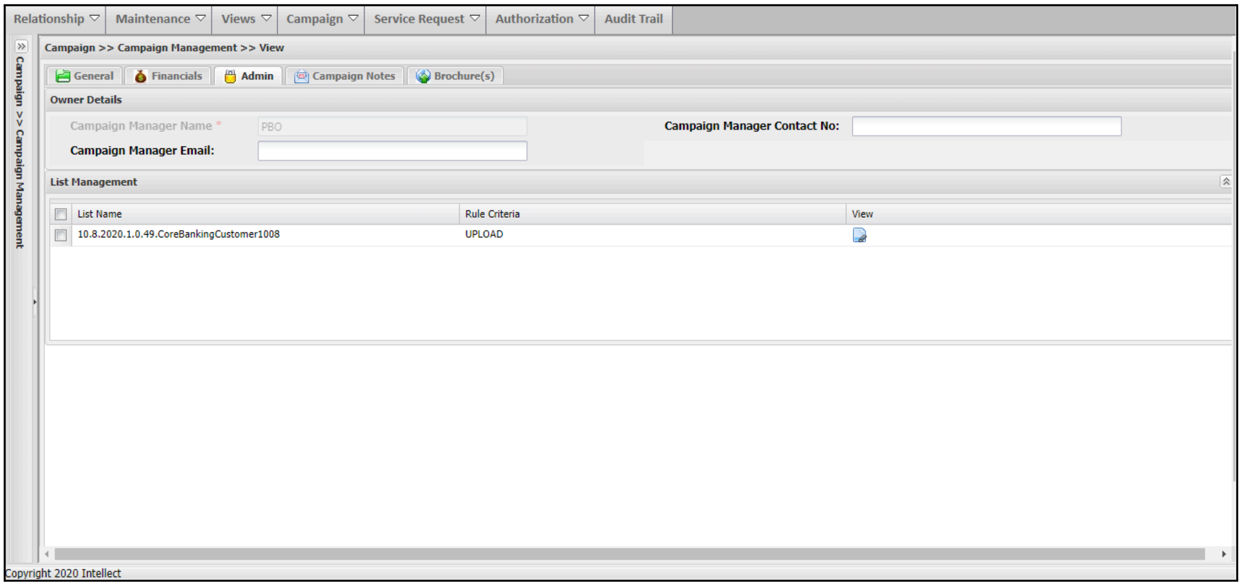
Screen: General Information

b. **Financial** - View Financials such as Advertisement and Budget cost



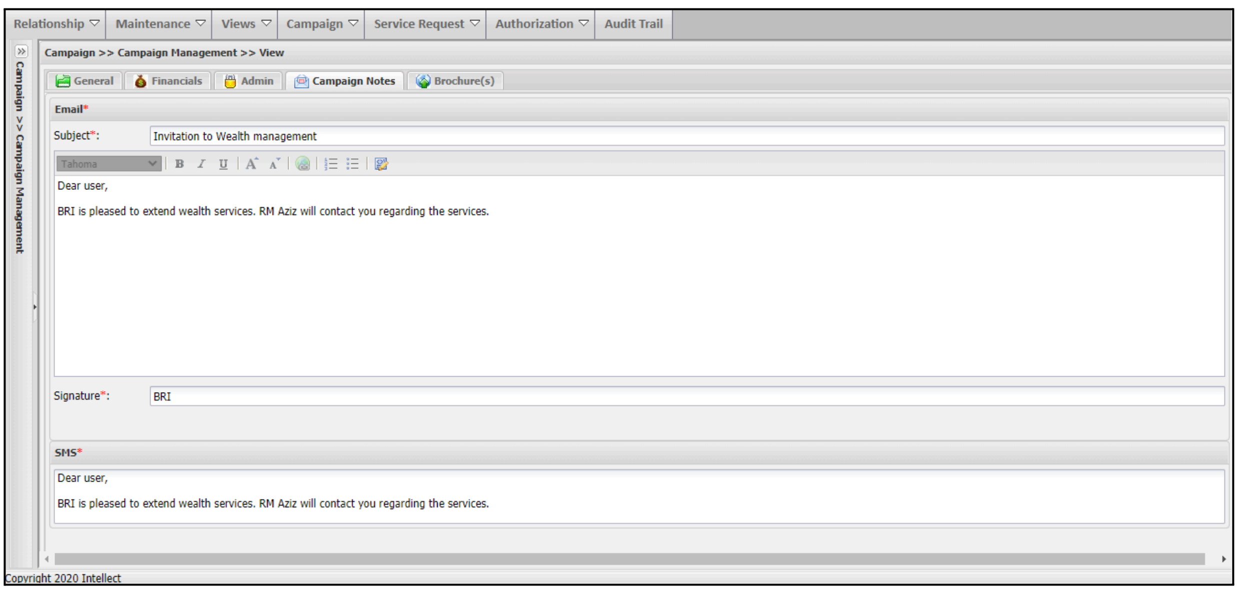
Screen: Financial Information

c. **Admin** - View Campaign Manager details, selected target List



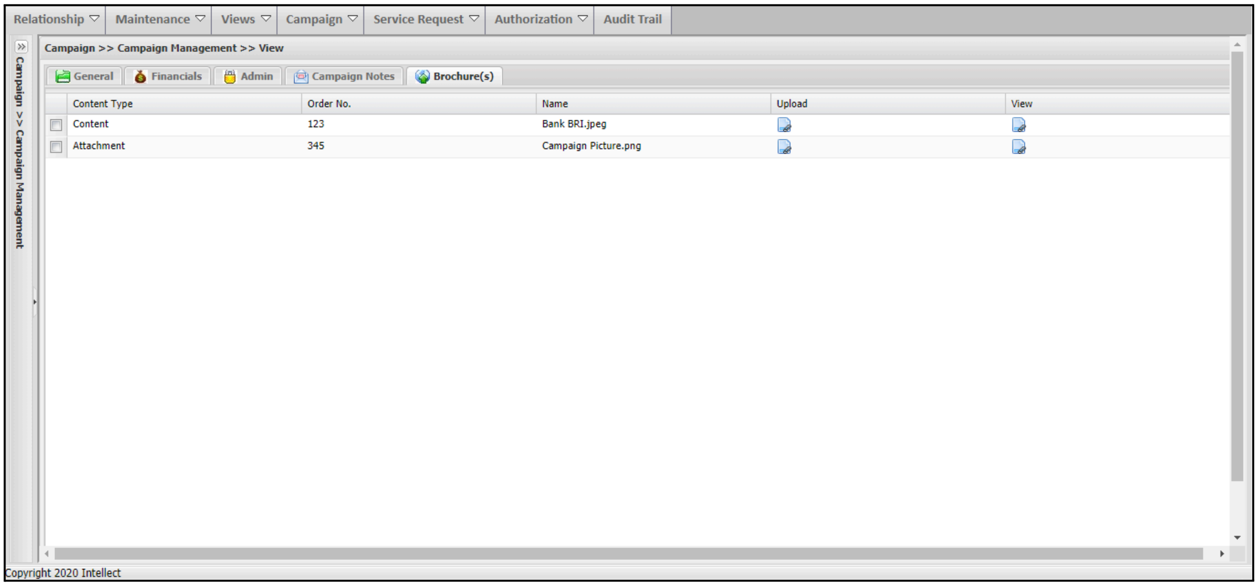
Screen: Admin details

d. **Campaign Notes** - View the Email and/or SMS content that will be sent out as part of the campaign



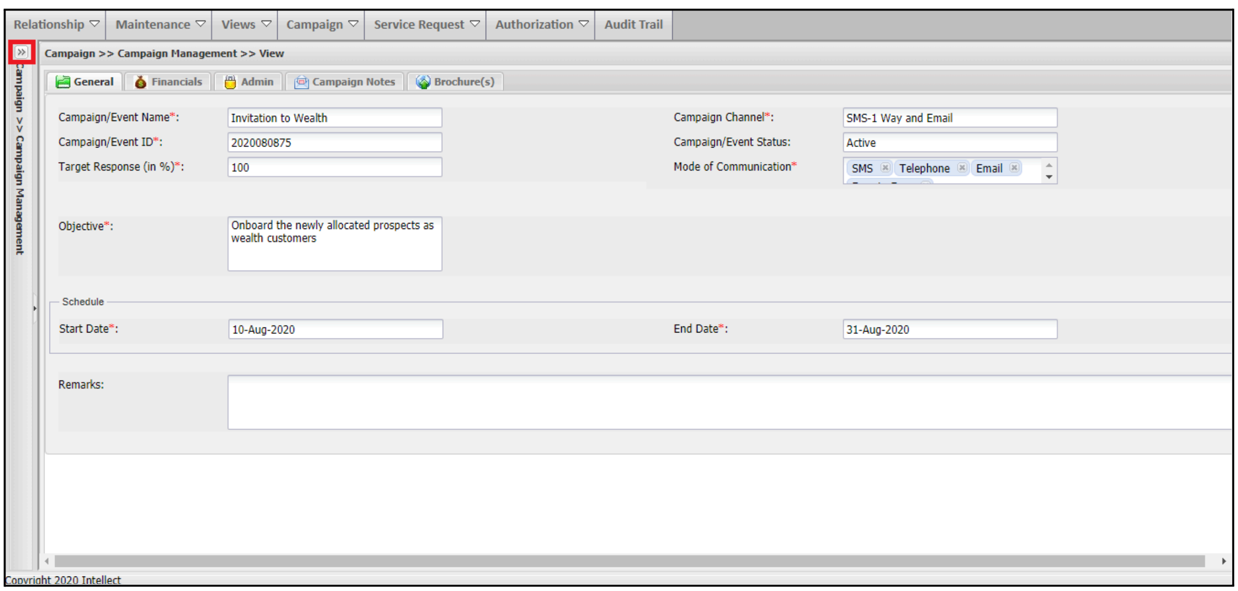
Screen: Campaign Notes

e. **Brochure** - View brochures related to the campaign

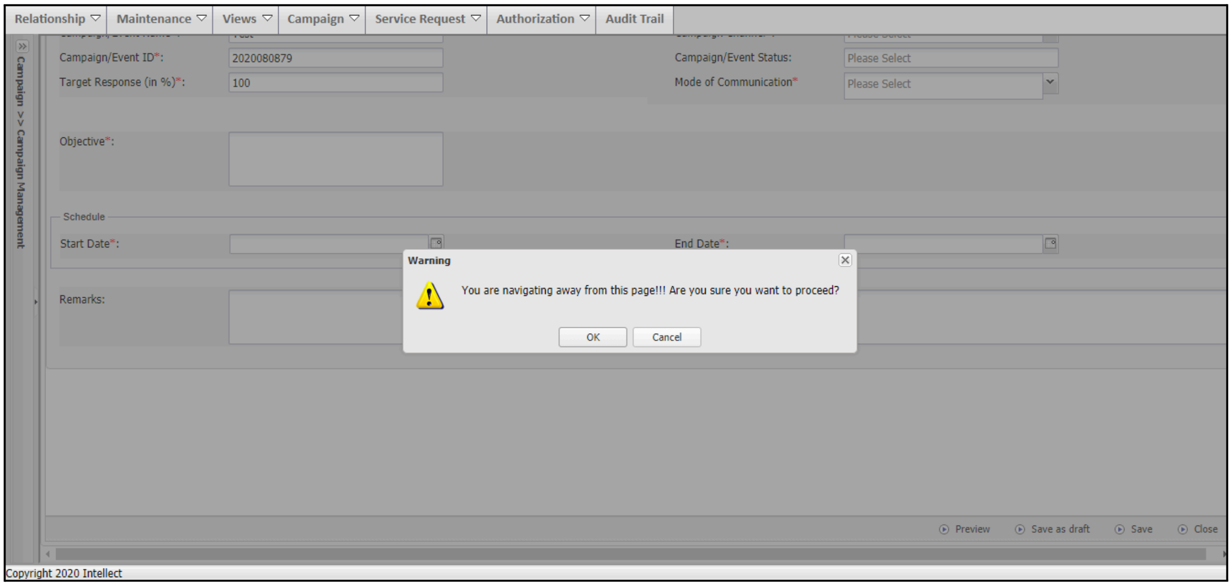


Screen: Attach/Remove Brochures

3. After the User has viewed all relevant details in the campaign, they can click on the "Double Arrow" button on the top left corner of the screen, and subsequently on the "Ok" button to navigate back to the Campaign Management screen



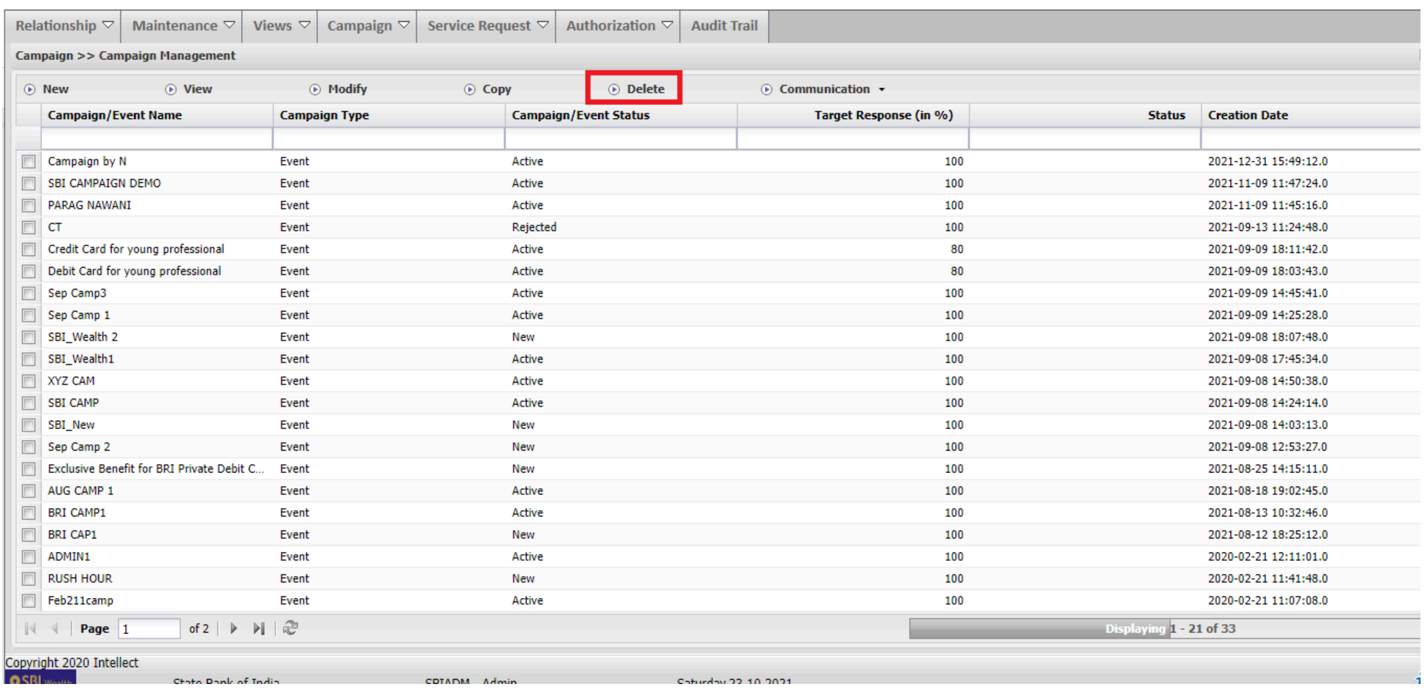
Screen: Close Campaign



Screen: Close Campaign

4.3.5 Delete a Campaign

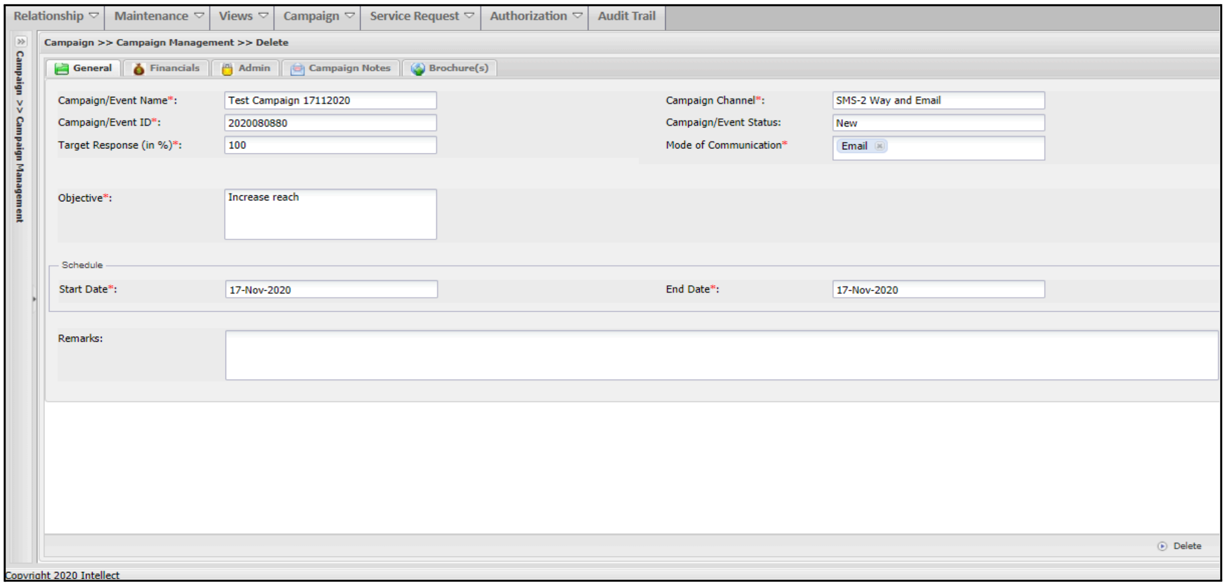
1. On the Campaign Management screen, the User clicks on the "Delete" button after selecting a campaign, to navigate to the Delete Campaign screen, where they can delete the unauthorized campaign



Campaign/Event Name	Campaign Type	Campaign/Event Status	Target Response (in %)	Status	Creation Date
Campaign by N	Event	Active	100		2021-12-31 15:49:12.0
SBI CAMPAIGN DEMO	Event	Active	100		2021-11-09 11:47:24.0
PARAG NAWANI	Event	Active	100		2021-11-09 11:45:16.0
CT	Event	Rejected	100		2021-09-13 11:24:48.0
Credit Card for young professional	Event	Active	80		2021-09-09 18:11:42.0
Debit Card for young professional	Event	Active	80		2021-09-09 18:03:43.0
Sep Camp3	Event	Active	100		2021-09-09 14:45:41.0
Sep Camp 1	Event	Active	100		2021-09-09 14:25:28.0
SBI_Wealth 2	Event	New	100		2021-09-08 18:07:48.0
SBI_Wealth1	Event	Active	100		2021-09-08 17:45:34.0
XYZ CAM	Event	Active	100		2021-09-08 14:50:38.0
SBI CAMP	Event	Active	100		2021-09-08 14:24:14.0
SBI_New	Event	New	100		2021-09-08 14:03:13.0
Sep Camp 2	Event	New	100		2021-09-08 12:53:27.0
Exclusive Benefit for BRI Private Debit C...	Event	New	100		2021-08-25 14:15:11.0
AUG CAMP 1	Event	Active	100		2021-08-18 19:02:45.0
BRI CAMP1	Event	Active	100		2021-08-13 10:32:46.0
BRI CAP1	Event	New	100		2021-08-12 18:25:12.0
ADMIN1	Event	Active	100		2020-02-21 12:11:01.0
RUSH HOUR	Event	New	100		2020-02-21 11:41:48.0
Feb211camp	Event	Active	100		2020-02-21 11:07:08.0

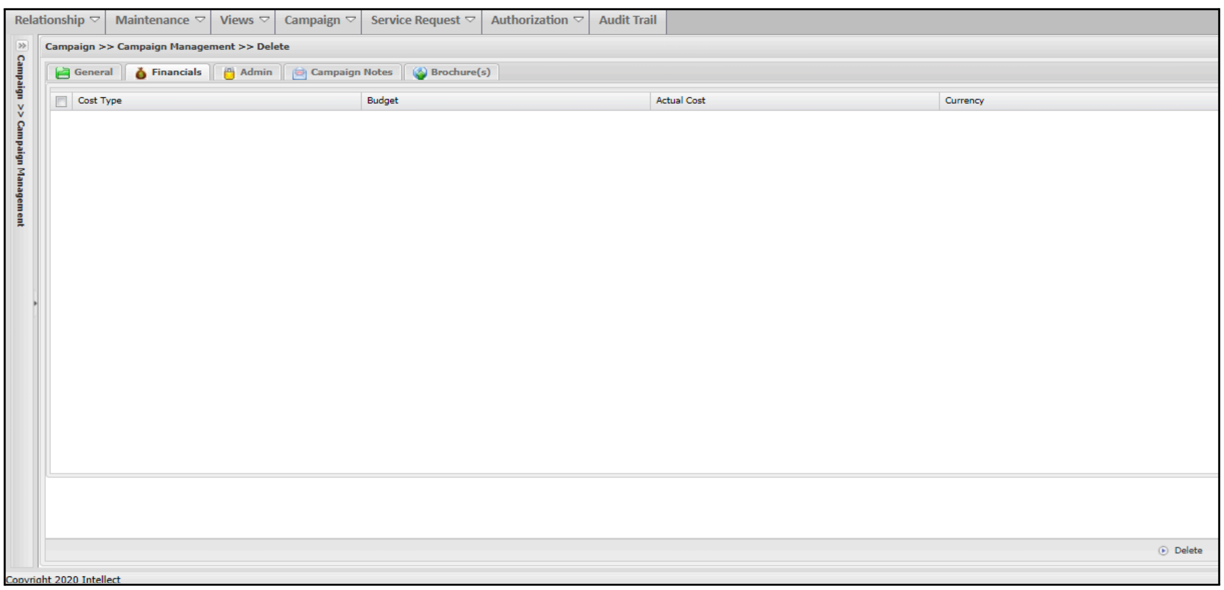
Screen: Delete Campaign

2. On the Delete Campaign screen, the User can navigate through the following tabs to view campaign details:
    a. **General** - View General Information such as Campaign Name, Channel etc.



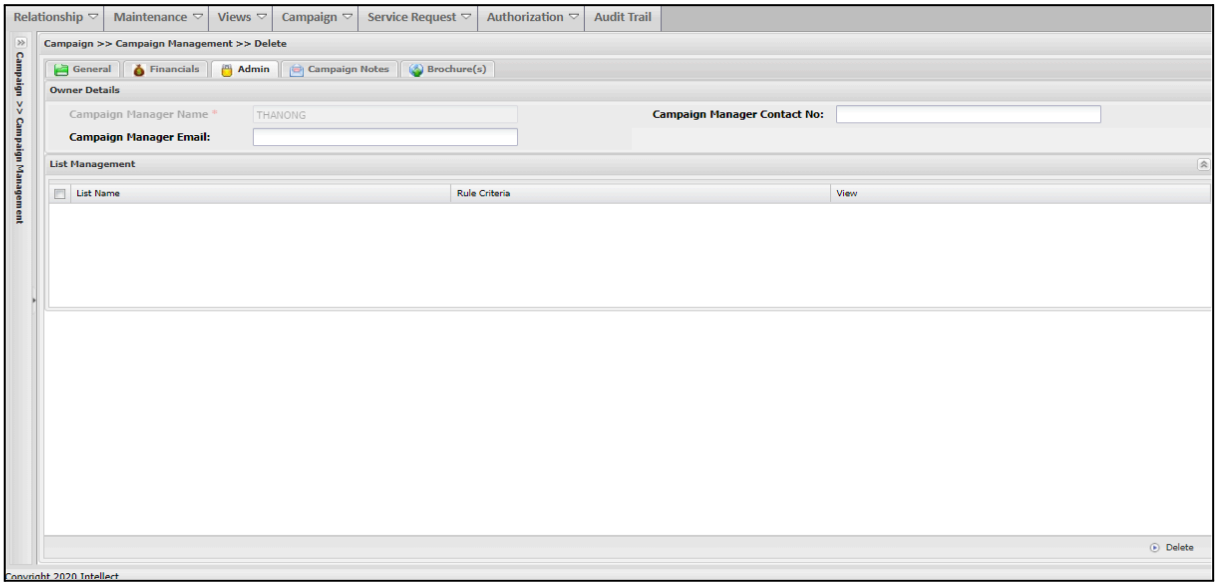
Screen: General Information

b. **Financial** - View Financials such as Advertisement and Budget cost



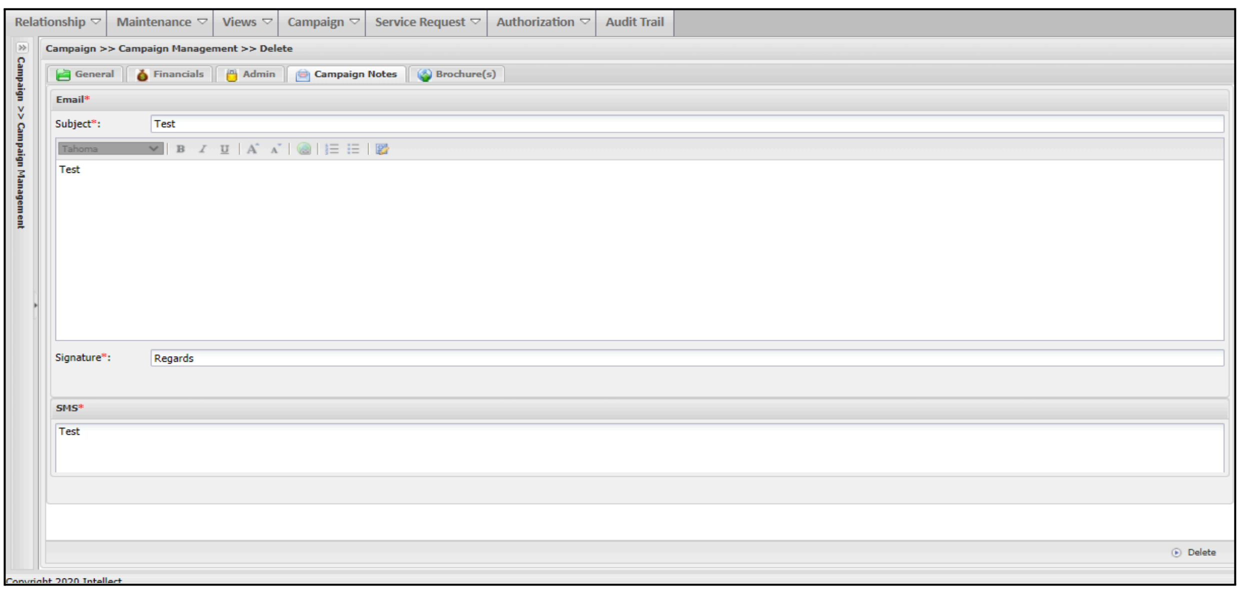
Screen: Financial Information

c. **Admin** - View Campaign Manager details, selected target List



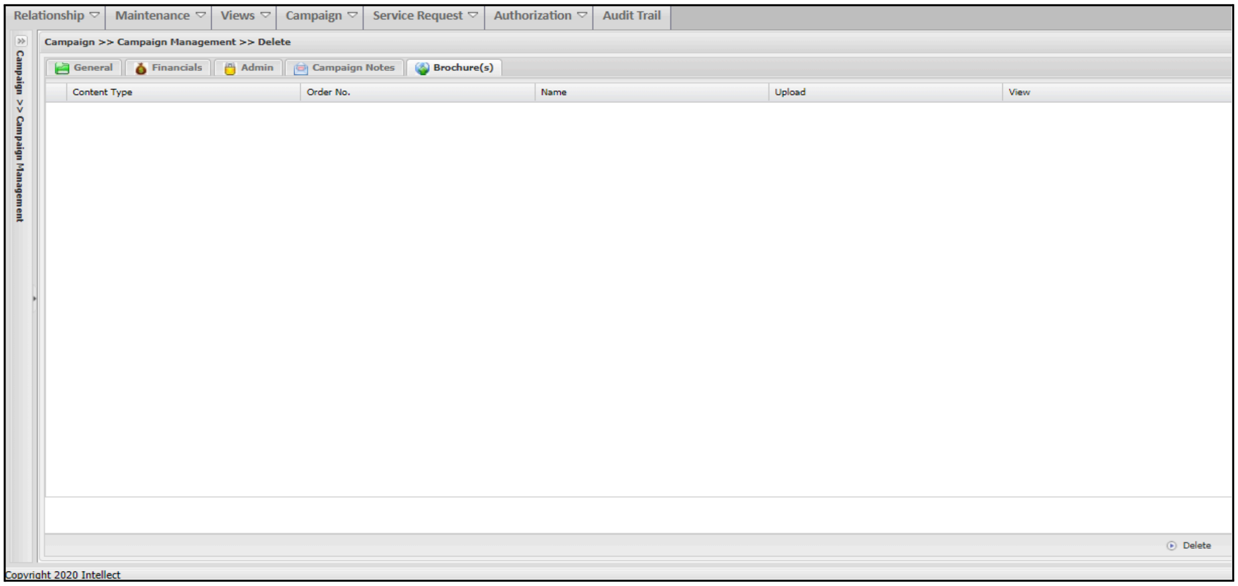
Screen: Admin details

d. **Campaign Notes** - View the Email and/or SMS content that will be sent out as part of the campaign



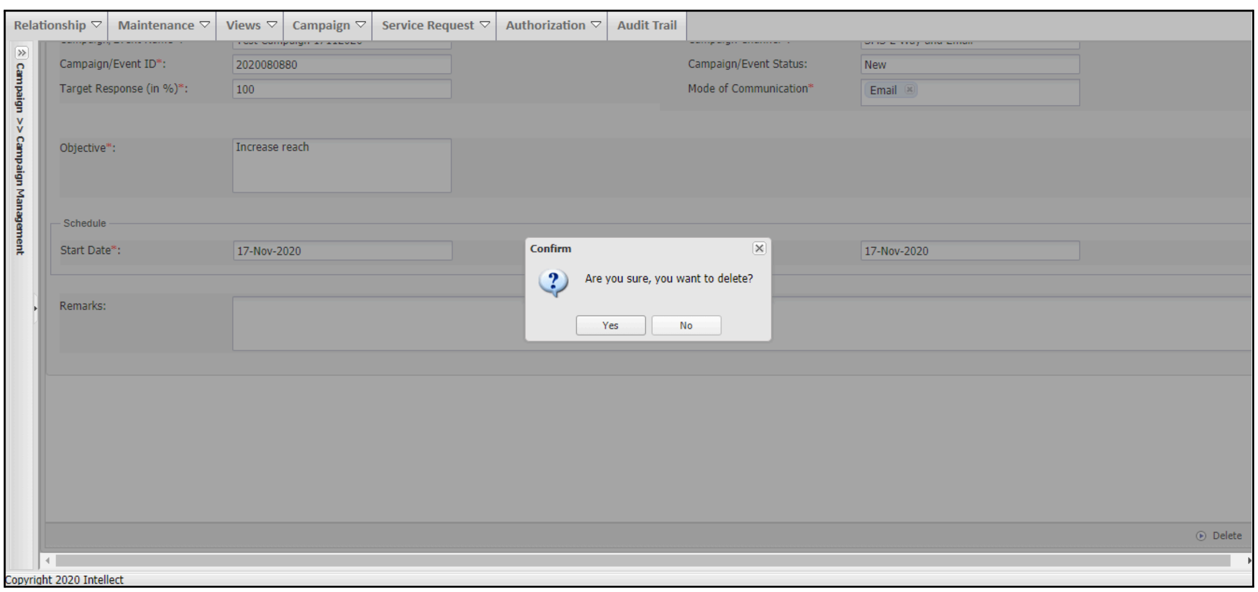
Screen: Campaign Notes

e. **Brochure** - View brochures related to the campaign

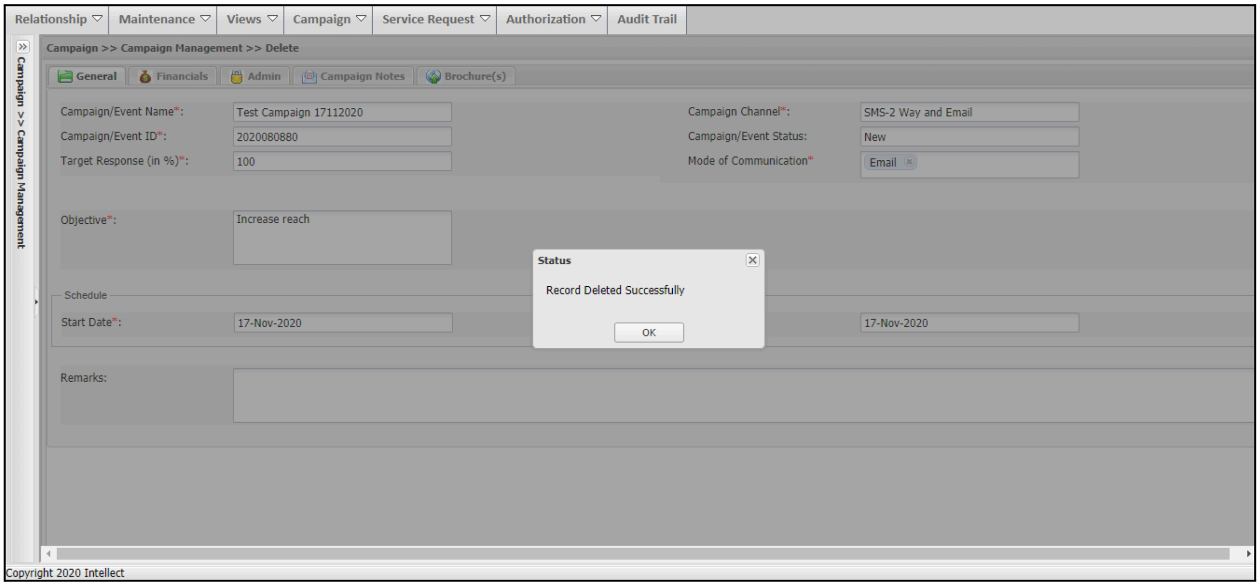


Screen: Brochures

3. After the User has viewed all relevant details in the campaign, they can perform the following actions:
   a. **Delete** - Click on the "Delete" button to delete the campaign. After the Record has been successfully deleted, they can click on the "Ok" button on the overlay to navigate back to the Campaign Management screen

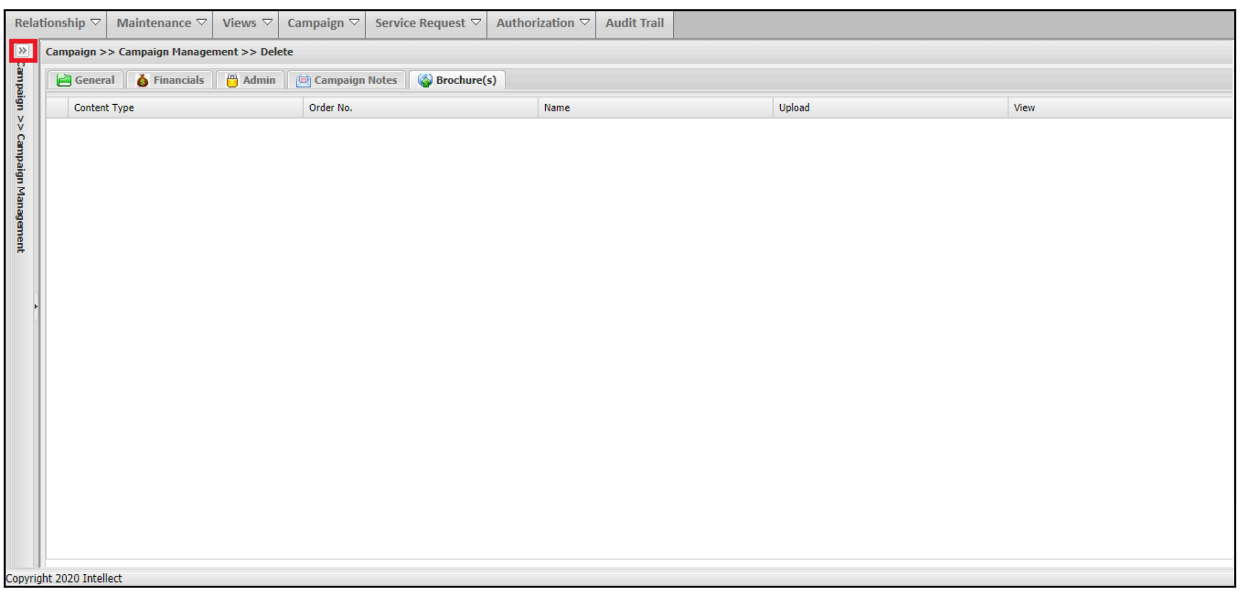


Screen: Delete Campaign

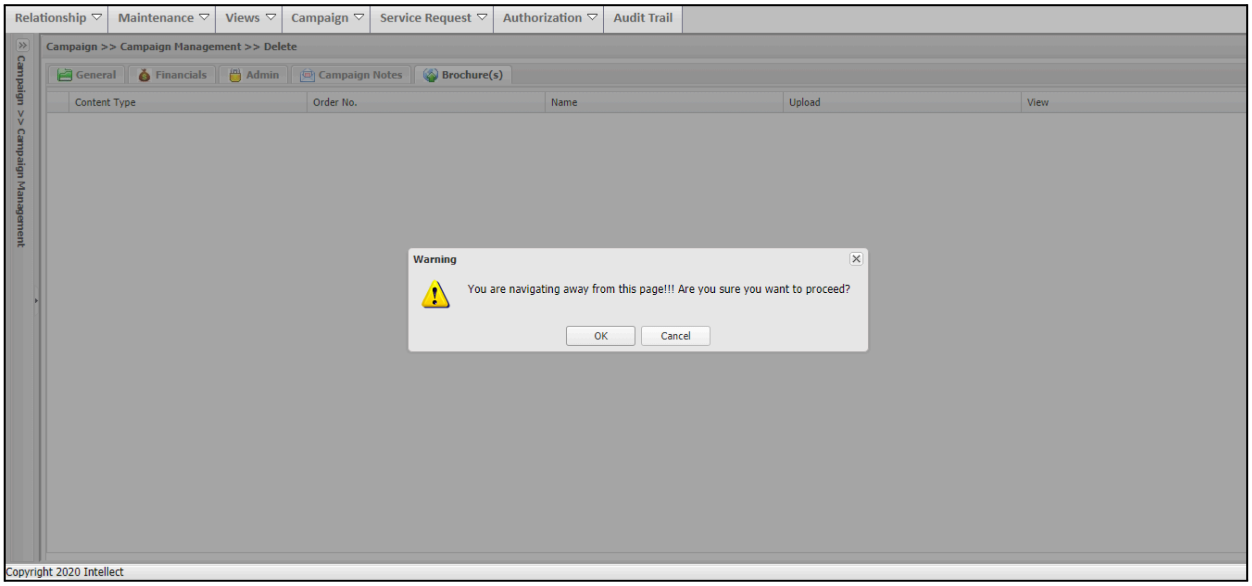


Screen: Campaign successfully deleted

b. **Close** - Click on the “Double Arrow” button on the top left corner of the screen, and subsequently on the “Ok” button to navigate back to the Campaign Management screen, without deleting the campaign



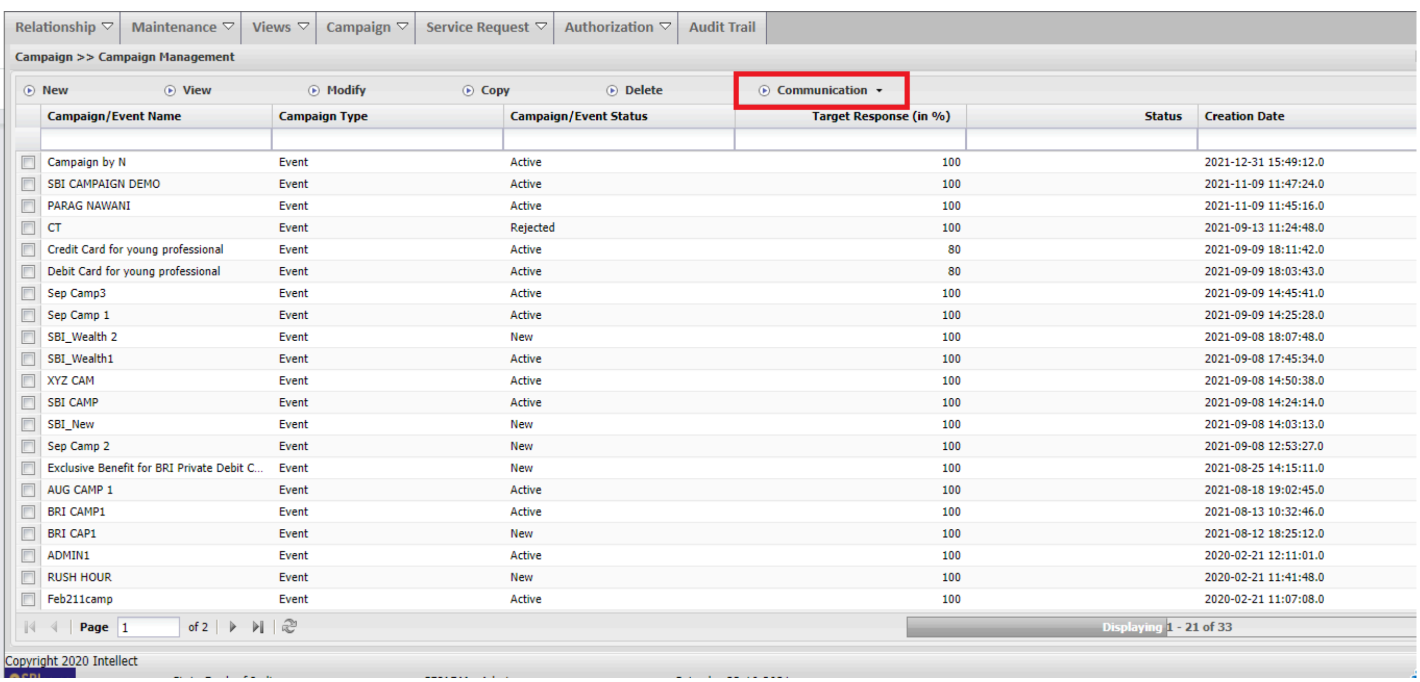
Screen: Close Campaign



Screen: Confirm Close

4.3.6 Campaign Communication

1. Campaign Email/SMS can be broadcasted to the customer during the campaign timeline (Campaign Start Date and End Date included) for active and authorized campaigns by selecting the campaign record and "Communication" button



Screen: Campaign Communication

2. Email/SMS Communication can be selected by clicking on the Send Mail (Email) and Send SMS (SMS)

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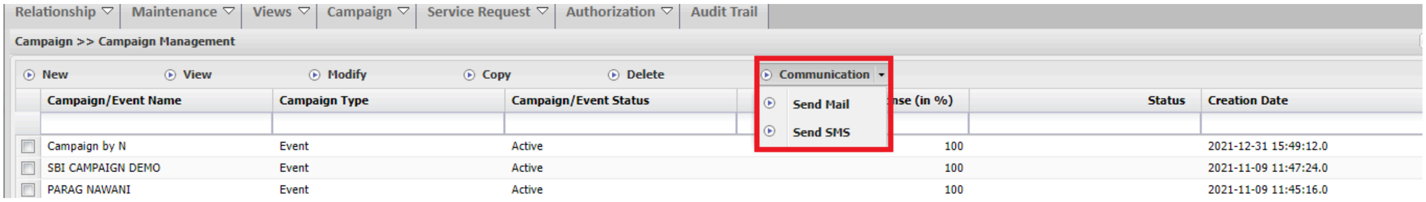
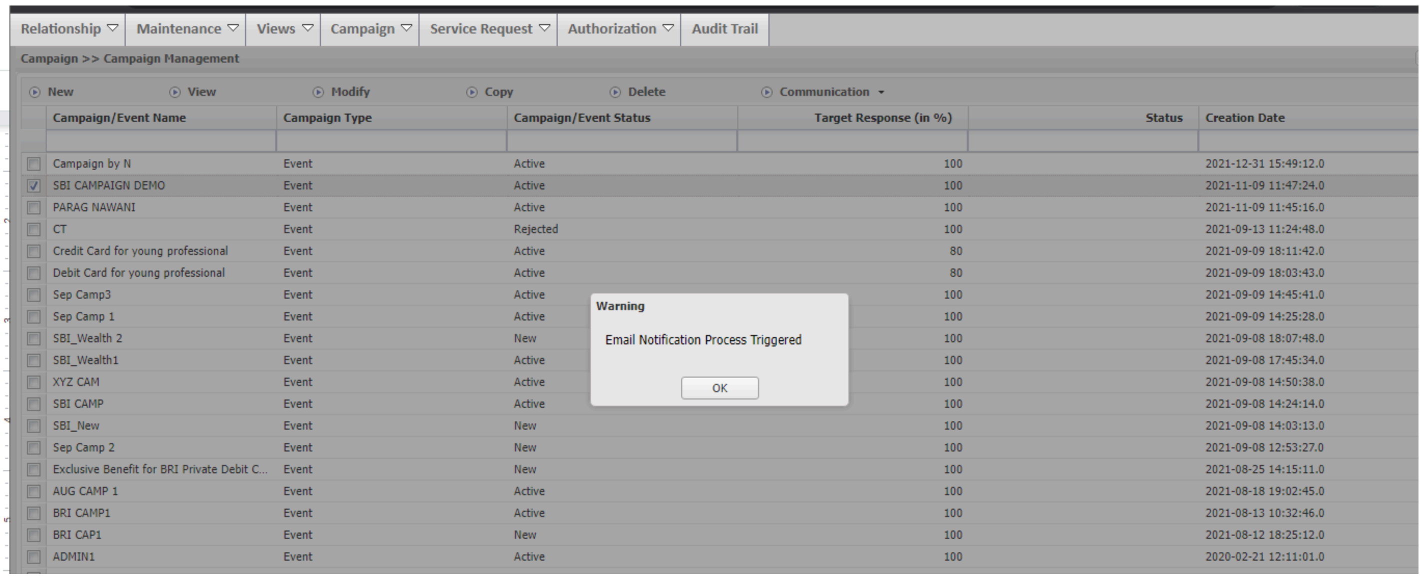
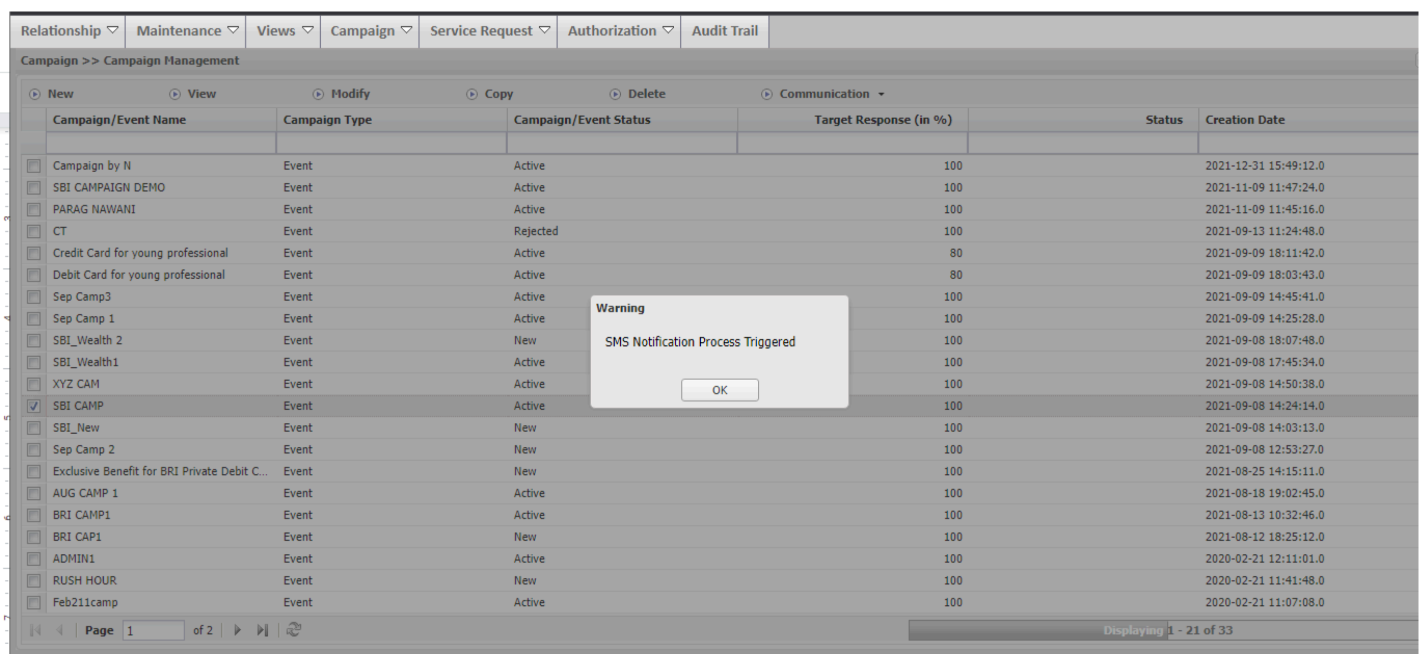


Screen: Campaign Communication – Send Mail/Send SMS

3. Broadcast status will be shown by the system for Send Mail/Send SMS



Screen: Campaign Communication – Send Mail Status

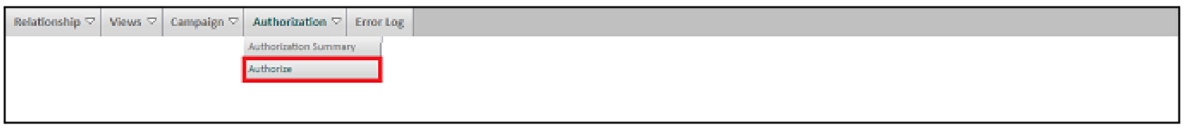


Screen: Campaign Communication – Send SMS Status

4.3.7 Supervisor Approval

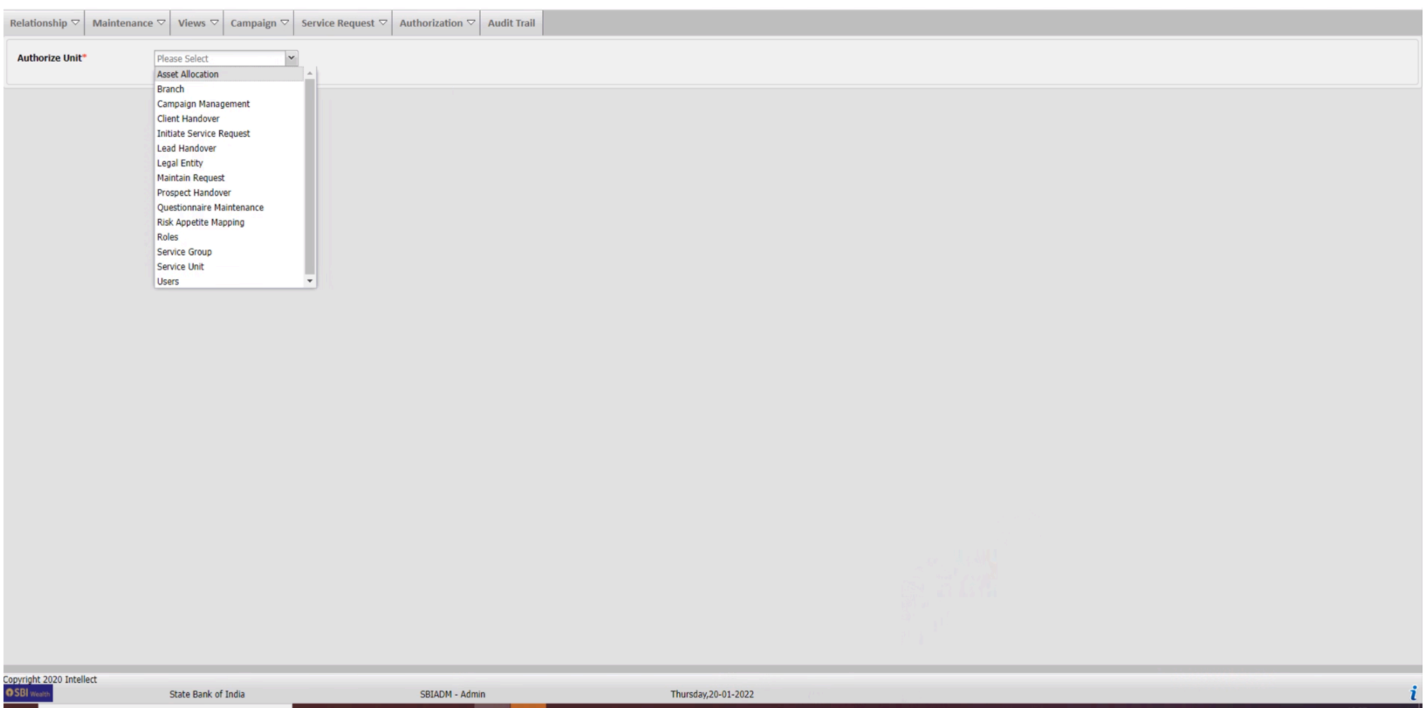
1. A Campaign would need to be **approved by the Supervisor** in the following cases:
   a. Define a New Campaign
   b. Modify an Existing Campaign
   c. Copy a Campaign

2. After logging in, the Supervisor would hover over the “Authorization” menu option and select “Authorize” sub menu from the dropdown



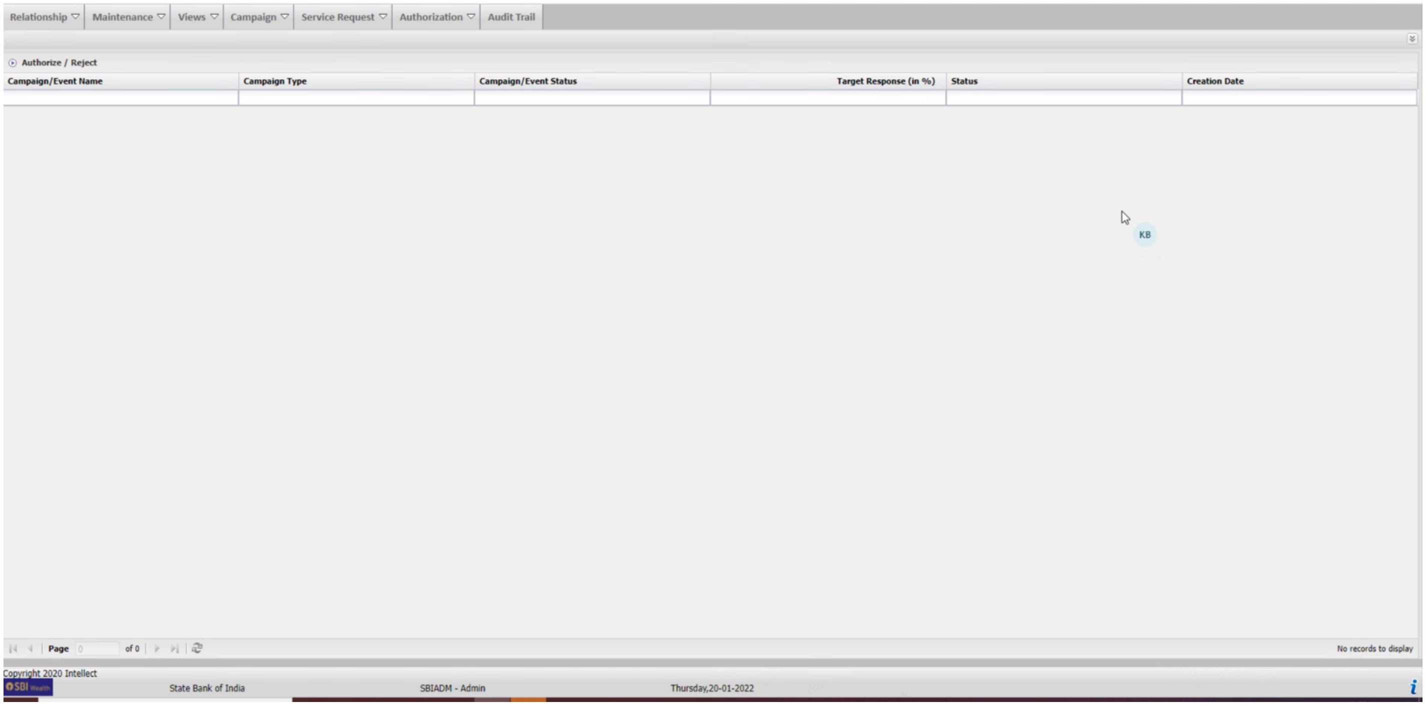
Screen: Click on Authorize

3. Once on the Authorize screen, the Supervisor then needs to select the “Campaign Management” option from the Authorize Unit dropdown to navigate to the Authorize Campaign screen



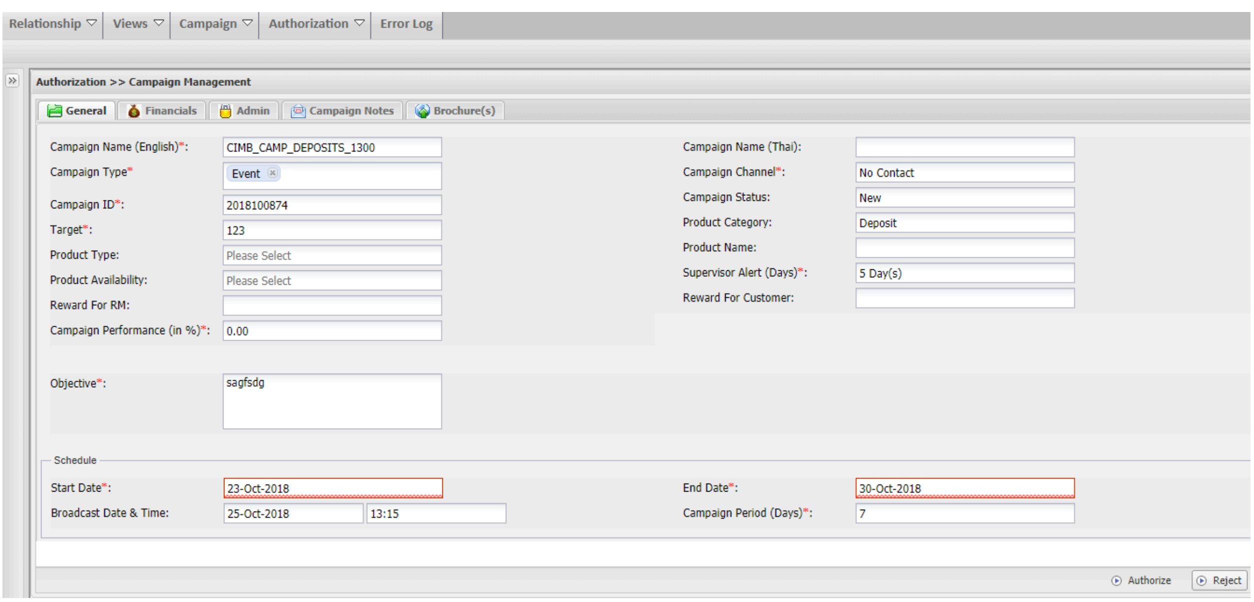
Screen: Select Campaign Management

4. The Supervisor can select any Campaign and click on the “Authorize/Reject” button to view the selected campaign details, and Authorize/Reject the same



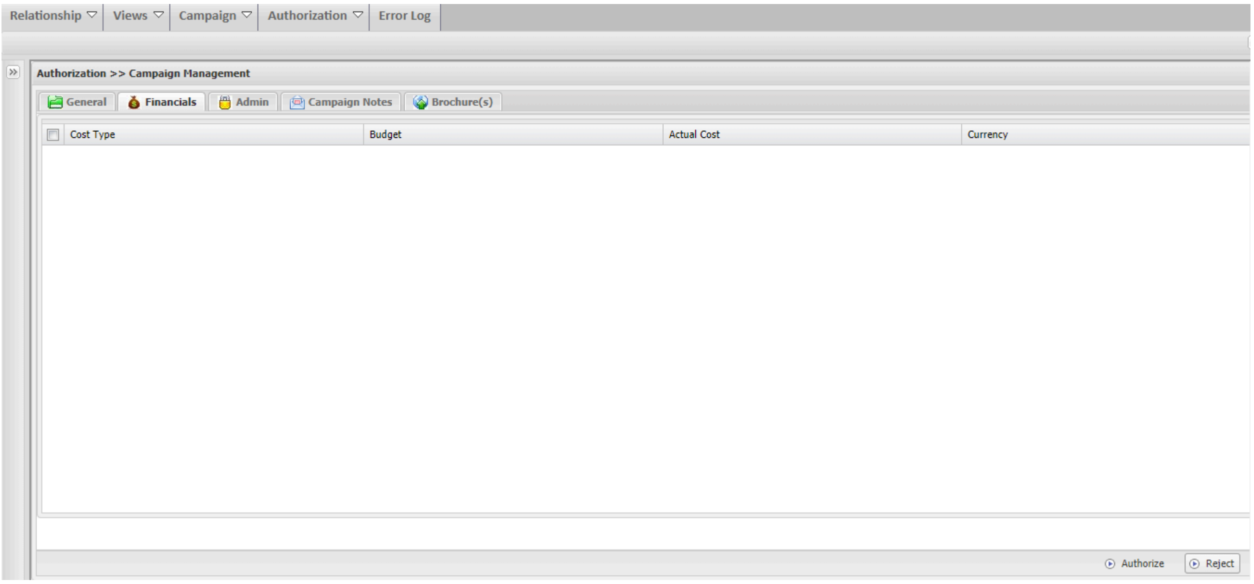
Screen: Campaign to Authorize/Reject

5. Once on the Authorize Campaign screen, the Supervisor can navigate through the following tabs to view details:
    a. **General** - View General Information such as Campaign Name, Channel etc.



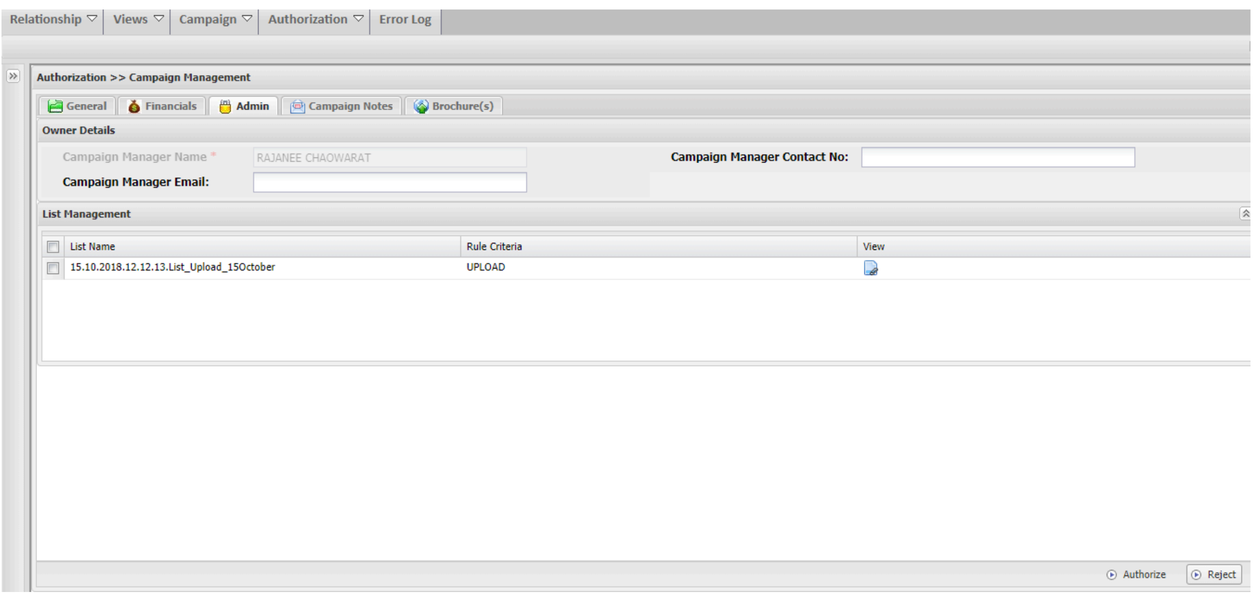
Screen: Campaign General Details

    b. **Financial** - View Financials such as Advertisement and Budget cost



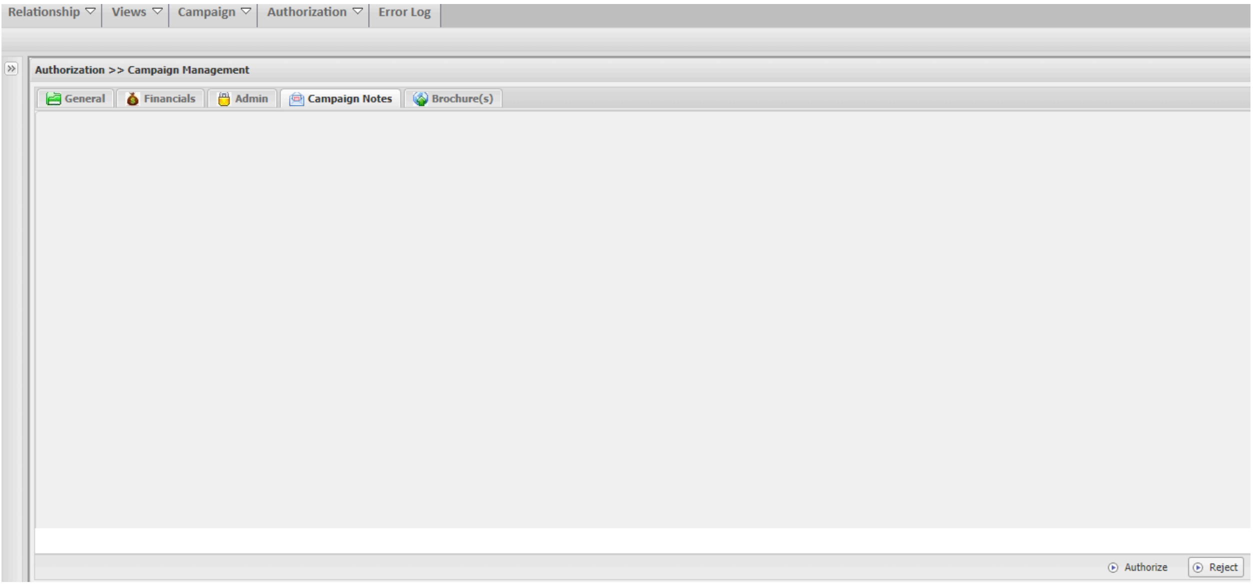
Screen: Campaign Financials

c. **Admin** - View Campaign Manager details, selected target List



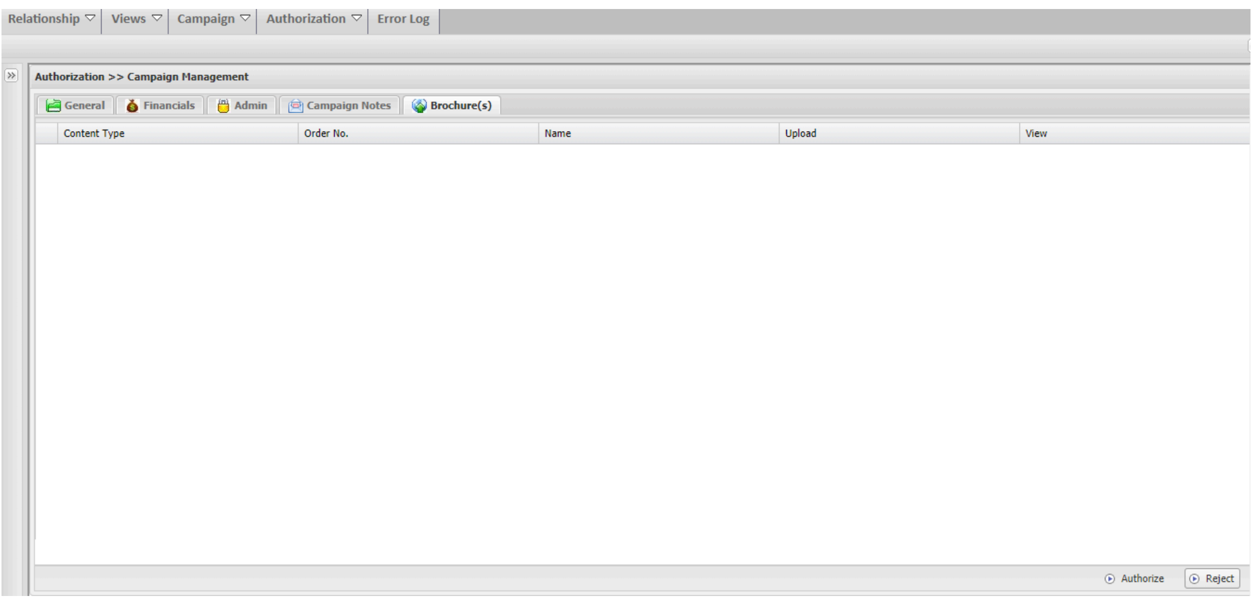
Screen: Campaign Admin details

d. **Campaign Notes** - View content for the Email and/or SMS that will be sent out as part of the campaign



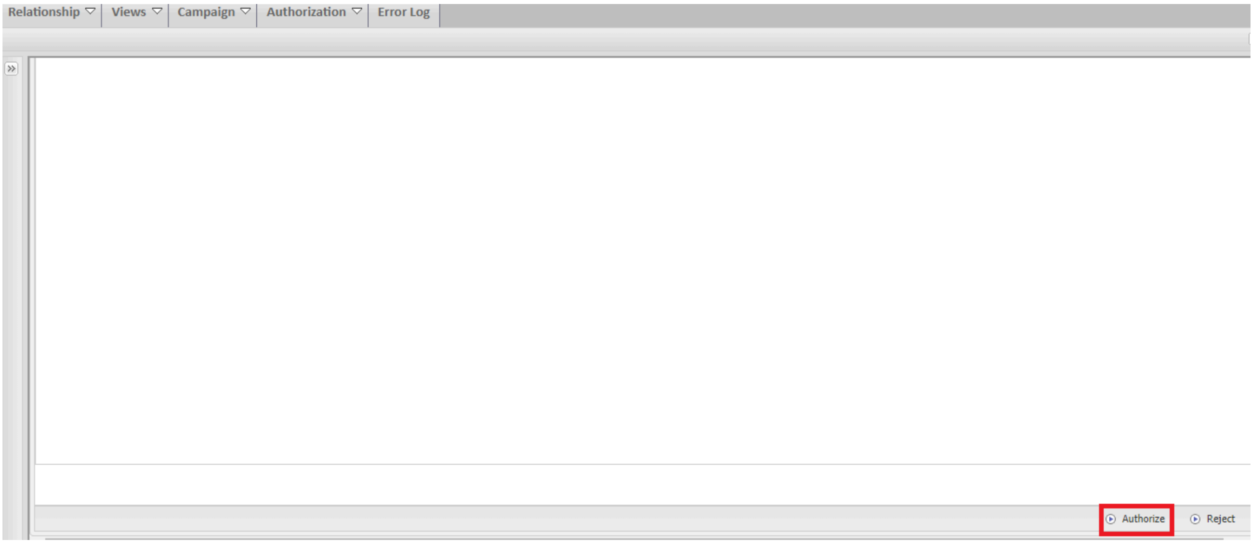
Screen: Campaign Notes

e. **Brochure** - View brochures related to the campaign



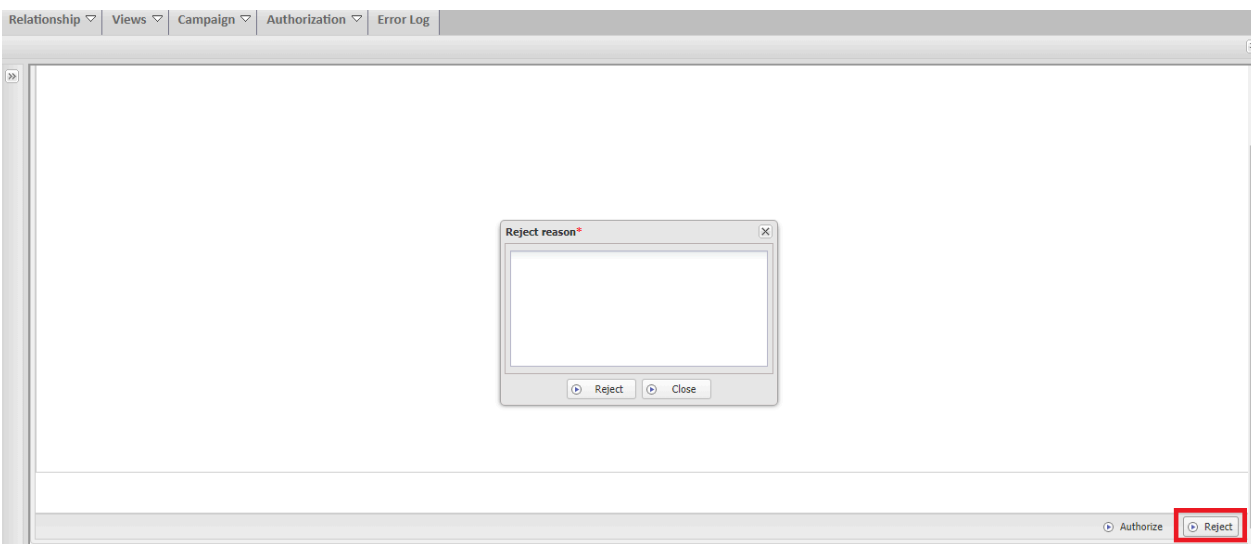
Screen: Brochures

6. After Viewing the Campaign details, the Supervisor can do the following:
   a. **Authorize** - Click on the "Authorize" button to approve the campaign



Screen: Authorize the Campaign

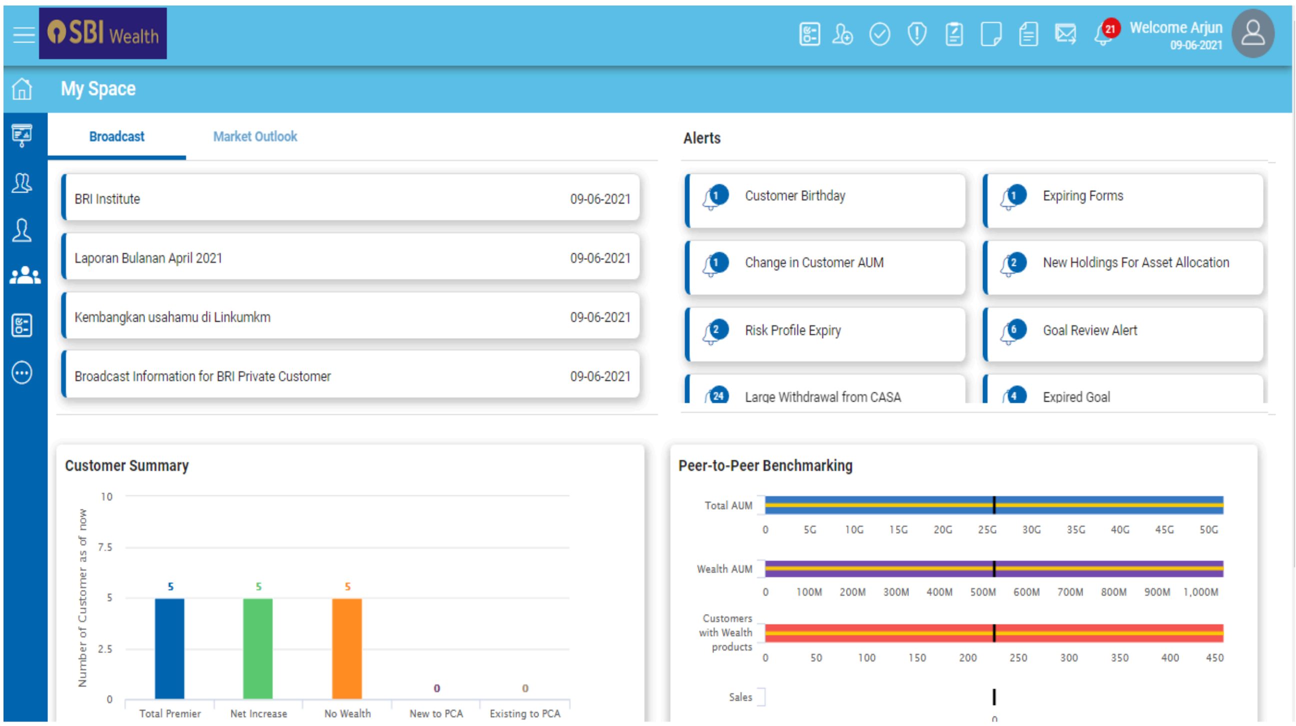
b. **Reject** - Click on the “Reject” button to capture the Reject Reason, and subsequently on the “Reject” button on the overlay to reject the Campaign



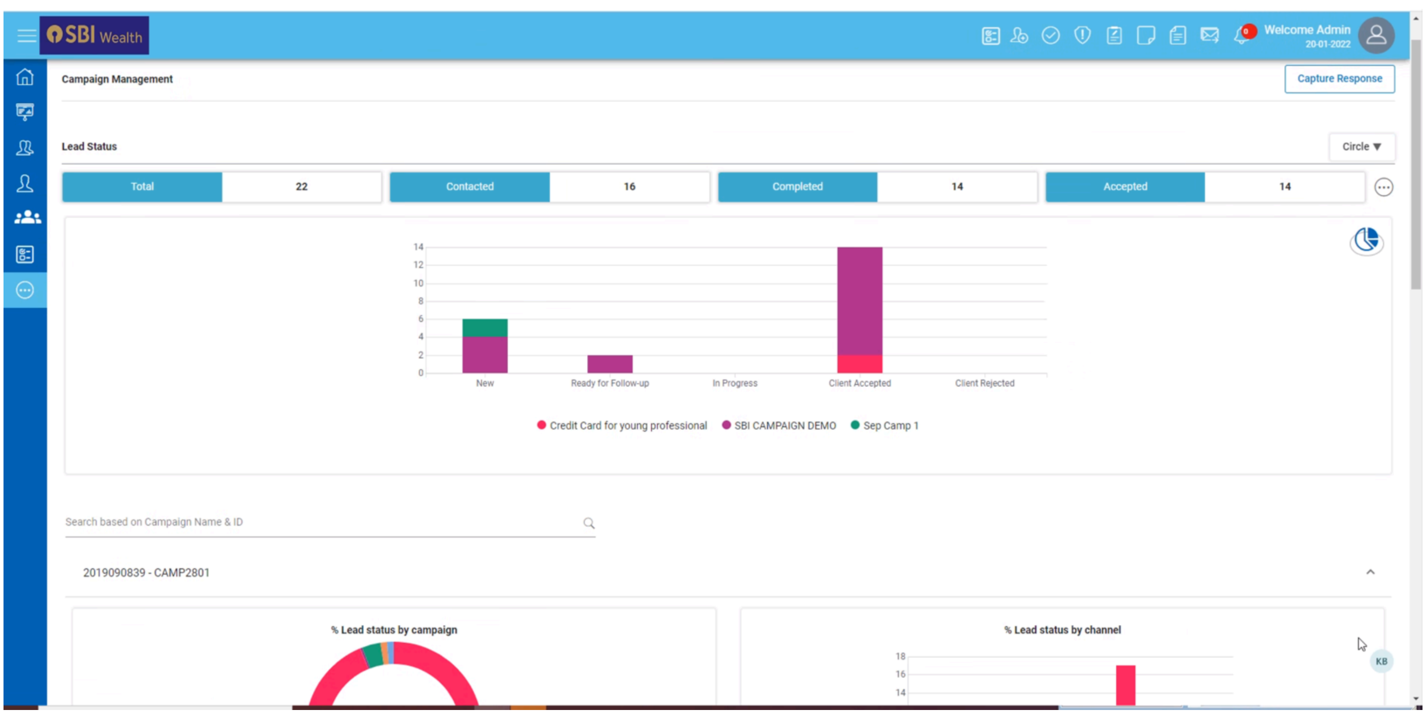
Screen: Reject the Campaign and capture Reject Reason

4.3.8 View Campaign Dashboard

1. The Campaign Dashboard can be accessed from the PMS Module. Once the User has logged into PMS, they can navigate to the Campaign Dashboard by clicking on the Campaign Management widget on the left panel. On the Campaign Dashboard screen, the User can
   a. View and Track all metrics related to the active campaigns tagged to them
   b. Navigate to the Capture Response screen

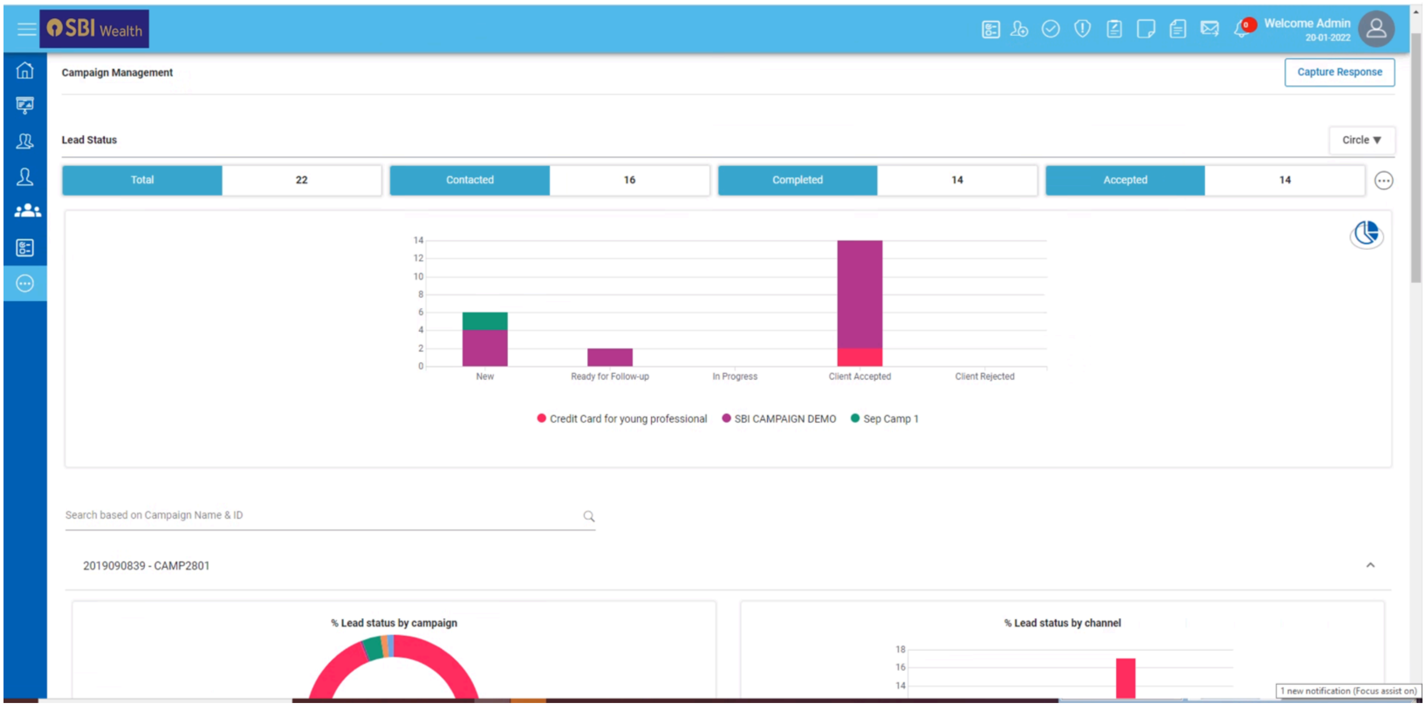


Screen: Navigating to the Campaign Dashboard

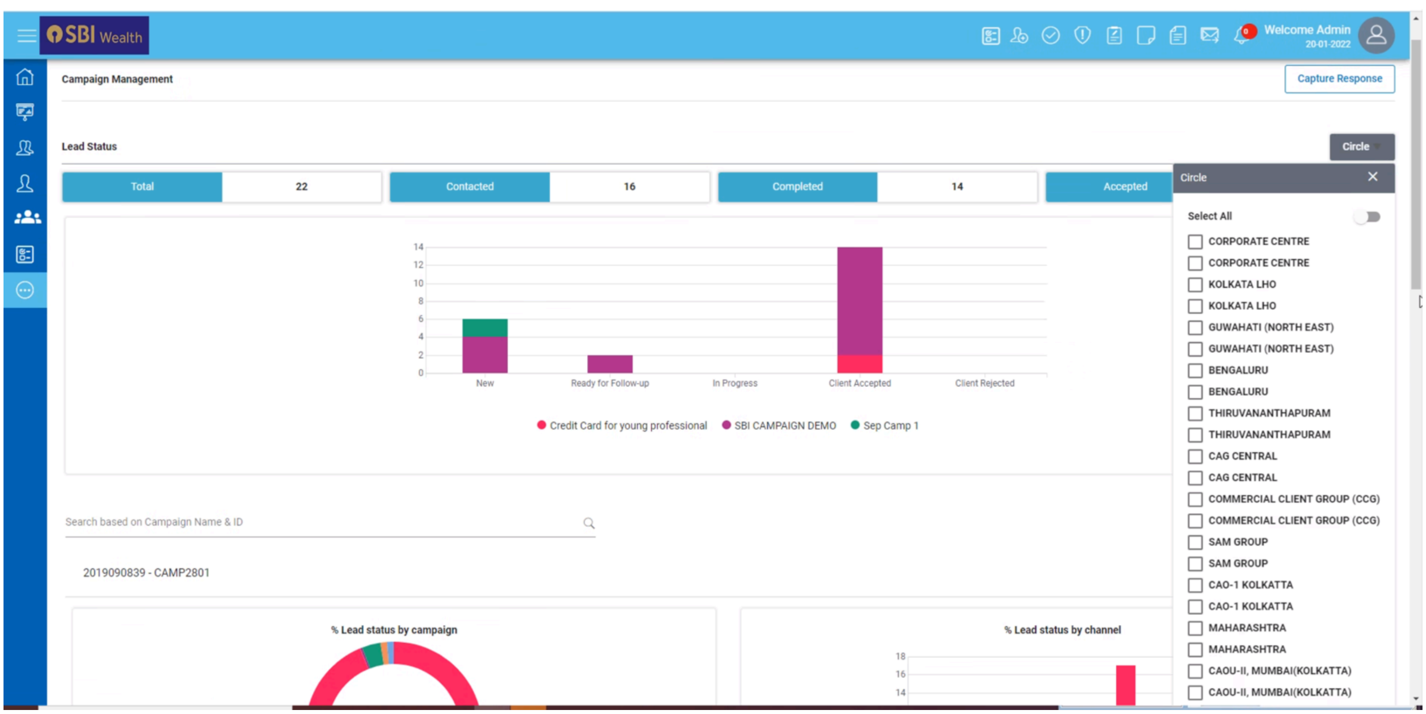


Screen: Campaign Dashboard

2. The User can apply filters by clicking on the “Circle” button to show the Lead Status for the selected regions for active campaigns

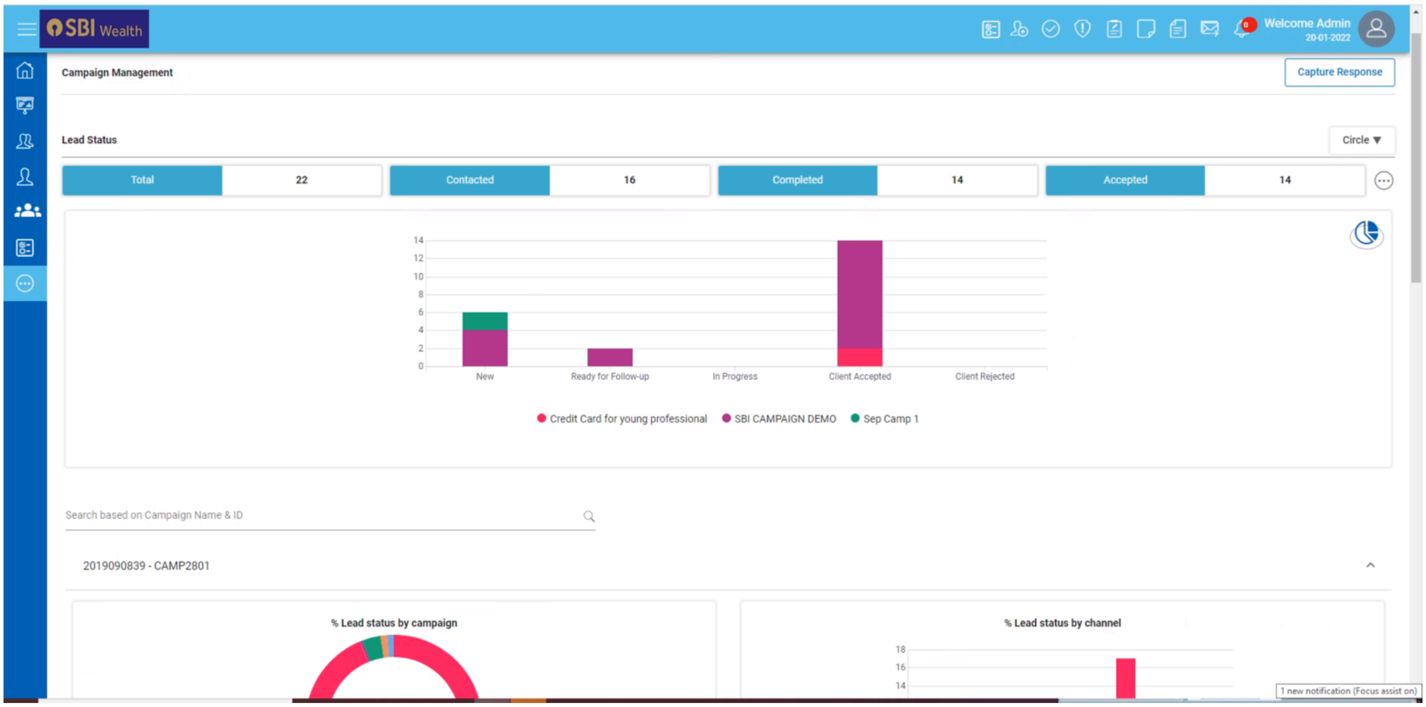


Screen: Filter and Three Dots

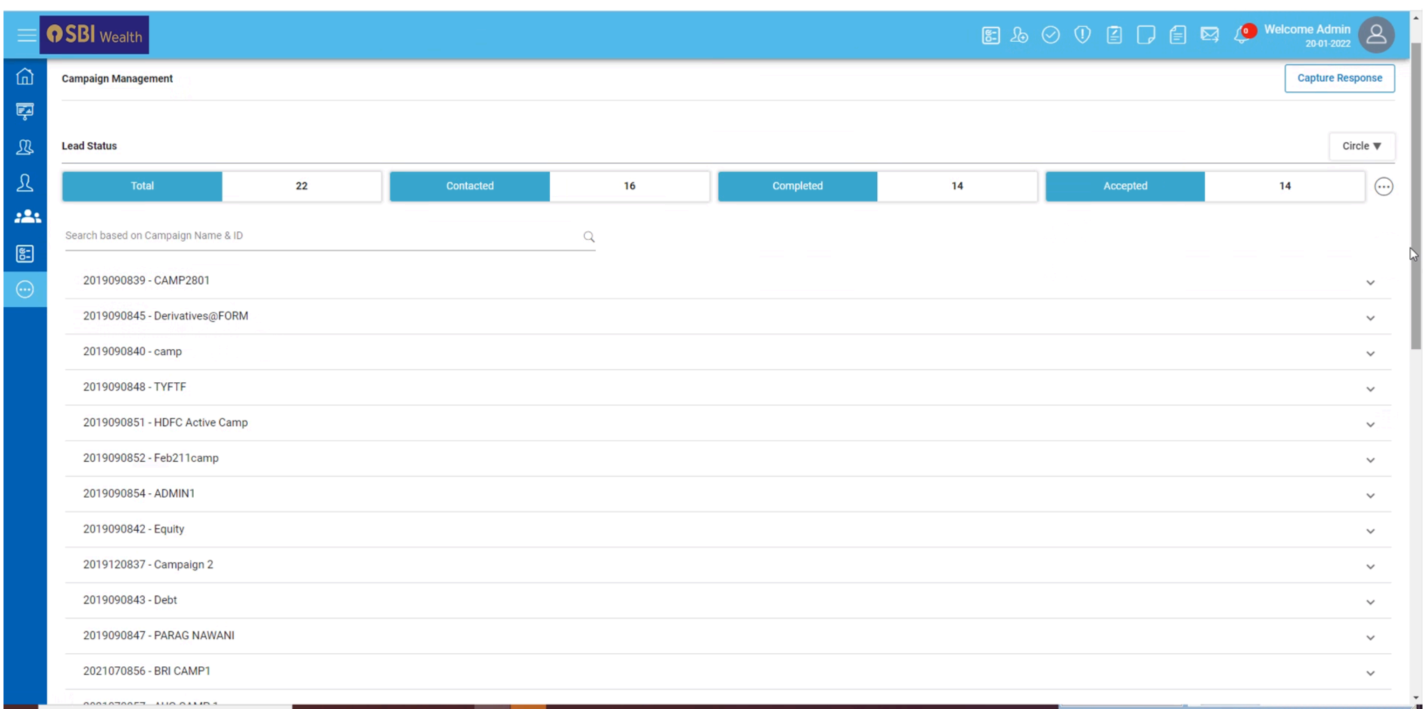


Screen: Select Region Filter

3. The User can collapse the Graphs by clicking on the “Three Dots” button should they wish to. The graphs can be expanded by clicking on the “Three Dots” button again

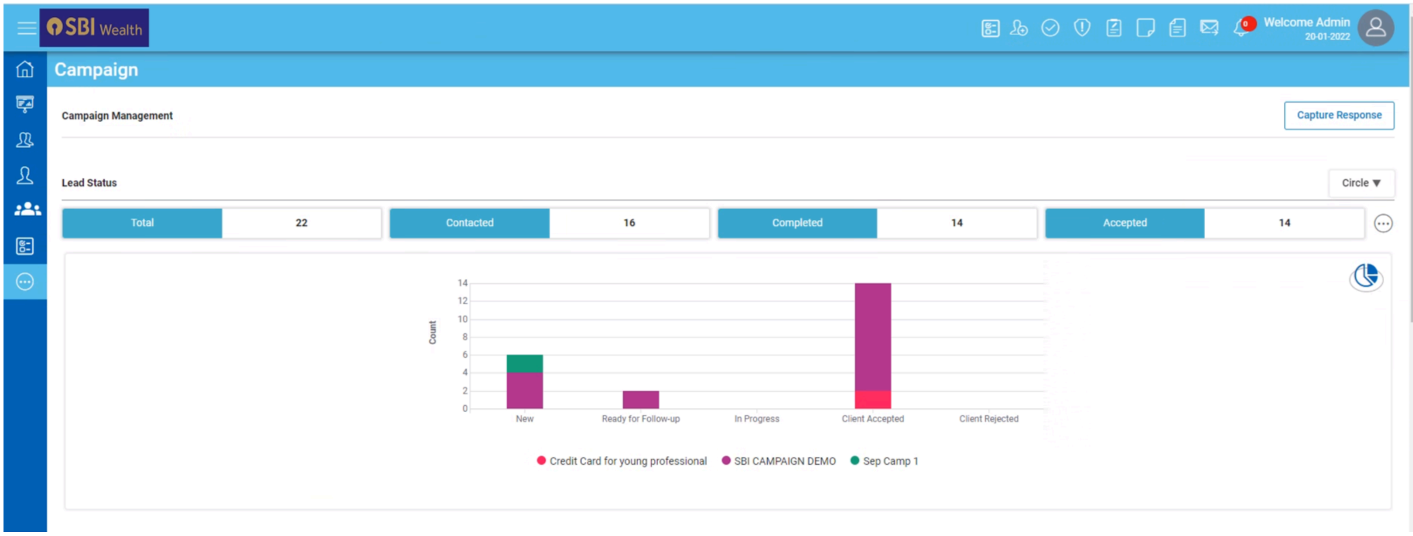


Screen: Three Dots – Expanded View

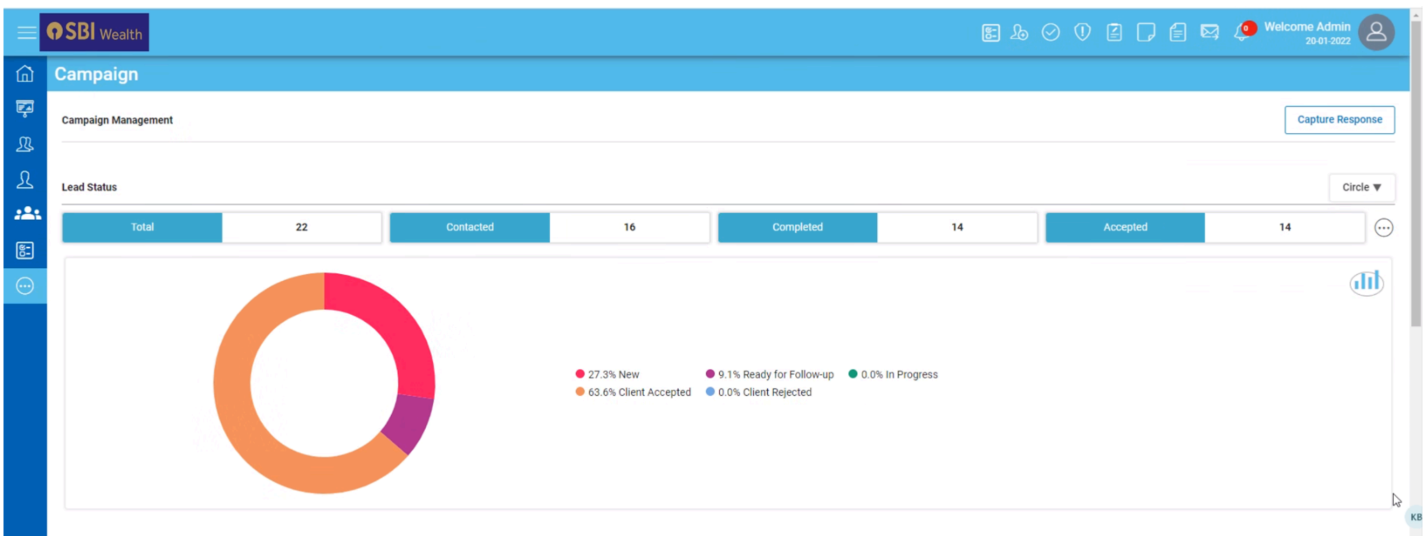


Screen: Collapsed Graphs

4. The User can switch between a Column chart or Pie Chart view by clicking on the button (highlighted) on the top right corner of the graph

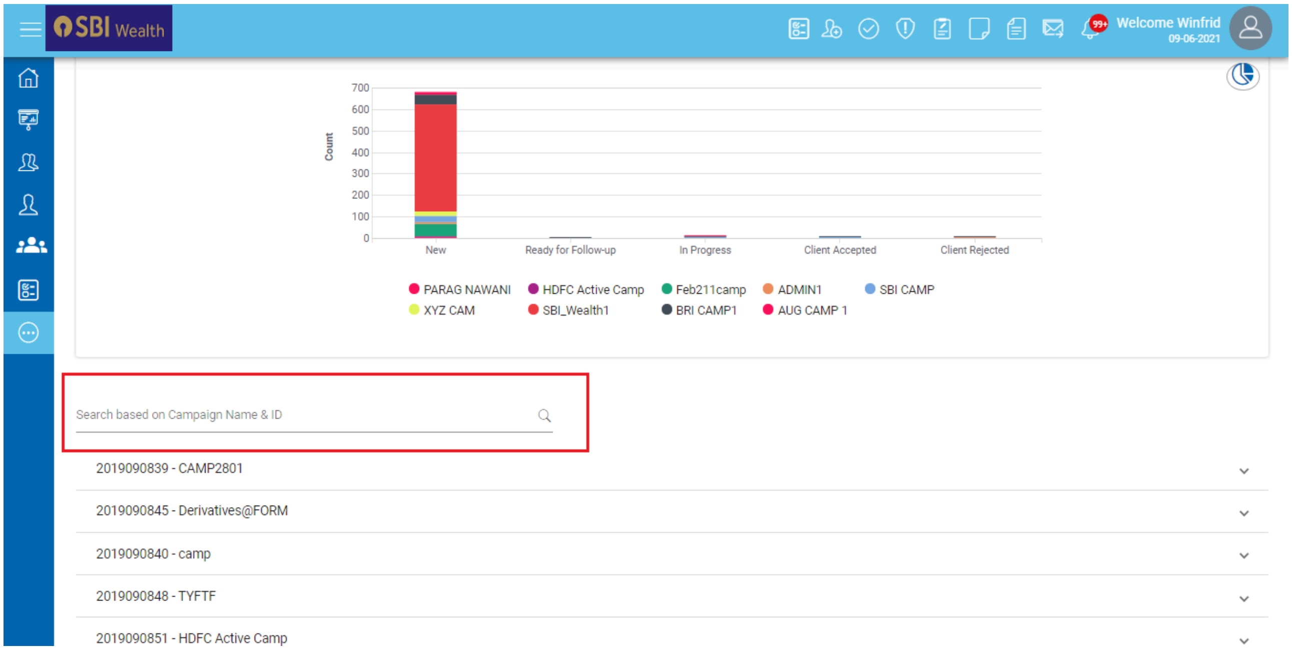


Screen: Column Chart View



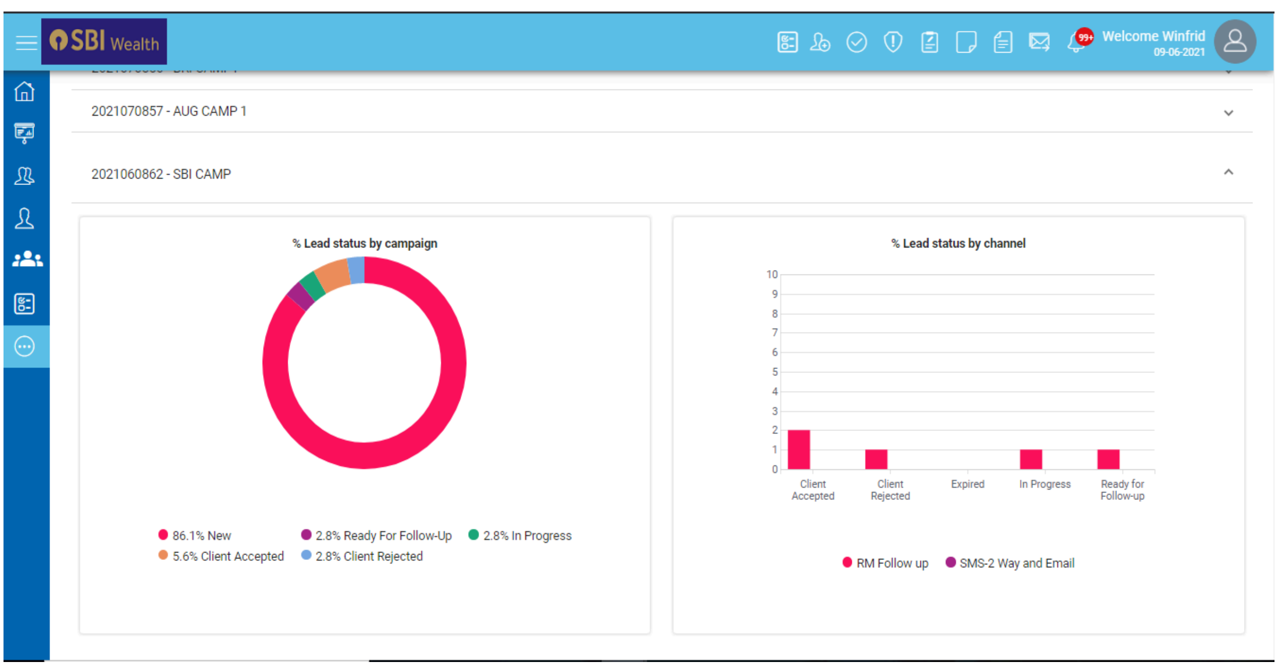
Screen: Pie Chart View

5. The User can view the campaign specific lead status either by searching for the Campaign by entering the Campaign Name and ID, or by clicking on the "Down Arrow" beside the campaign name to expand the view. This view can be collapsed by clicking on the "Up Arrow" beside the Campaign name



Screen: Search for a Campaign

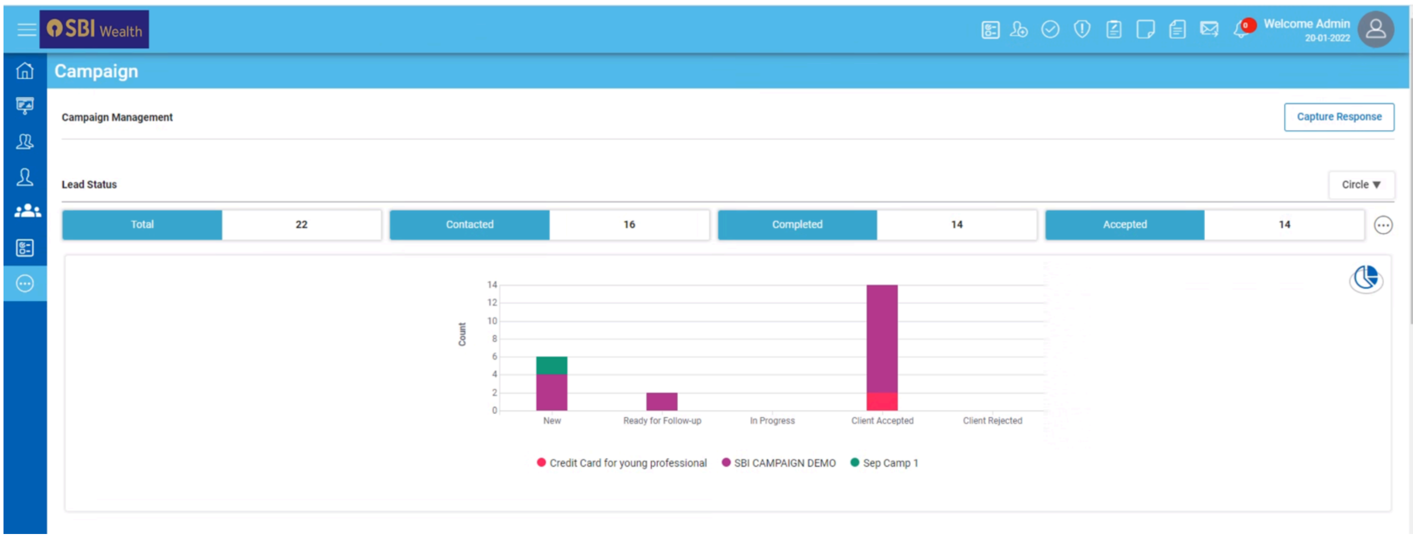
6. The "Lead status by campaign" and Lead status by channel" is displayed to the user. Leads who are followed up by the RM (RM updates the lead response status – refer to section 4.3.9 Capture Responses) would be tracked under the "RM Follow up" channel. Leads for whom the response status is received through campaign communication channels (SMS-2 way and Email, SMS-2 way, SMS-1 way, Email, SMS-1 way and Email) can be uploaded in the system and would be tracked under the respective campaign communication channel (refer to section 4.2.2 Lead Upload for the process steps of uploading Campaign Response Status File). The process steps are same for Lead Upload and Campaign Response Upload (refer to section 8 Annexure for Campaign Response Upload Template)



Screen: Individual Campaign Lead Status

4.3.9 Capture Responses

1. The User can navigate to the Capture Response screen by clicking on the “Capture Response” button on the Campaign Dashboard screen. On this screen, the User can capture Lead Responses for active campaigns tagged to them



Screen: Navigating to the Capture Response screen

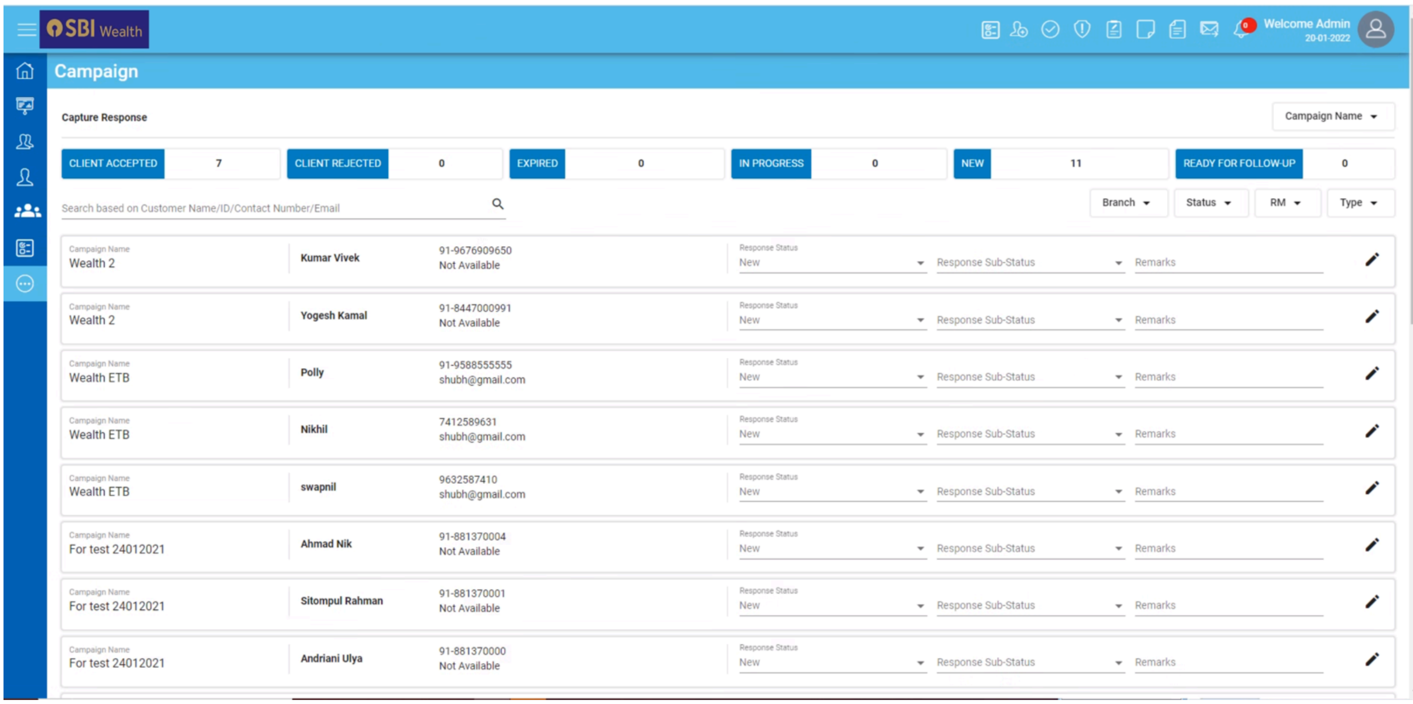
2. After navigating to the Capture Response screen, the User can use the following filters available to help them capture Lead responses:
    a. Campaign Name - Filter by Campaign Name
    b. Branch - Filter by Branch
    c. Sub-Status - Filter by Lead Sub Status based on the Lead Status such as Call Back, Uncontactable – Max Attempt etc.
    d. Status - Filter by Lead Status such as New, Ready for Follow Up, In Progress, Client Accepted, and Client Rejected
    e. RM - Filter by RM
    f. Type - Filter by Type for Lead and CIF (If the Lead is existing wealth customer)

3. The User can search for a Lead by entering anyone of the following:
    a. Customer Name
    b. Customer ID
    c. Contact Number
    d. Email

4. After searching/navigating to the Lead, the User can capture the following details for the Lead:
    a. Response Status – Response statuses available are New, Ready for Follow Up, In Progress, Client Accepted, and Client Rejected
    b. Response Sub Status – Response Sub statuses available are Call Back, Uncontactable – Deceased, and Uncontactable – Max Attempt etc. , depending on the Response Status

c. Remarks – Any additional remarks can be captured

5. The summary of responses captured can be viewed on the Campaign Dashboard (refer section 4.3.7 View Campaign Dashboard)

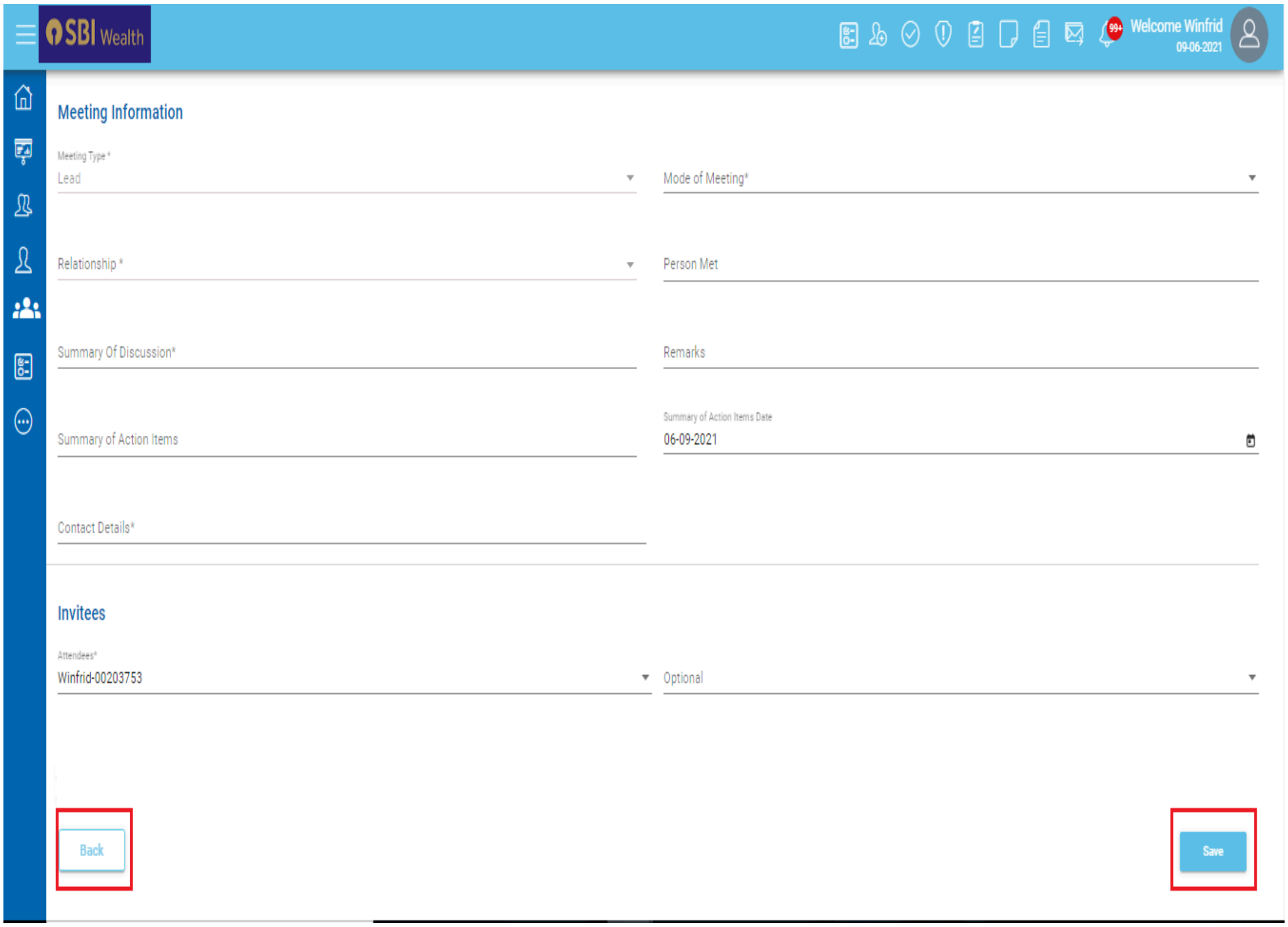


Screen: Capture Response screen

4.3.10 File Call Report

1. The User can File a call report for any Lead by clicking on icon to navigate to Call Report Screen

2. On the Call Report screen, the User can capture the following information:
   a. Meeting Particulars
   b. Meeting Information
   c. Invitees
3. After entering the relevant details, User can click on the “Save” and subsequently the “Confirm” button to save the Call Report and navigate back to the Capture Response screen. In case the User wants to clear the details filled, they can click on the “Reset” button



Screen: File Call Report

5. Field Level Details/Uploads

S No	Field Name	Field Description	Field Type	Editable	Data Type	Mandatory	List of Values	Remarks
Campaign Definition – Grid								
1	Campaign/Event Name	Displays the Campaign/Event Name	Input	No	String	Yes	Not Applicable	
2	Campaign Type	Displays the Campaign Type	Select	Yes	String	Yes	1. Event 2. Normal	
3	Campaign/Event Status	Displays the status of the campaign	Display	No	Character	Yes	1. New 2. Rejected 3. Active 4. Completed	
4	Target response in (%)	Displays the target response in (%)	Display	No	Numeric	Yes	Not Applicable	
5	Status	Displays the authorization status of the campaign	Display	No	String	Yes	1. Authorized 2. Unauthorized 3. Modified 4. Rejected	
6	Creation date	Displays the creation date of the campaign	Display	No	String	Yes	Not Applicable	
Campaign Definition – General								
1	Campaign/Event name	Inputs the Campaign/Event name	Input	No	String	Yes	Not Applicable	
2	Campaign name(local language)	Inputs the Campaign name	Input	Yes	String	No	Not Applicable	
2	Campaign Type	Displays the Campaign Type	Select	Yes	String	Yes	3. Event 4. Normal	
3	Campaign/event ID	Displays the Campaign/event ID. For a new campaign, this field is not editable	Display	No	Numeric	Not Applicable	Not Applicable	
4	Target response rate (%)	Inputs the Target response rate (%)	Input	Yes	Numeric	Yes	0-100	
5	Objective	Inputs the Objective of the campaign	Input	No	String	Yes	Not Applicable	
6	Campaign Channel	Selects the Campaign Channel for broadcasting the campaign	Select	Yes	String	Yes	1. No contact 2. SMS-2 way and Email 3. SMS-2 way 4. SMS-1 way	

		information					5. Email 6. SMS-1 way and Email	
7	Campaign/Event Status	Displays the status of the campaign	Display	No	Character	Not Applicable	1. New 2. Rejected 3. Active 4. Completed	
8	Sub Product	Display the Types of sub products associated with campaign	Select	Yes	String	No	List of sub products	
9	Product Type	Display the Types of products associated with campaign	Select	Yes	String	No	List of products	
10	Product Availability	Displays the availability of campaign product	Select	Yes	String	No	1.Yes 2.No	
11	Product Name	Displays the name of product	Input	Yes	String	No	Not Applicable	
12	Reward For RM	Displays the reward to RM on successfully achieving the campaign targets	Input	Yes	String	No	Not Applicable	
13	Reward for customer	Displays the reward to customer if he/she subscribe to the campaign	Input	Yes	String	No	Not Applicable	
14	Campaign Performance (%)	Displays the campaign performance	Input	Yes	Numeric	Yes	0-100	
15	Mode of communication	Selects the mode of communication for campaign with the customer	Select	Yes	String	Yes	1. SMS 2. Telephone 3. Email 4. Face to Face	
16	Start Date	Inputs the campaign start date	Input	No	String	Yes	Not Applicable	
17	End date	Inputs the campaign end date	Input	Yes	String	Yes	Not Applicable	
18	Broadcast Date and Time	Display the date and time at which campaign information will be broadcasted	Input	Yes	Numeric	No	Not Applicable	
19	Campaign Period(Days)	Displays the period during which campaign will be active	Display	No	Numeric	Yes	Not Applicable	
20	Remarks	Inputs the remarks for the campaign	Input	Yes	String	No	Not Applicable	
Campaign Definition – Financials								

1	Cost type	Selects the Cost type for the campaign	Select	Yes	Select	No	1. Advertisement cost 2. Campaign cost	
2	Budget	Inputs the Budget for the selected Cost Type	Input	Yes	Numeric	No	Not Applicable	
3	Actual cost	Inputs the Actual Cost for the selected Cost Type	Input	Yes	Numeric	No	Not Applicable	
4	Currency	Displays the Currency for the selected cost type	Display	Yes	String	No	IDR	
Campaign Definition – Admin								
1	Campaign Manager Name	Selects the Campaign manager name	Select	No	String	Yes	List of all users	
2	Campaign Manager Contact No	Displays the Campaign manager Contact No	Display	No	String	No	Not Applicable	
3	Campaign Manager Email	Displays the Campaign manager Email	Display	No	String	No	Not Applicable	
4	List name	Selects the Lead List	Select	No	String	No	List Management Lead Lists	
5	Rule criteria	Displays the Rule criteria of the Lead List	Display	No	String	No	Not Applicable	
Campaign Definition - Admin - Lead List View								
1	List ID	Displays the List ID	Display	No	Numeric	Not Applicable	Not Applicable	
2	List name	Displays the List name	Display	No	String	Not Applicable	Not Applicable	
3	Cust No	Displays the Lead Number	Display	No	Alphanumeric	Not Applicable	Not Applicable	
4	Name	Displays the Lead Name	Display	No	String	Not Applicable	Not Applicable	
5	Entity type	Displays the Entity type if it is Lead (New to bank Customer) or CIF (Existing wealth Customer)	Display	No	String	Not Applicable	1. Lead 2. CIF	
Campaign Definition - Campaign Notes								
1	Subject	Inputs the Subject of the email for the campaign	Input	Yes	String	Yes	Not Applicable	

		communication						
2	Email Body	Inputs the Email Content for the campaign communication	Input	Yes	String	No	Not Applicable	
3	Signature	Inputs the Signature of the bank	Input	Yes	String	Yes	Not Applicable	
4	SMS	Inputs the SMS content for the campaign communication	Input	Yes	String	Yes	Not Applicable	
Campaign Definition – Brochures								
1	Content Type	Selects the Content Type to be sent as part of campaign email communication	Select	Yes	Select	No	1. Attachment 2. Content	
2	Order No	Inputs the Order Number for the content type selected	Input	Yes	Numeric	No	Not Applicable	
3	Name	Inputs the Name for the content type selected	Input	No	String	No	Not Applicable	
4	Upload	Uploads the attachment for the content type	Input	Yes	Upload	No	Not Applicable	
5	View	Views the attachment uploaded for the content type	Display	Not Applicabl e	String	No	Not Applicable	
List Management – Grid								
1	List ID	Displays the Lead List ID	Display	No	Alphanumer ic	Yes	Not Applicable	
2	List Name	Displays the Lead List Name	Display	No	Alphanumer ic	Yes	Not Applicable	
3	Rule criteria	Displays the Lead Rule criteria of the list	Display	No	Alphanumer ic	Yes	1. Lead Rule Criteria 2. Upload 3. Merge	
List Management								
1	CIF	Displays the ID number of the lead	Display	No	Numeric	Yes	Not Applicable	
2	Customer Name	Displays the Name of the lead	Display	No	Character	Yes	Not Applicable	
3	Local language name	Displays the Name of the lead in local language	Display	No	Character	Yes	Not Applicable	
4	Relationship Manager Name & ID	Displays the RM ID_ RM Name of the lead	Display	No	Character	Yes	Not Applicable	

5	Branch	Displays the Branch ID_ Branch Name of the lead	Display	No	Character	Yes	Not Applicable	
6	Region	Displays the Region of the lead	Display	No	Character	Yes	Not Applicable	
Lead Rule Grid								
1	Criteria ID	Displays the lead rule Criteria ID	Display	No	Numeric	Not Applica ble	Not Applicable	
2	Criteria Name	Displays the lead rule Criteria Name	Display	No	Alphanumer ic	Not Applica ble	Not Applicable	
3	Criteria	Displays the Criteria definition of the lead rule	Display	No	Alphanumer ic	Not Applica ble	Not Applicable	
4	Status	Displays the Status of the lead rule	Display	No	String	Not Applica ble	Not Applicable	
5	Owner ID	Displays the Owner ID of user who has created lead rule	Display	No	Alphanumer ic	Not Applica ble	Not Applicable	
6	Creation Date	Displays the Creation Date of the lead rule	Display	No	String	Not Applica ble	Not Applicable	
Lead Rule								
1	Criteria Name	Inputs the criteria name for the lead rule	Input	Yes	Alphanumer ic	Yes	NA	
2	Select Criteria	Selects the criteria for the lead rule	Select	Yes	String	Yes	Segment Differently Abled Person ISA Form Client category Tax Statu Wealth Hub Total AUM/ Credit Global Equity Holdings Regional Equity holdings LOANSHOLDING Alternative Holdings Cash & Equity Holdings Fixed Income Holdings Local Equity Holdings Currency Global Equity Last purchase Regional Equity Last purchase Loans Last purchase Alternative Last purchase	

							Cash & Equity Last purchase Fixed Income Last purchase Local Equity Last purchase No. of Product Type Holdings Product Name Current Age Birthday Gender Citizenship Last Contacted Risk Appetite Marital Status No. of dependents CIS creation date Branch City/Town State Postcode Employer Customer Category Type of Business Unit Deposits Holding Investment Holding Insurance Holding Loan Holding Current account Holding Savings account Holding Fixed deposit Account Holding Mutual Fund Holding Bonds Holding Equity Holding Structured investment Holding Car insurance Holding Personal insurance Holding Life Insurance Holding Property Insurance Holding Property loan Holding Overdraft/personal loan Life Insurance Last Purchase Property Insurance Last Purchase Property loan Last Purchase	

							Personal loan Last Purchase Cash plus Personal Loan Last Purchase	
3	Condition	Selects the Condition for the lead rule	Input	Yes	String	Yes	Logical Operators	
4	Please select a record	Selects/Inputs the entity for the lead rule criteria	Input/Sele ct	Yes	String	Yes	This is based on Criteria	
Campaign Dashboard								
1	Total	Displays the total leads of all the active campaigns	Display	No	Numeric	Not Applica ble	Not Applicable	
2	Contacted	Displays the number of leads contacted If campaign channel is No contact - "Client Accepted + Client Rejected + In Progress" If campaign channel is SMS/EMAIL – "Ready for follow up + Client Accepted + Client Rejected +In progress"	Display	No	Numeric	Not Applica ble	Not Applicable	
3	Completed	Displays the number of completed leads "Client Accepted + Client Rejected"	Display	No	Numeric	Not Applica ble	Not Applicable	
4	Accepted	Displays the number of leads accepted "Client Accepted"	Display	No	Numeric	Not Applica ble	Not Applicable	
5	Circle	Filters the Campaign Dashboard details for the circles selected	Filter	No	Character	Not Applica ble	List of Circles	
Lead Response – Summary								
1	New	Displays the number of leads with Response Status :New	Display	No	Numeric	Not Applica ble	Not Applicable	
2	Ready for	Displays the	Display	No	Numeric	Not	Not Applicable	

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	Follow	number of leads with Response Status : Ready for Follow Up				Applicable		
3	In Progress	Displays the number of leads with Response Status : In Progress	Display	No	Numeric	Not Applicable	Not Applicable	
4	Client Accepted	Displays the number of leads with Response Status : Client Accepted	Display	No	Numeric	Not Applicable	Not Applicable	
5	Client Rejected	Displays the number of leads with Response Status : Client Rejected	Display	No	Numeric	Not Applicable	Not Applicable	
6	Expired	Displays the number of leads expired	Display	No	Numeric	Not Applicable	Not Applicable	
Lead Response - Search and Filter								
7	Search Based on customer name/ID/Contact Number/Email	Search Based on Lead name/ID/Contact Number/Email	Input	Yes	Character	No	Not Applicable	
8	Clear	Clears the filters applied	Clear	Not Applicable	Character	Not Applicable	Not Applicable	
9	Branch	Filters the leads for the selected branch	Select	Yes	Character	No	List of Branches	
10	Status	Filters the leads for the selected Status	Select	Yes	Character	No	1. New 2. Ready for Follow Up 3. In Progress 4. Client Accepted 5. Client Rejected	
11	RM	Filters the leads for the selected RM	Select	Yes	Character	No	List of RMs	
12	Type	Filters the leads for the selected type Lead (New to bank Customer) or CIF (Existing wealth Customer)	Select	Yes	Character	No	1. Lead 2. CIF	
Capture Lead Response								
1	Campaign Name	Displays the Campaign Name of the Lead	Display	No	Character	Not Applicable		
2	Lead Name	Displays the Lead	Display	No	Character	Not		

		Name				Applica ble		
3	Lead Contact Number	Displays the Lead Contact Number	Display	No	Numeric	Not Applica ble		
4	Lead Email Address	Displays the Lead Email Address	Display	No	String	Not Applica ble		
5	Response status	Selects the Response status of the Lead	Select	Yes	Character	No	1. New 2. Ready for Follow Up 3. In Progress 4. Client Accepted 5. Client Rejected	
6	Response sub status	Selects the Response sub status of the Lead	Select	Yes	Character	No	For In Progress: Appointment Call back Deactivate Follow up Need Analysis Pending Document Requested for more information Under consideration For Client Rejected: Better competitor offer Customer hung up Do not call for telemarketing Not eligible Out of Geographical Area Poor customer experience Product Out of Scope Unattractive promo or product Uncontactable - Deceased Uncontactable - Incomplete Info Uncontactable - Invalid Telephone No. Uncontactable - Max attempt Uncontactable – Others Wrong timing	
7	Remarks	Inputs the Remarks for the Lead	Input	Yes	String	No		
Add new call report								
1	Meeting Reason	Displays the Meeting Reason as Campaign Details	Display	No	String	Yes	1. Campaign Details	
2	Subject	Inputs the Subject for the call report	Input	Yes	String	Yes	Not Applicable	

3	Start Date	Inputs the Start Date	Input	Yes	String	Yes	Not Applicable	
4	Start Time	Inputs the Start Time	Input	Yes	String	Yes	Not Applicable	
5	End Date	Displays the End Date (same as Start Date)	Display	No	String	Yes	Not Applicable	
6	End Time	Inputs the End Time	Input	Yes	String	Yes	Not Applicable	
7	Location	Inputs the lead Location	Input	Yes	String	Yes	Not Applicable	
8	Client Status	Selects the Client Status	Input	Yes	String	No	1. Client Abroad, Email Taken 2. Conference Call 3. Not Contactable 4. Not Interested In Bank Services	
9	Next Meeting Start Date	Inputs the Next Meeting Start Date	Input	Yes	String	Yes	Not Applicable	
10	Next Meeting Start Time	Inputs the Next Meeting Start Time	Input	Yes	String	Yes	Not Applicable	
11	Next Meeting End Date	Inputs the Next Meeting End Date	Display	No	String	Yes	Not Applicable	
12	Next Meeting End Time	Inputs the Next Meeting End Time	Input	Yes	String	Yes	Not Applicable	
13	State Of Mind	Selects the State Of Mind	Input	Yes	String	No	1. Happy 2. Irate 3. Satisfied 4. Sensitive 5. Ultra-sensitive	
Call Report - Meeting Information								
1	Meeting Type	Displays the Meeting Type (defaulted to Lead)	Display	No	String	Yes	1. Lead	
2	Mode of Meeting	Selects the Mode of Meeting	Select	Yes	String	Yes	1. Face-to-Face 2. In-Person 3. In-Person Off Shore 4. Others 5. Telephone 6. Telephone Off Shore 7. Video Conference 8. Video Conference Off Shore	
3	Relationship	Displays the Lead Name and Lead ID	Display	No	String	Not Applica ble	Not Applicable	
4	Person Met	Inputs the name of the Person who met the lead	Input	Yes	Character	No	Not Applicable	
5	Summary Of Discussion	Inputs the summary of discussion	Input	Yes	String	Yes	Not Applicable	

6	Remarks	Inputs the Remarks	Input	Yes	String	No	Not Applicable	
7	Opportunity	Inputs the opportunity	Input	Yes	String	No	Not Applicable	
8	Opportunity Date	Inputs the opportunity Date	Input	Yes	String	No	Not Applicable	
9	Attendees	Selects the list of attendees for the meeting	Select	Yes	String	Yes	List of users	

6. Validations

1. Mandatory Field Verification - The system will validate whether all the mandatory fields with * mark are filled in by the user or not
2. If the campaign channel is selected as Email/SMS-1 Way and Email/SMS-2 Way and Email, then user has to mandatorily define the email template at the time of campaign creation
3. If the campaign channel is selected as SMS – 1 way/SMS – 2 way/ SMS-1 Way and Email/ SMS-2 Way and Email , then user has to mandatorily define the SMS template at the time of campaign creation

7. Actors/Entitlements

1. Operations Team
2. Product Team
3. Campaign Manager
4. RM
5. Supervisor

8. Annexure

1. The template for the Lead Upload is attached below (only xls attachments are allowed)

Lead Upload
Template.xls

2. The template for the Campaign Response is attached below (only xls attachments are allowed)

Campaign
Management-Lead Re

9. Glossary

1. For the Flow Diagram
   a. L1 - This depicts the information exchange with the external systems to achieve the intent
   b. L2 - This diagram depicts the positive flow through the various processing stations

c. L3 - This diagram depicts the positive flow through the various processing stations along with the capability /action buttons

d. L4 - This diagram depicts the positive and negative flow through the various processing stations along with the capability/action buttons and back button flows

2. The terms RM Office and PMS refer to the same application and have been used interchangeably throughout this document

10. Addendum

10.1. Change Requirement

In the Base Product, Lead Response Upload template is used for uploading the bulk responses received via Email/SMS channel. Current Upload template has a Lead ID column which needs to be entered manually by the user. There should be provision of having the lead ID auto filled in the template for SBI to eliminate the manual process for the user to individually identify and type the lead ids in the response capture upload template.
To address this problem, users can download the Lead Monitoring report which comes with Lead ID. Users can then update the lead response and upload the same file to update the campaign response.

10.2. PDA Reference Number

Day 1 – 13/Sep/21 – S.No.1

10.3. Business Benefit

This change is required to eliminate the manual process for the user to individually identify and type the lead ids in the response capture upload template

10.4. Impact Analysis

10.4.1. Impact of not making the change

User experience, in the current process, the user has to individually identify the leads for which response is received and type in the upload file. This may lead to errors in the records uploaded

10.4.2. Impacted Areas

10.4.2.1. Internal Systems

S.No	Module	Functionality	Description
1	PMS	Campaign Dashboard	
2	CRM	Reports – Lead Monitoring Report	Addition of mobile no and Email ID
3	CRM	Campaign Response Upload	

10.4.2.2. External Systems

None

10.5. Solution

10.5.1. User needs to login to the application and navigate to the Customer Profile Desk.

10.5.2. Users can hover over the "View" and click on "Reports".

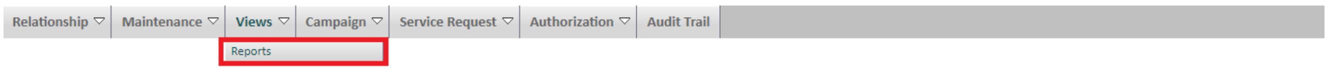


Figure: CRM landing page

10.5.3. Click on Report Type Drop down and select campaign Management.

10.5.4. Select Lead Monitoring Report from drop down list.

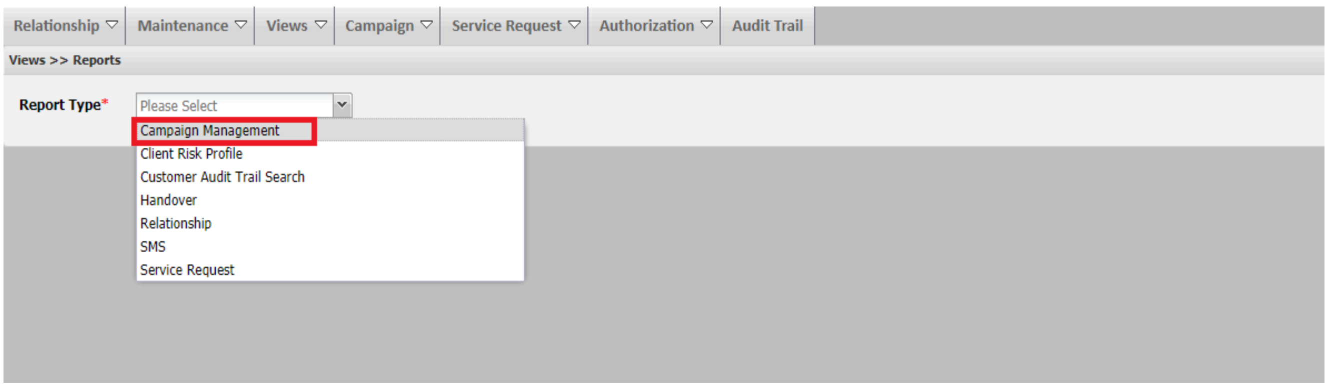


Figure: Report Screen

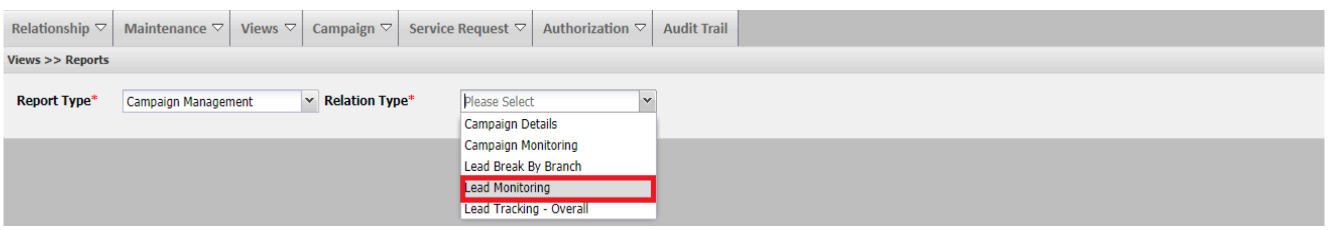


Figure: Lead Monitoring

10.5.5. Once the "Lead Monitoring" page loads up, click on "Export to Excel" button to download the format. This format will include Lead ID and other details like Mobile No, Email Id, Customer Name, Lead Status etc.

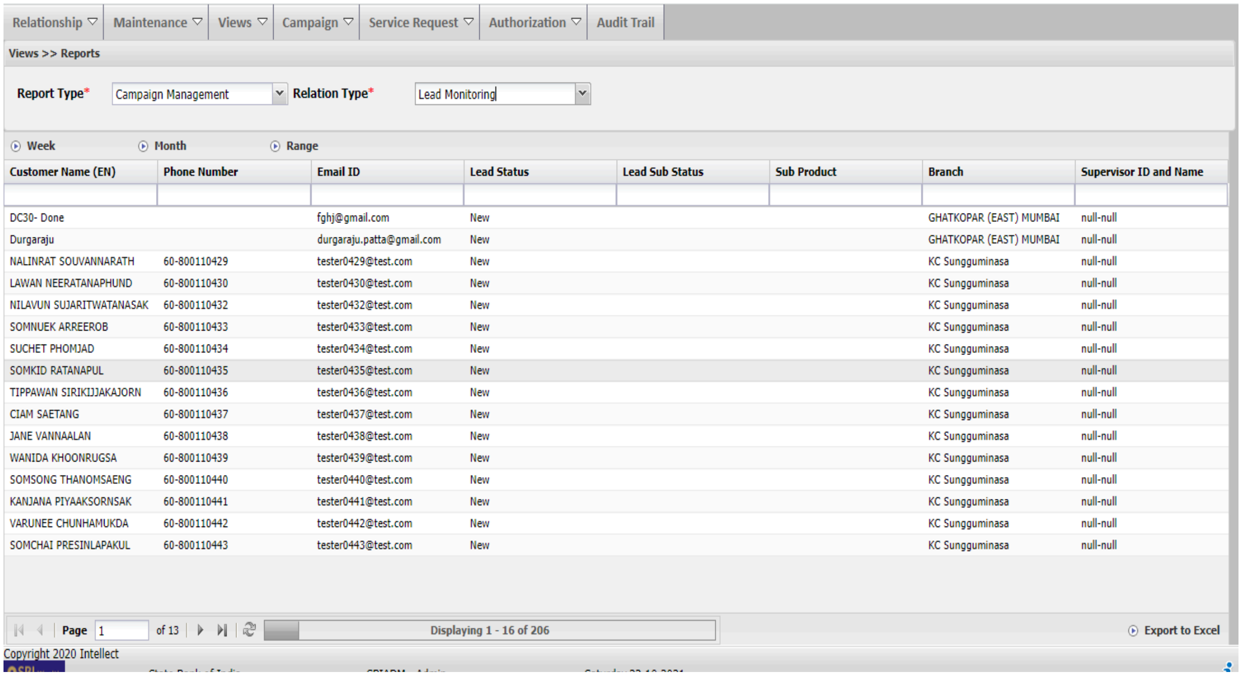


Figure: Lead Monitoring Page

10.5.6. Once the responses in column Lead status are updated in the sheet, User needs to navigate to Customer Profile Desk and select the menu ”List Management” under campaign.

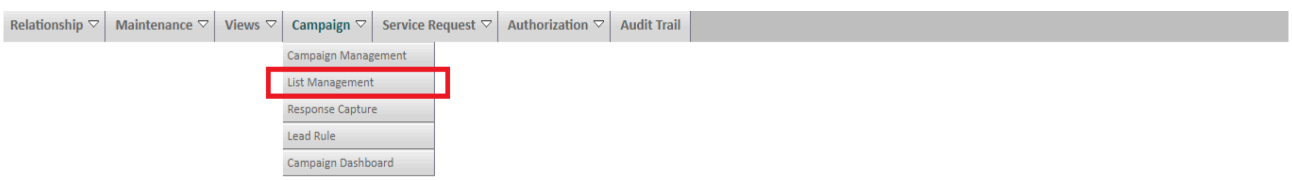


Figure: List Management

10.5.7. Once the page loads up, select Upload List.

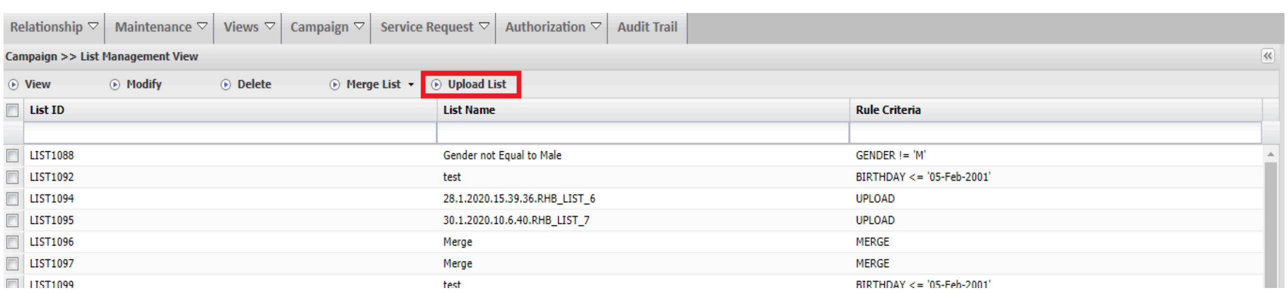


Figure: List Management

10.5.8. Select Campaign response from the drop down list and browse for the response upload file. Click on upload button to upload the list.

10.5.9. Once the upload file is processed, system will display a prompt for successful upload.

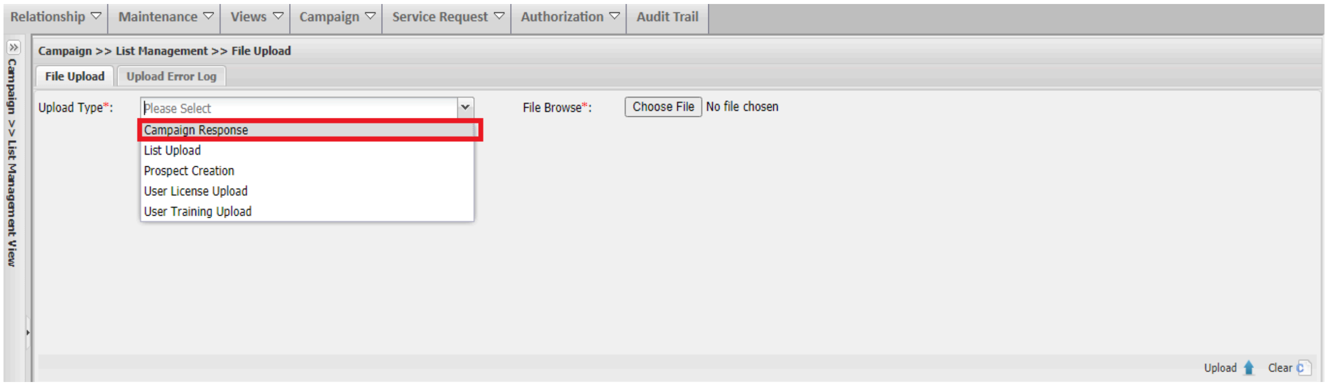
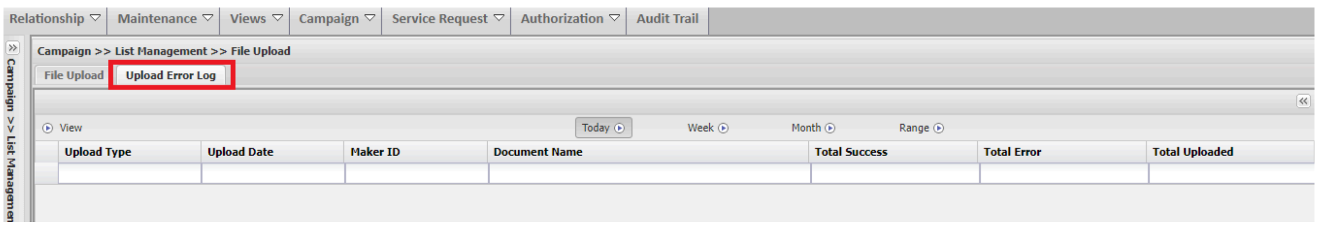


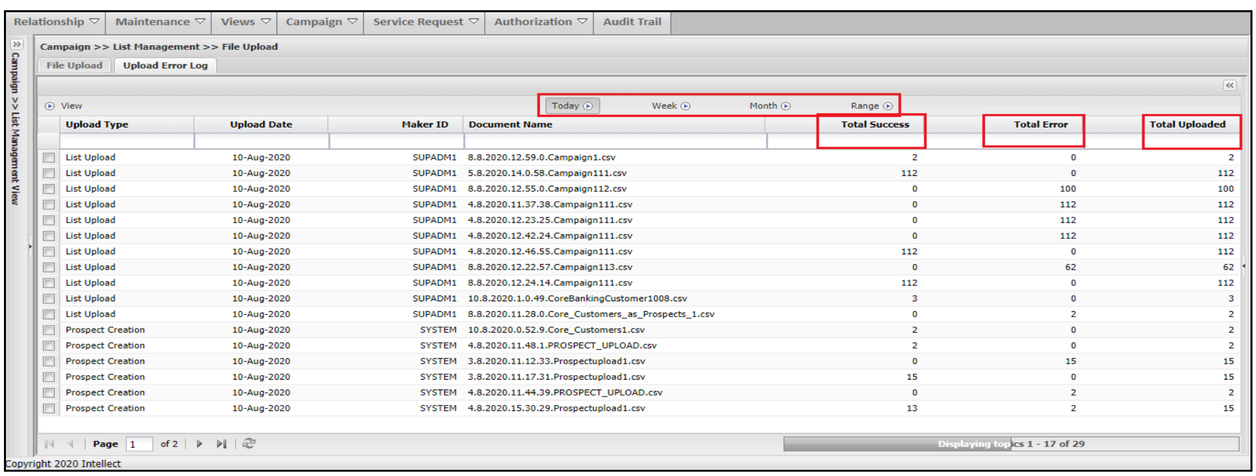
Figure: Upload Screen

10.5.10. After the upload, the system displays the result of the same in Upload Log.User clicks on "Upload Error Log" for viewing the result of the upload



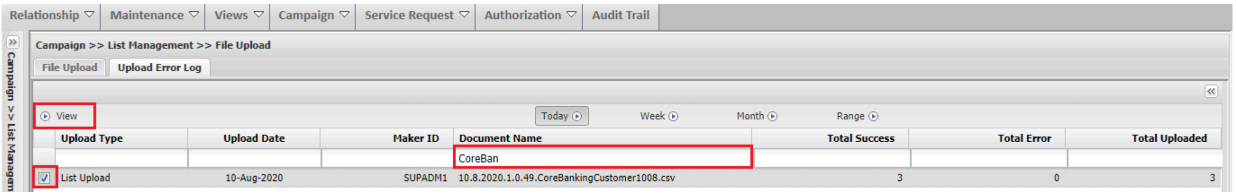
Screen: Upload Error Log Navigation

10.5.11. User views the list of all - files uploaded successfully. The user can check the Total Success, Total Error and Total Uploaded records information for the file uploaded. System allows to filter the records based on uploads done today, week, month and date range



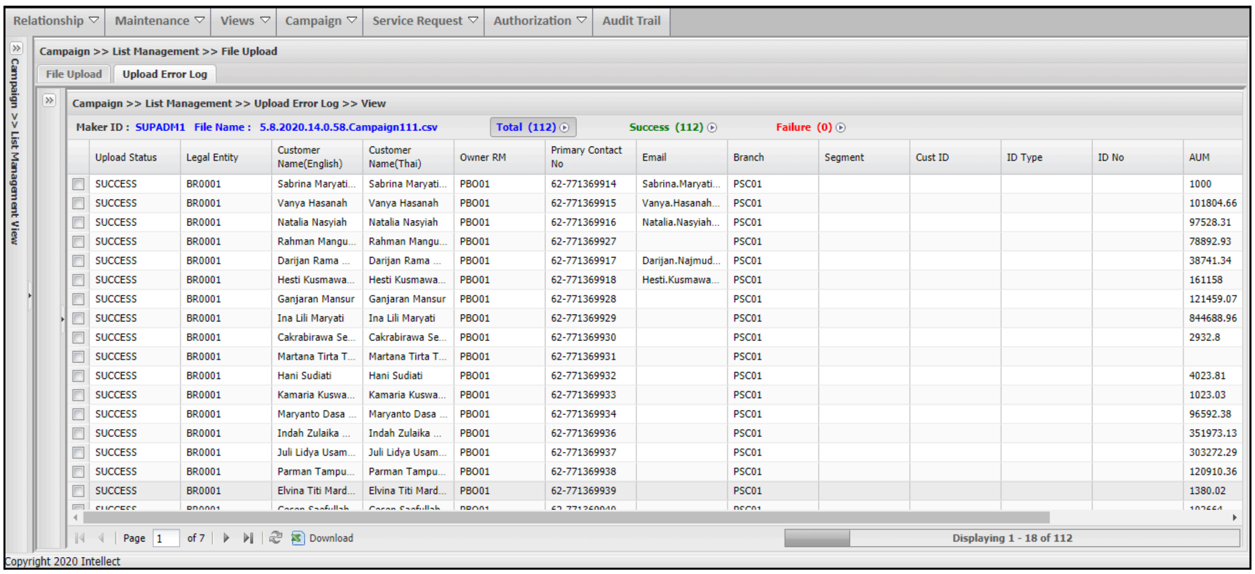
Screen: Upload Error Log Summary

10.5.12. The user can search the file name, selects the record and clicks on "View" to view the detailed summary of the upload result



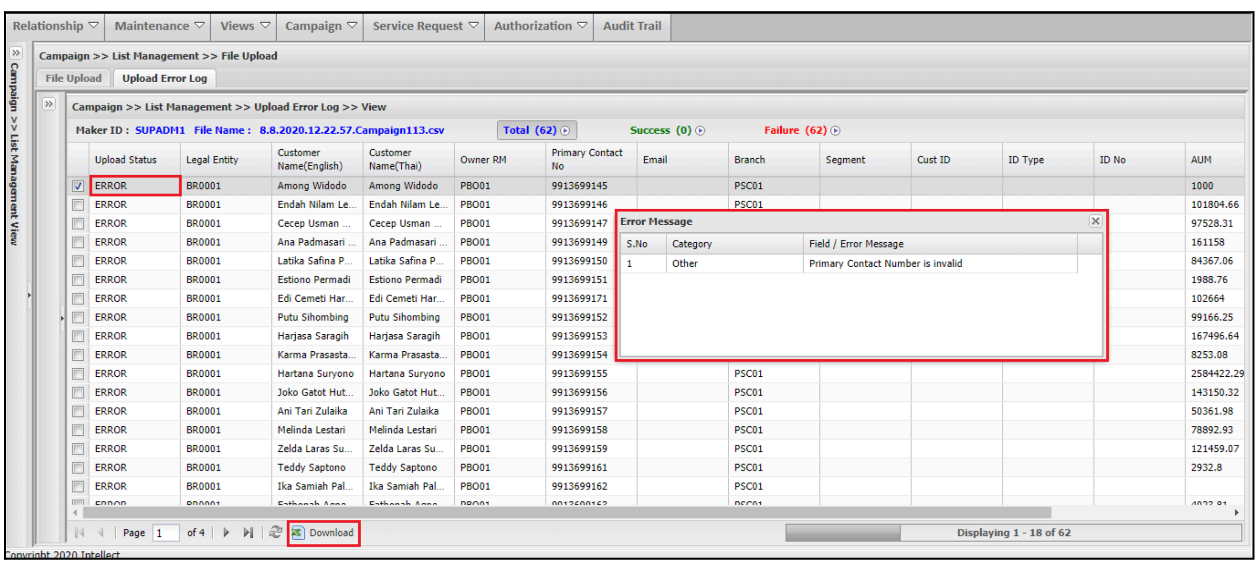
Screen: Select Error Log Record for View

10.5.13. User views the detailed log summary of the uploaded file. The user can further drill down to the record level and check the status (Success/Error) displayed against each record



Screen: View Error Log Detailed Summary

10.5.14. The user can check the reason for error records by clicking on the "Error" status against the error record. All the records can be downloaded in an excel file by clicking on the "Download" button



Screen: View Error Record with Error Details

10.5.15. The user can re-upload the error records again after fixing the error. This will be created as a separate list in the system. All the successfully uploaded can be viewed in the List Management screen

10.6. Annexure

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