Journey of Lead and Campaign Management

HSBC PWS

Document Version History

Date	Prepared By	Reviewer	Approver & Date of Approval	Version	Change Details
20-Sep-23	Mahati Rallabandi	Siddharth Anand		1.0	Base version

Distribution List

Team	Person

Table of Contents

1. Introduction

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

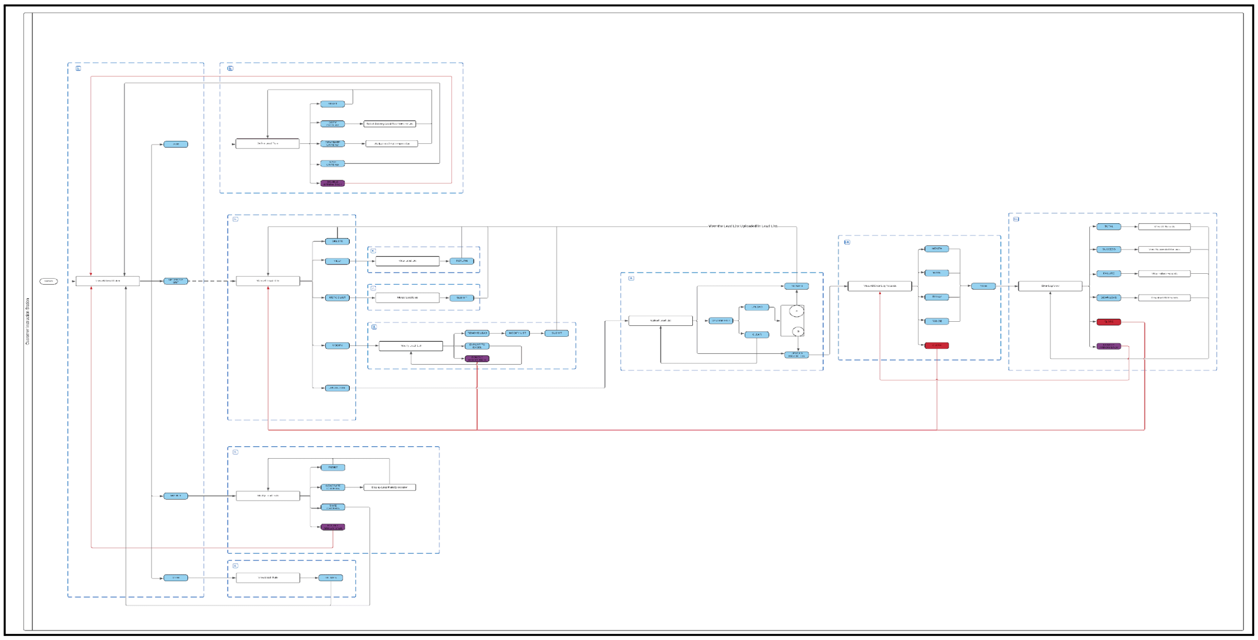
The purpose of this document is to guide the users through the process of creating and managing campaigns, creating and managing a list of intended recipients of the campaign, and recording responses for the underlying campaigns

2. Prerequisites

S No	Process	Reference Document
1	Prospect Management	Journey of Lead to Prospect and Prospect to Customer
2	Customer Management	Journey of Editing Customer Profile
3	Roles and User Maintenance	Journey of Defining Maintenance
4	Filing a Call report	Journey of RM from Customer Meeting to Closure of Action Items
5	Lead Management	Journey of Lead to Prospect and Prospect to Customer

3. Flow Diagram

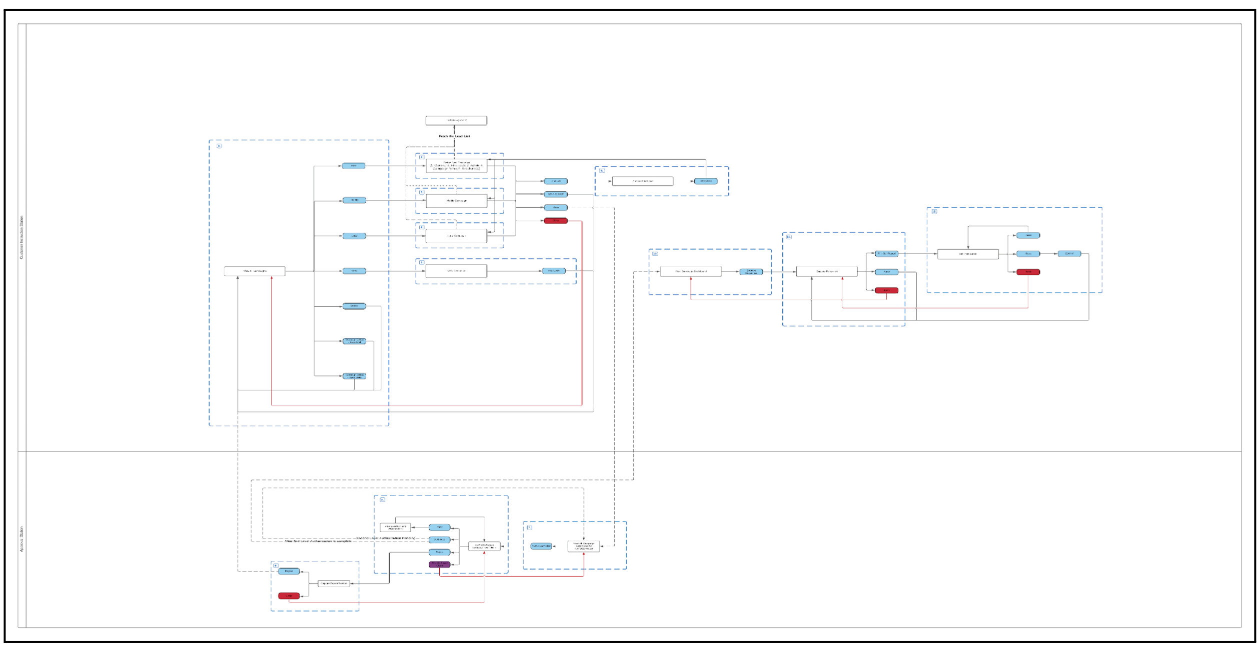
1. The below diagrams reflect the process flow for Lead List Management (refer to Glossary for definitions)



Lead List Management Flow Diagram

Lead List
Management.png

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



Campaign Management Flow Diagram (L4 View)

Campaign Management.png

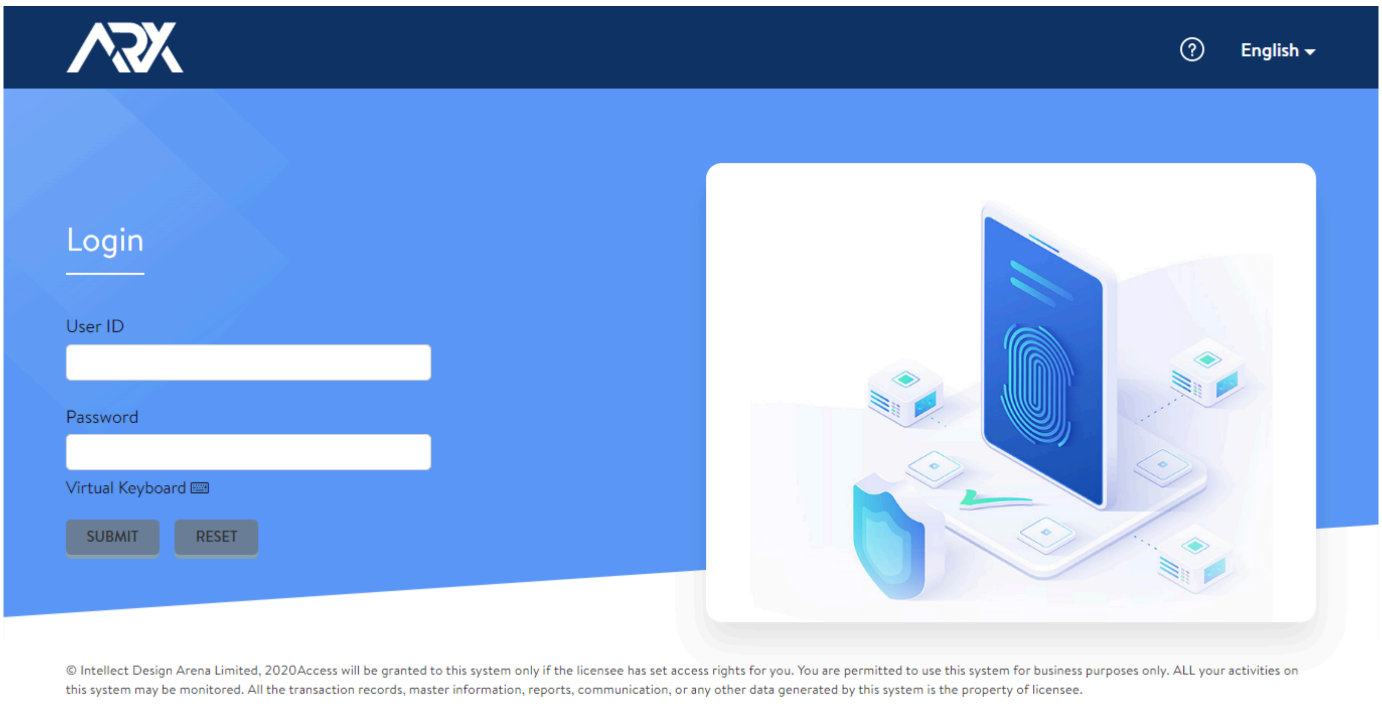
4. Process Description

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

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

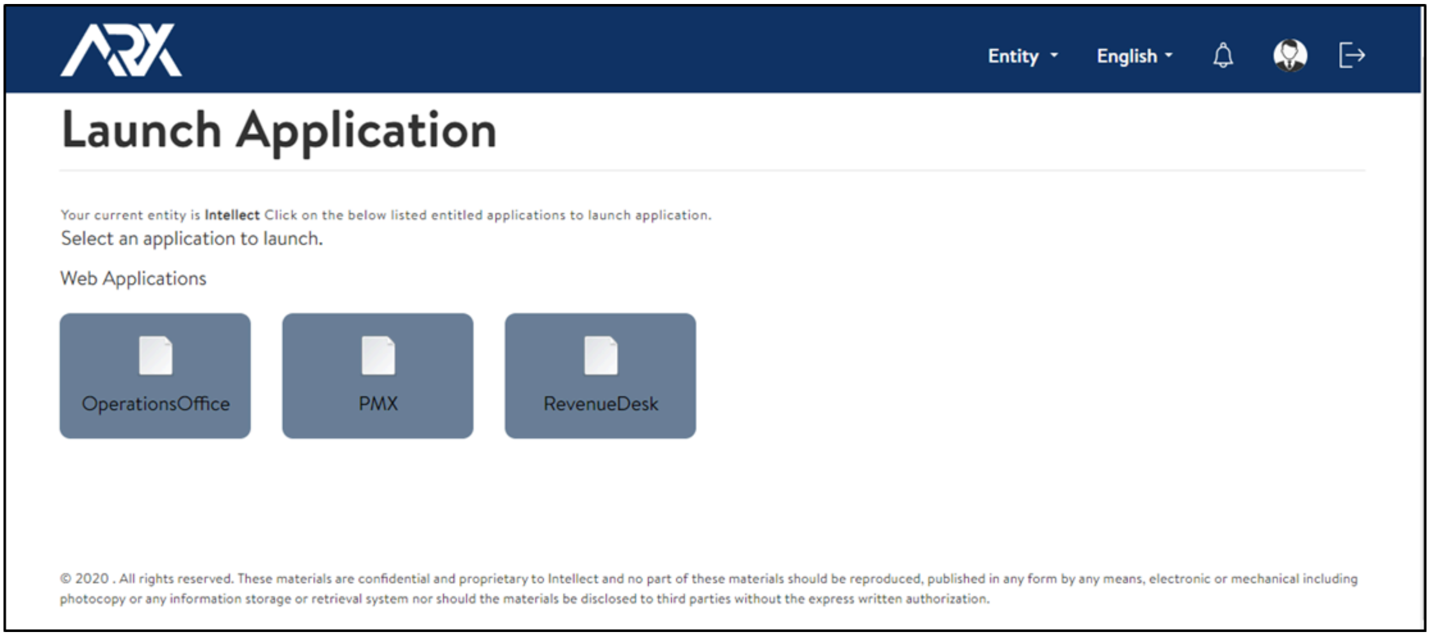
4.1 Login

1 The User enters their credentials and logs into the application



Screen: Launch the application

2 Once logged in, the User clicks on "Operations Office" to launch the application



Screen: Select Operations Office

4.2 Lead List Management

The first step in this journey is identifying 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

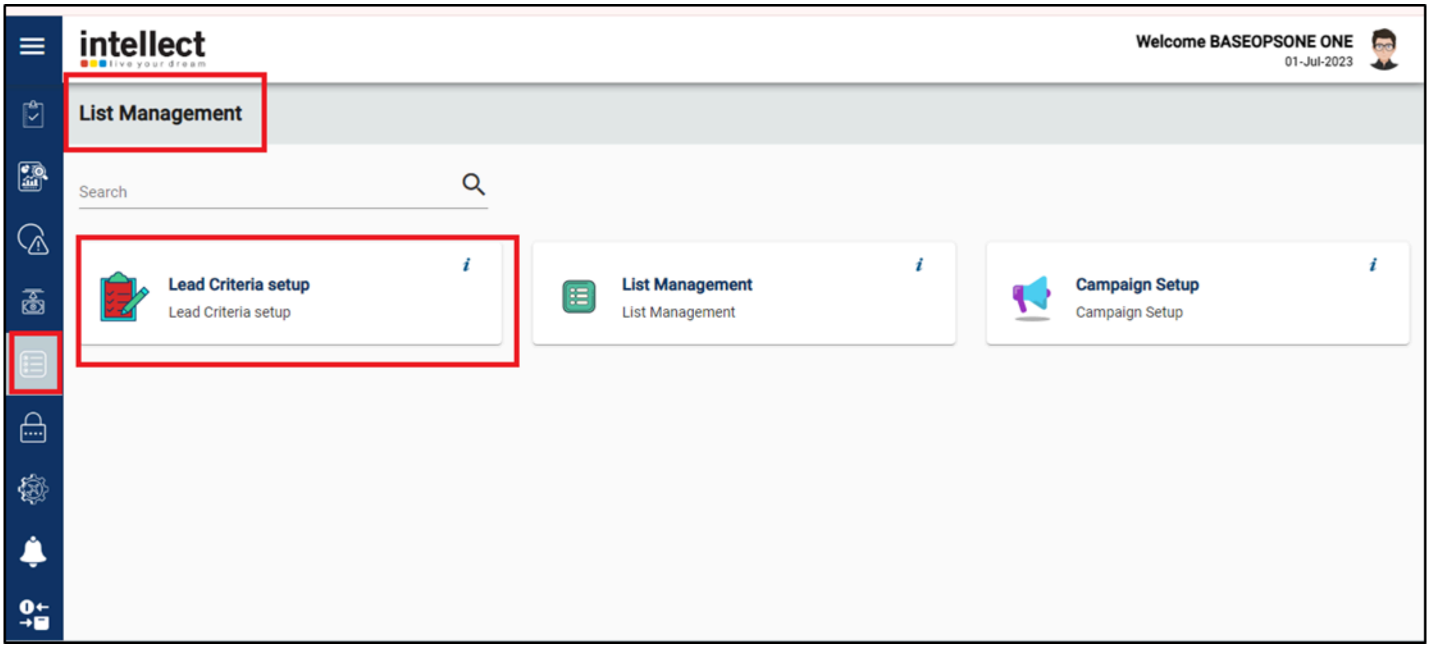
The leads are identified automatically from the existing customers in the wealth system. The user defines the filter criteria in Rule Definition and as per the filter criteria defined; the system displays the filtered customer records

4.2.1.1 View All Lead Rules

Lead Criteria 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. The user can view all the existing lead rules already created. The user can perform the following actions in Lead Rule:

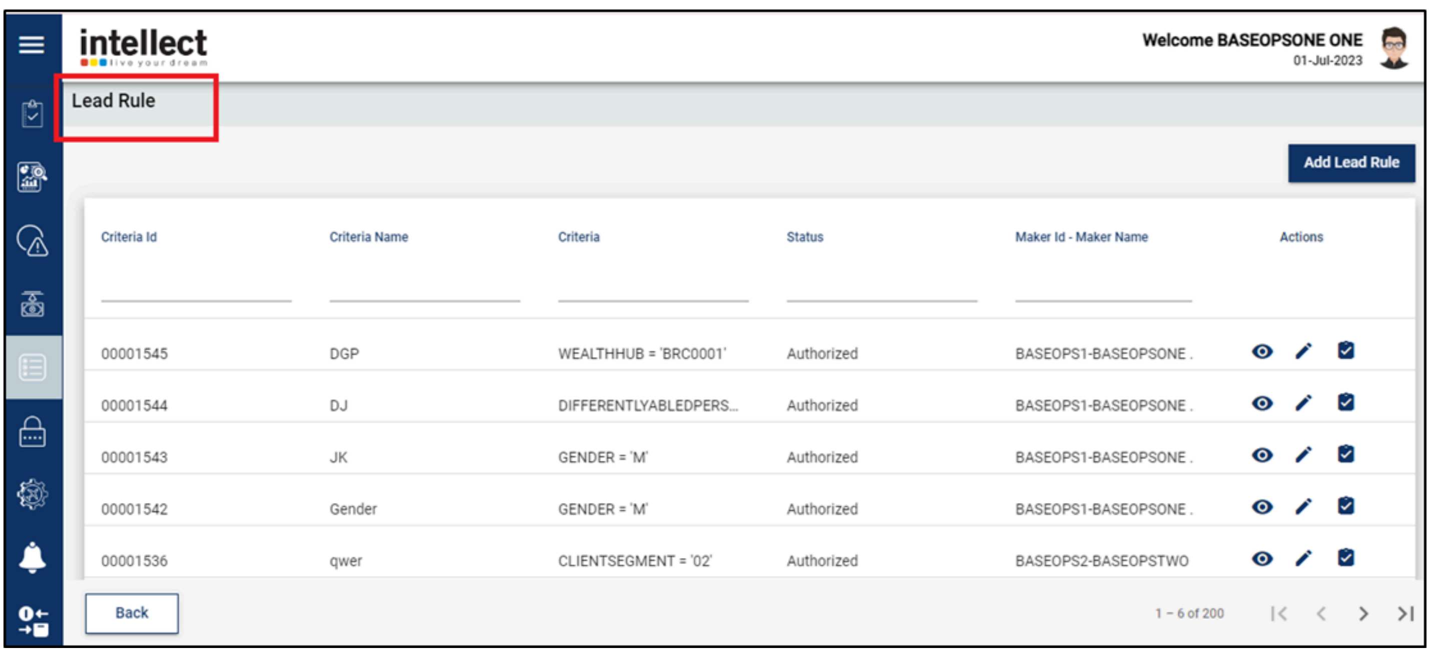
1. Add Lead Rule
2. Modify an existing Lead Rule
3. View an existing Lead Rule
4. Generate List

1. The user clicks on the “List Management” from the left sidebar menu and then clicks on the “Lead Criteria Setup” sub-menu.



Screen: Lead Rule Screen Navigation

2. User views the lead rules defined in the system

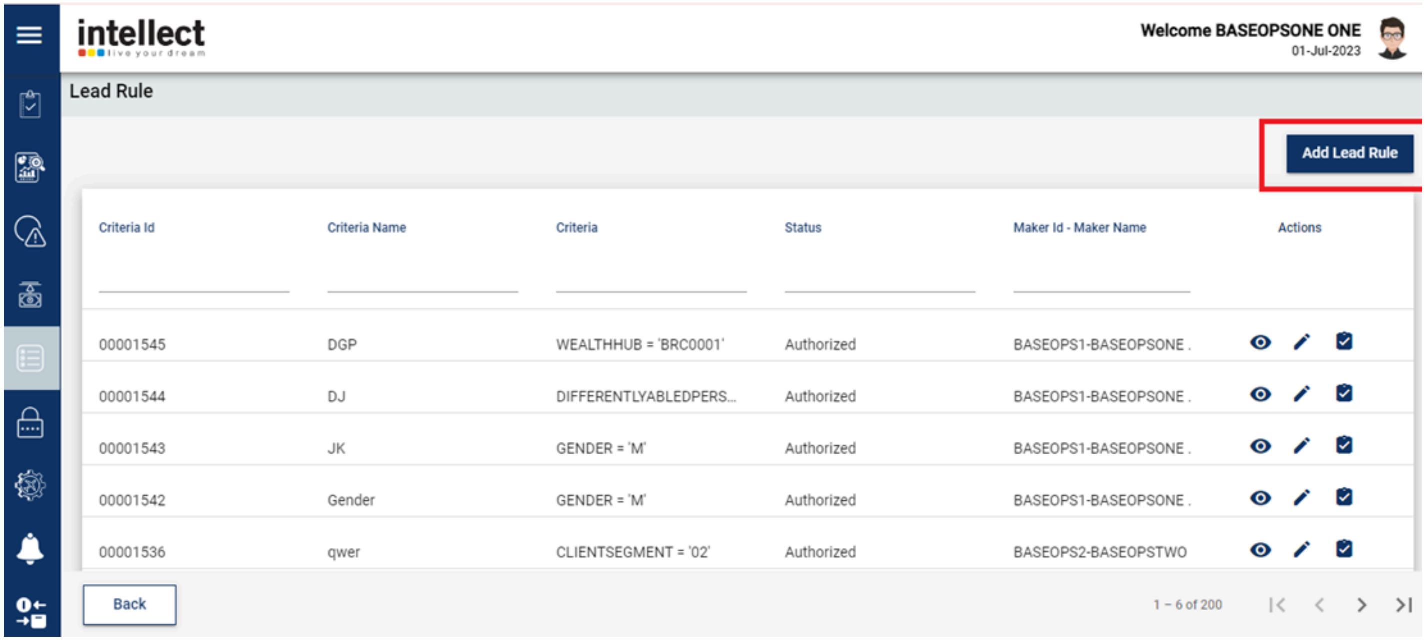


Screen: View All Lead Rules

4.2.1.2 Add Lead Rule

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

1. The user clicks on “Add” to add a new lead rule



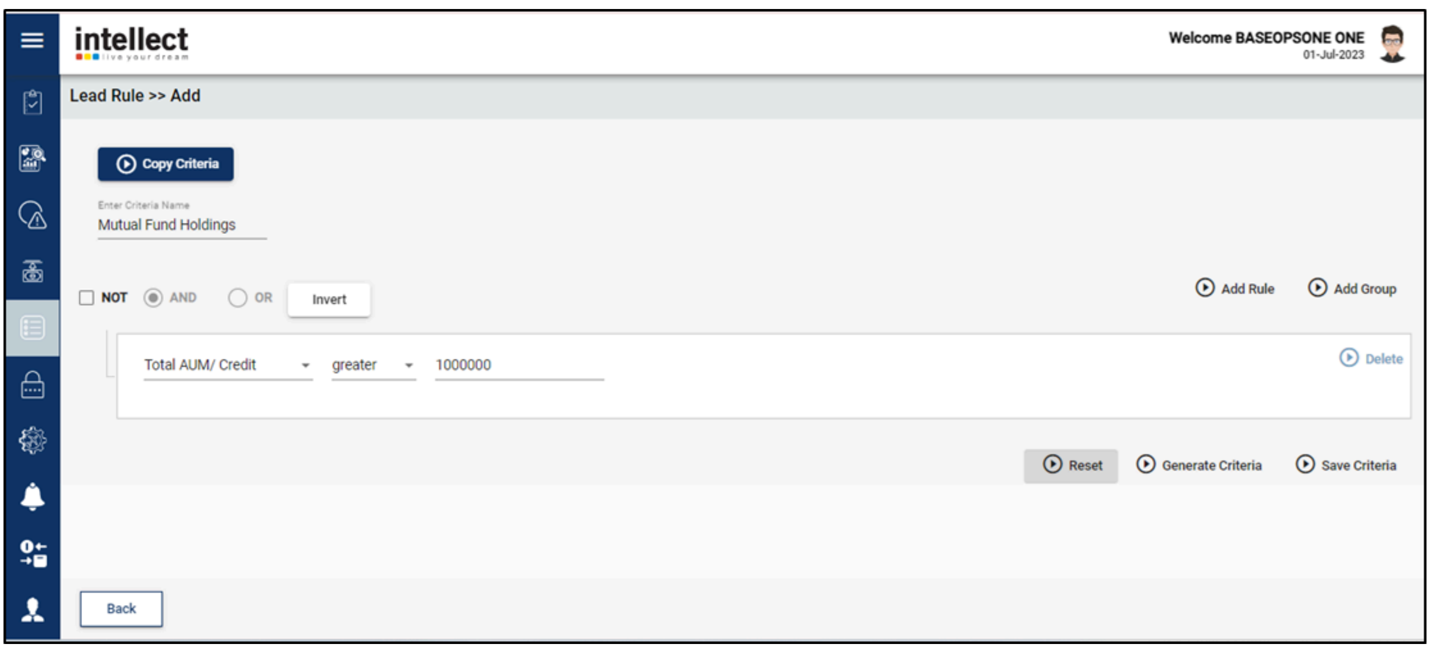
Screen: Define Lead Rule Screen Navigation

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

Screen: Define Lead Rule- Enter Criteria Name

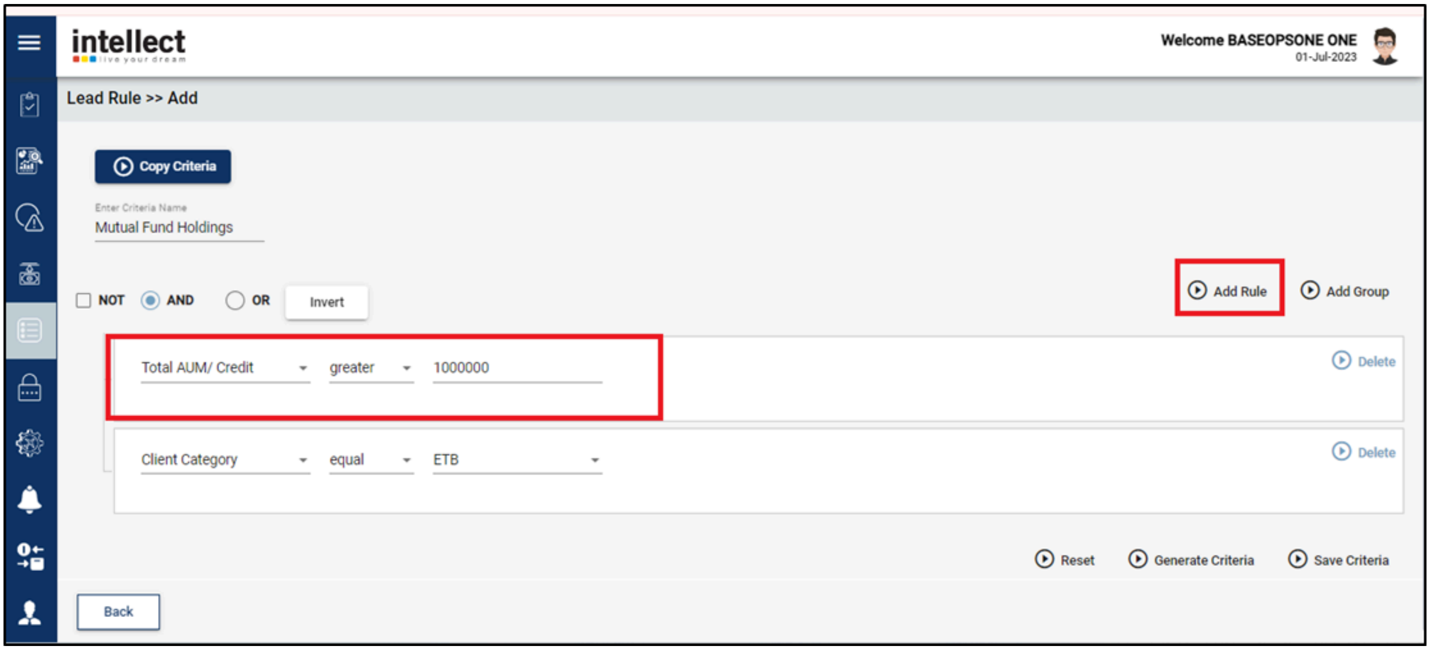
Screen: Define Lead Rule - View List of Criteria

3. They then select the criteria from the dropdown list, the mathematical operation, and the criteria value. In the below example (Criteria - Total AUM/Credit, Mathematical Operation - Greater, Criteria Value - 10,00,000)



Screen: Lead Rule Criteria

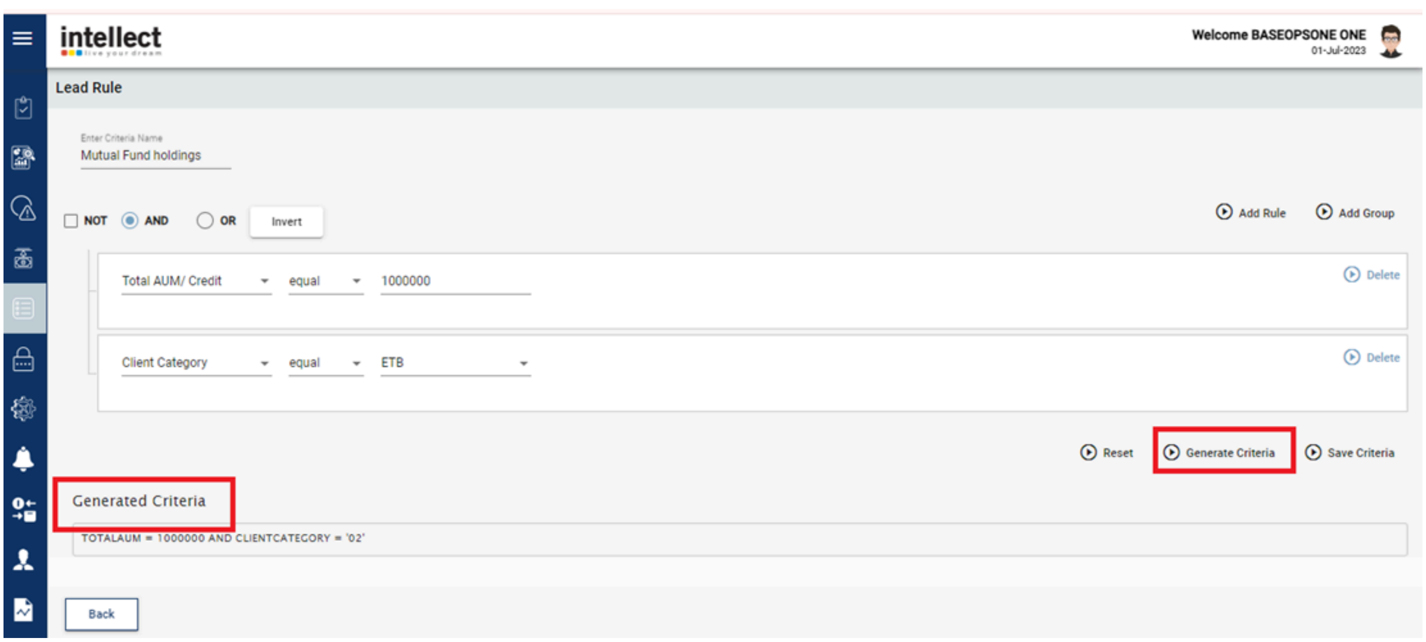
a. Users can add rules to the existing rule present by clicking on the "Add Rule". The below example has two criteria:
   i. Client Category is equal to ETB (Existing to Bank)
   ii. Total AUM/Credit greater than 10,00,000 INR



Screen: Lead Rule Criteria

b. Users can join the single criteria with a 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"

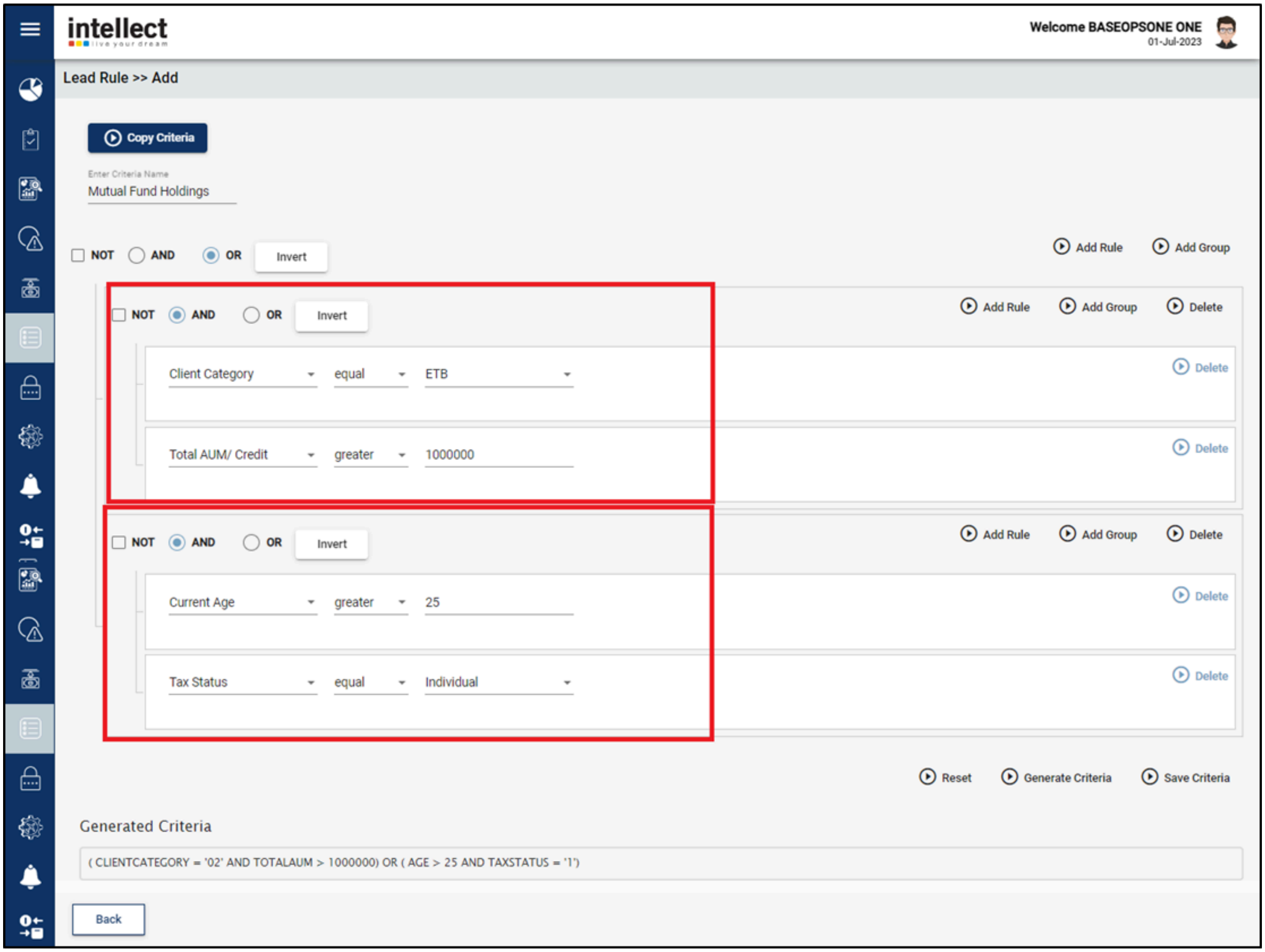
   i. Client Category is equal to ETB (AND) Total AUM/Credit greater than 10,00,000 INR



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 - criteria joined with the "OR" logical operator

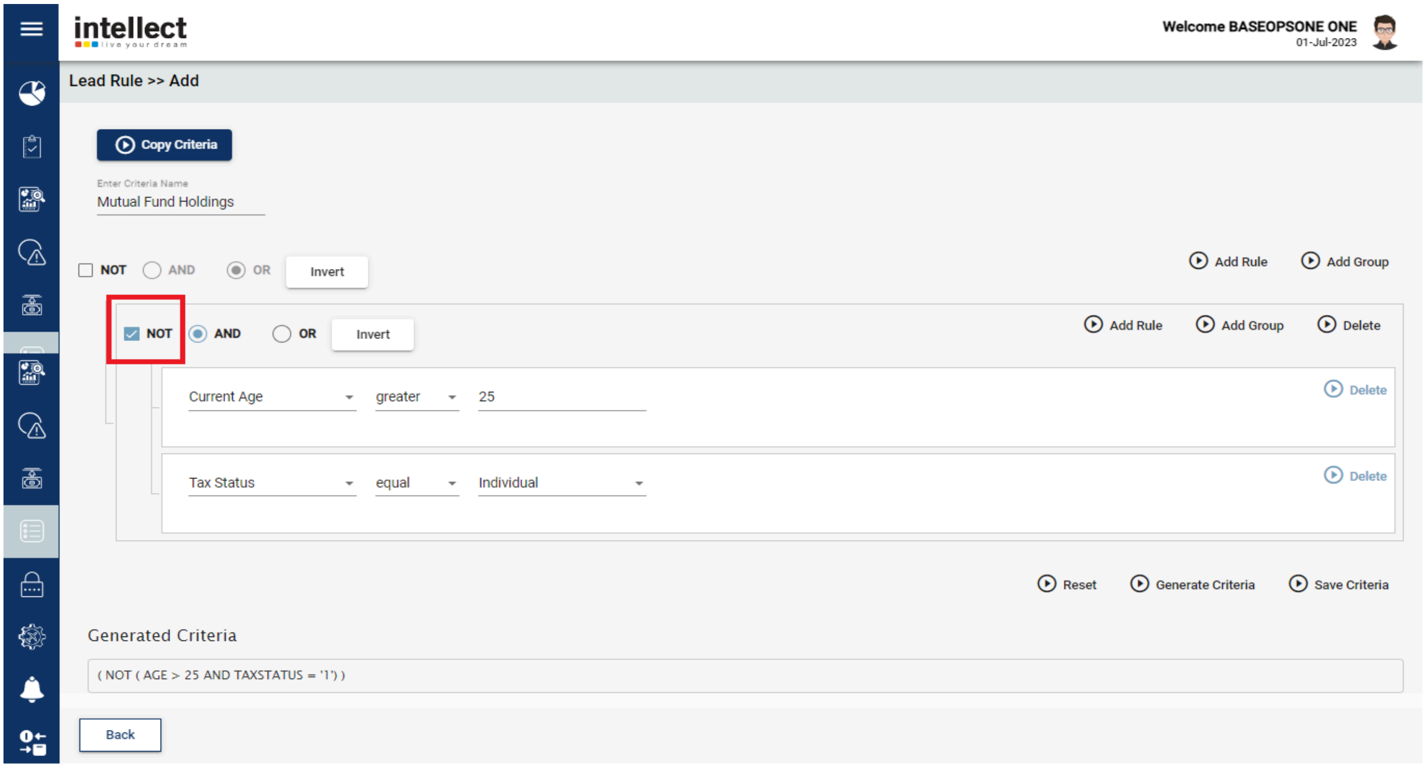
   i. (Client Category is equal to ETB (AND) Total AUM/Credit greater than 10,00,000 INR**) OR** (Age greater than 25 (AND) Tax Status is equal to Individual)



Screen: Lead Rule Criteria

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

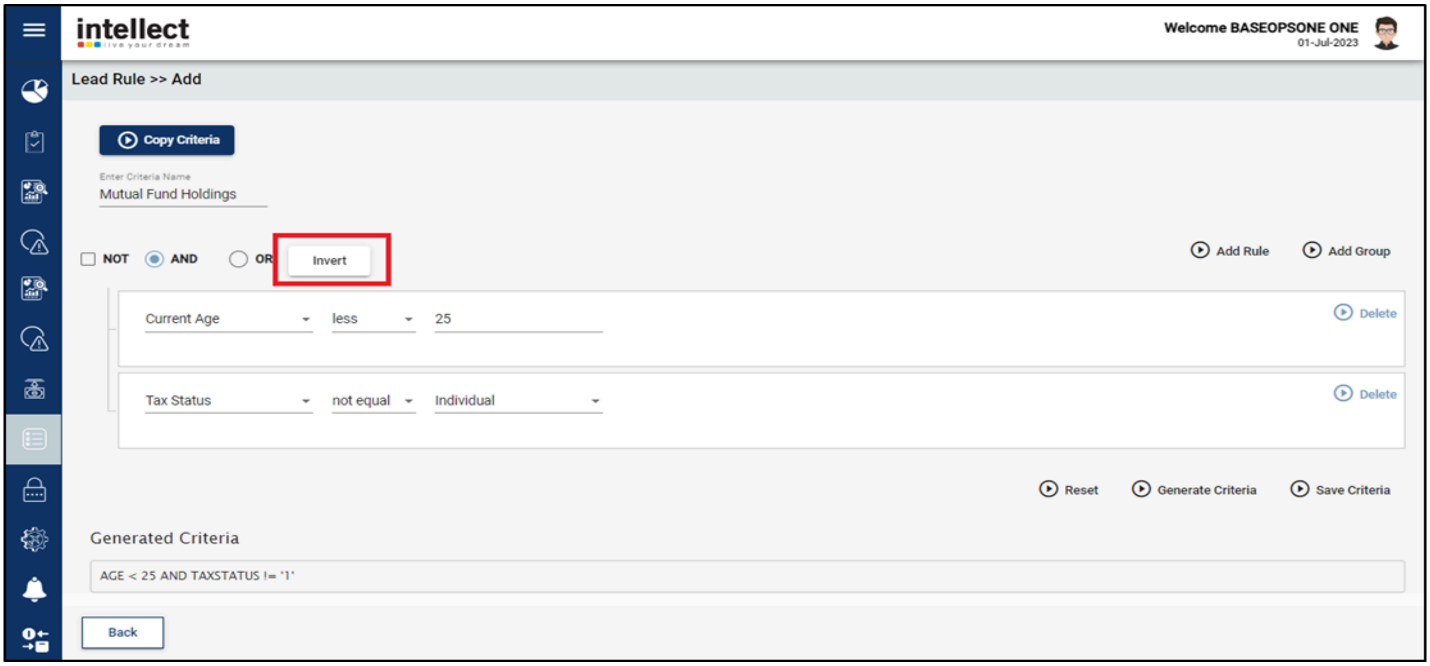
   i. NOT (Age greater than 25 (AND) Tax Status is Individual)



Screen: Lead Rule Criteria

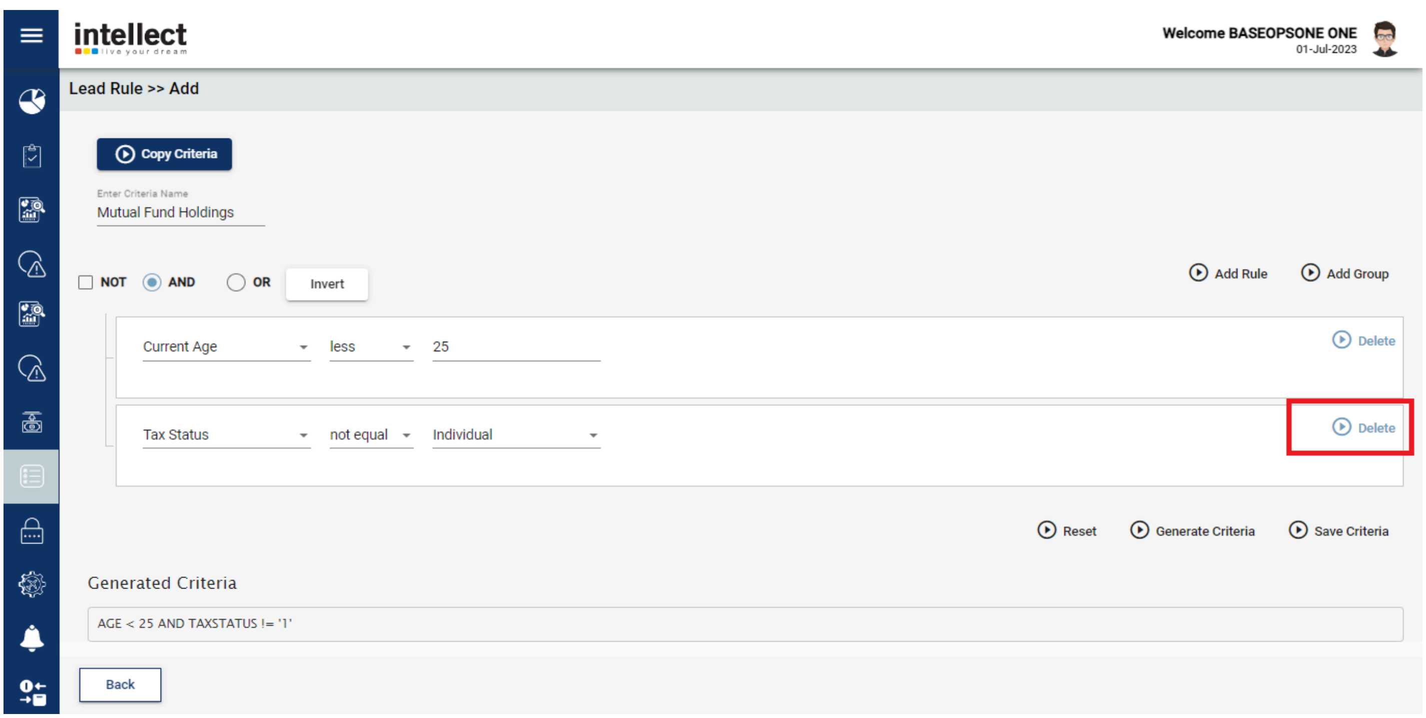
e. Users can inverse the mathematical operators used for the criteria by clicking on "Invert". The below example can be inverted

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



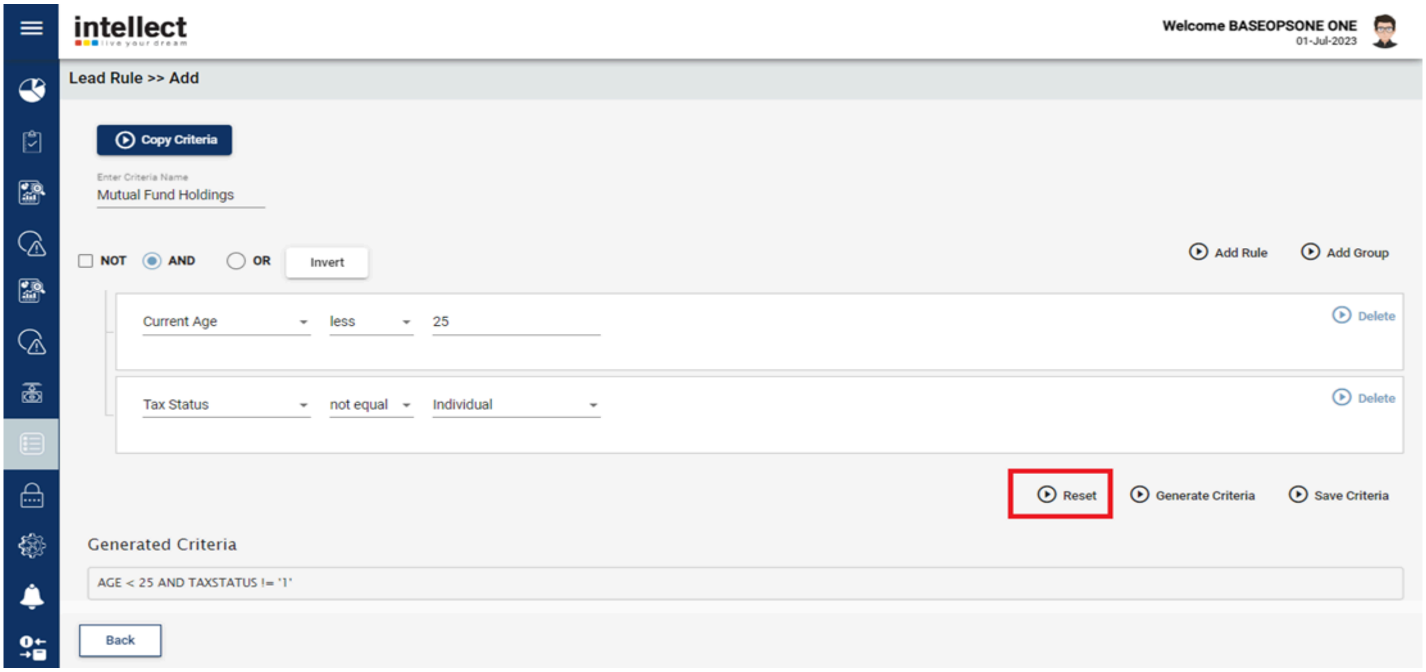
Screen: Invert Lead Rule Criteria

f. Users can delete the criteria by clicking on "Delete". In the below example, tax status criteria can be deleted
   i. (Age less than equal to 25 (AND) Tax Status is Individual) to (Age less than or equal to 25)



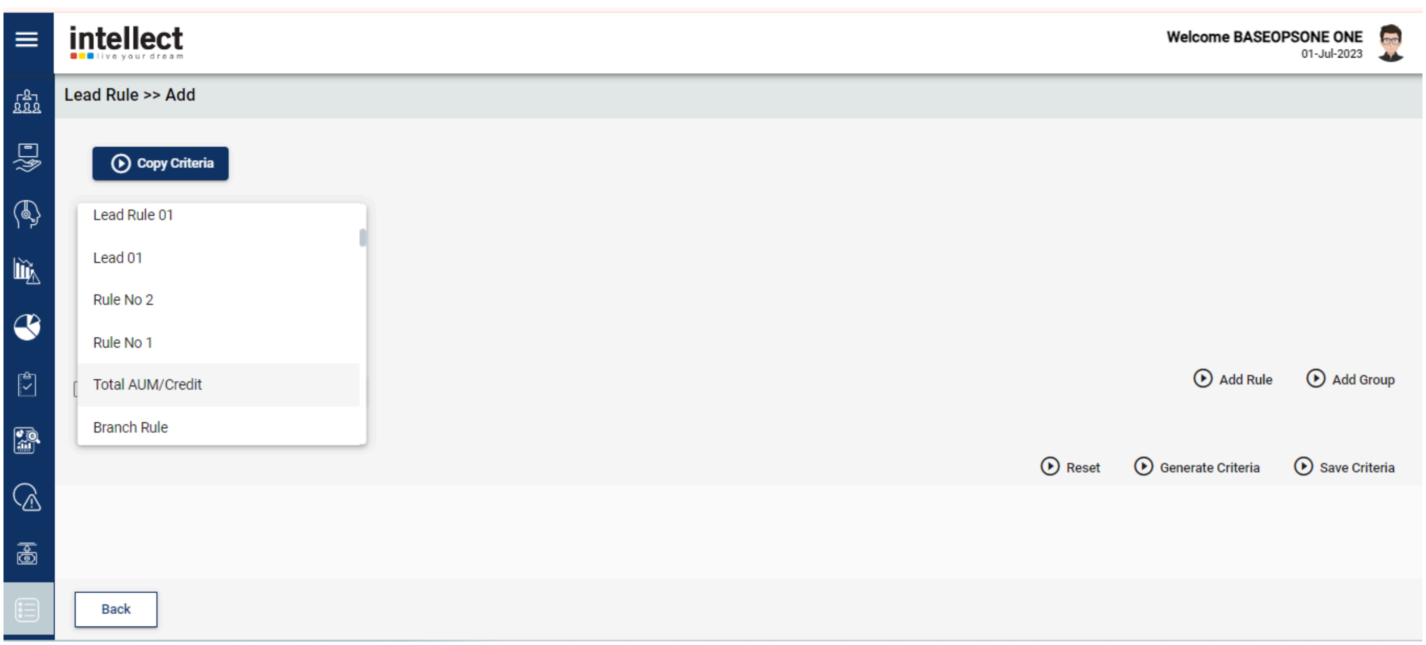
Screen: Delete Lead Rule Criteria

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



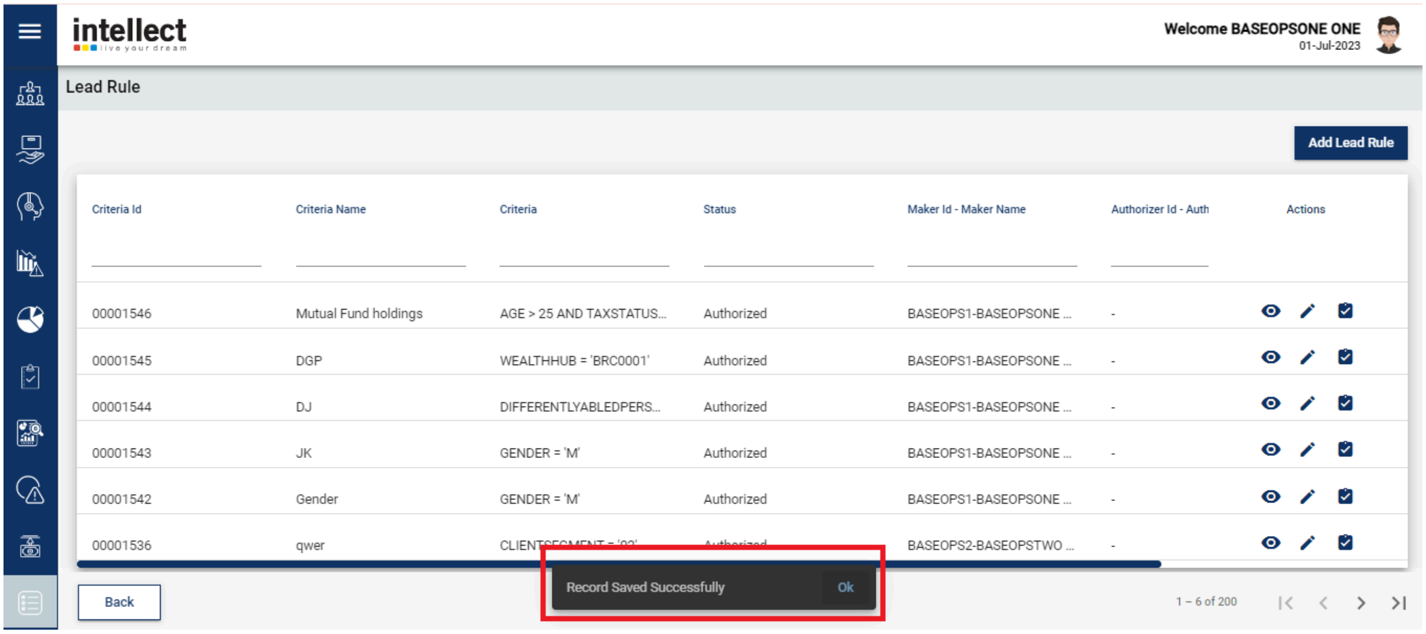
Screen: Reset Criteria

h. 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



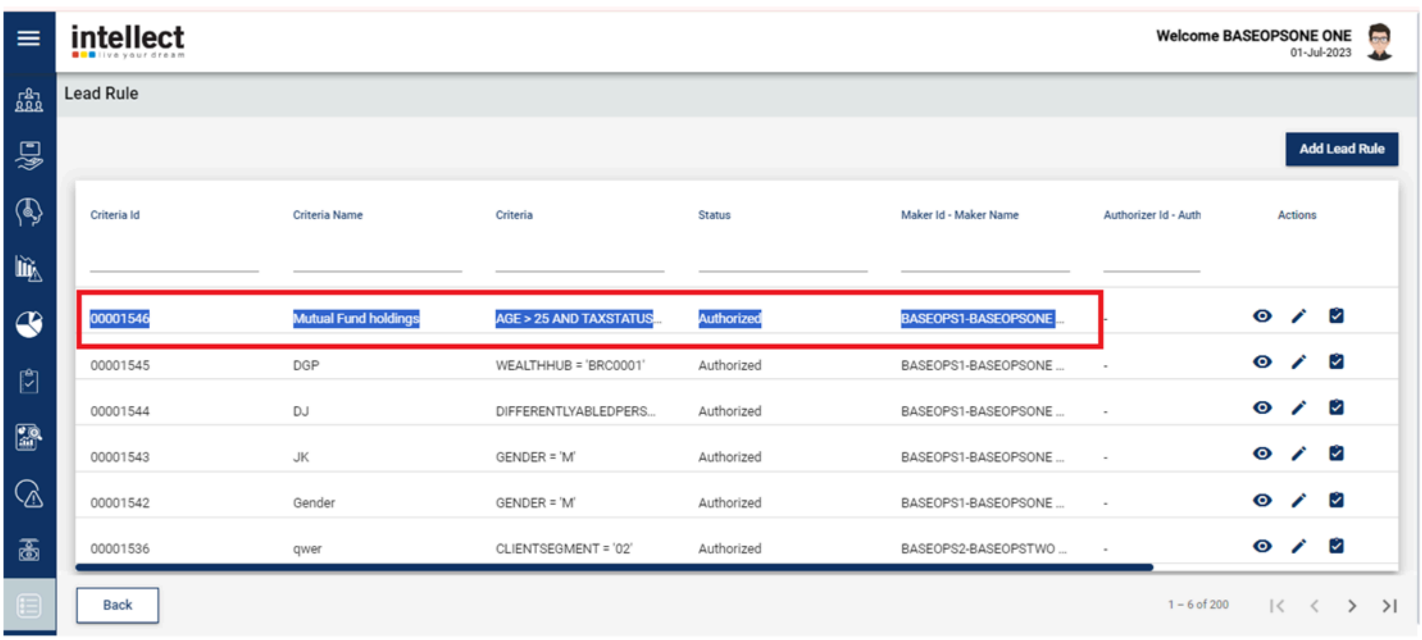
Screen: Copy Criteria

i. The user creates the criteria using the above-mentioned steps and clicks on "Save Criteria" to save the lead rule



Screen: Save Lead Rule Criteria

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

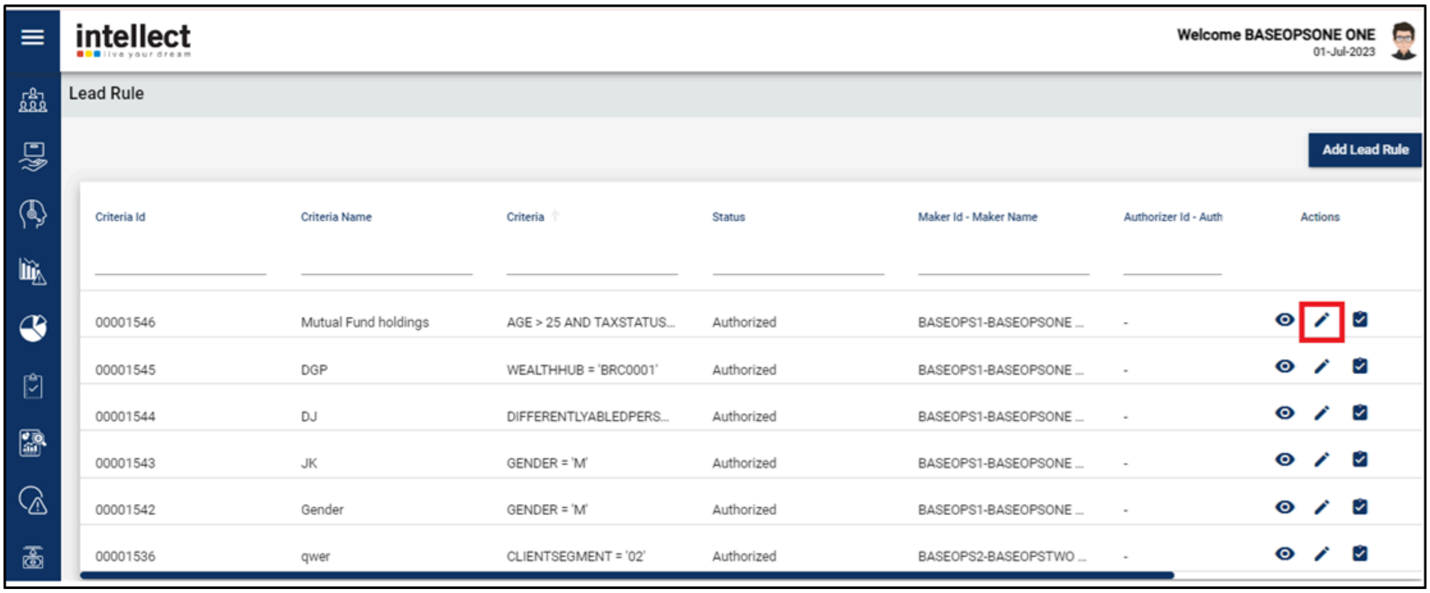


Screen: View Lead Rule Criteria Record

4.2.1.3 Modify Lead Rule

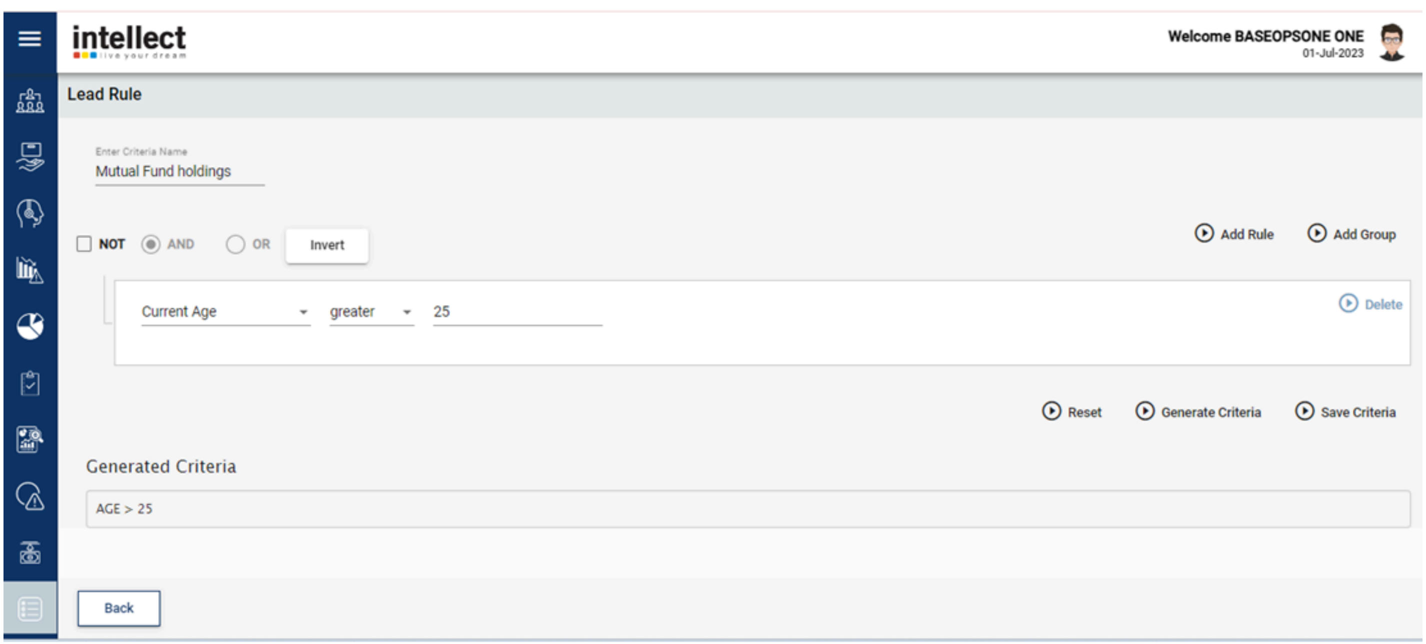
The Lead Rule criteria added can be modified and saved

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



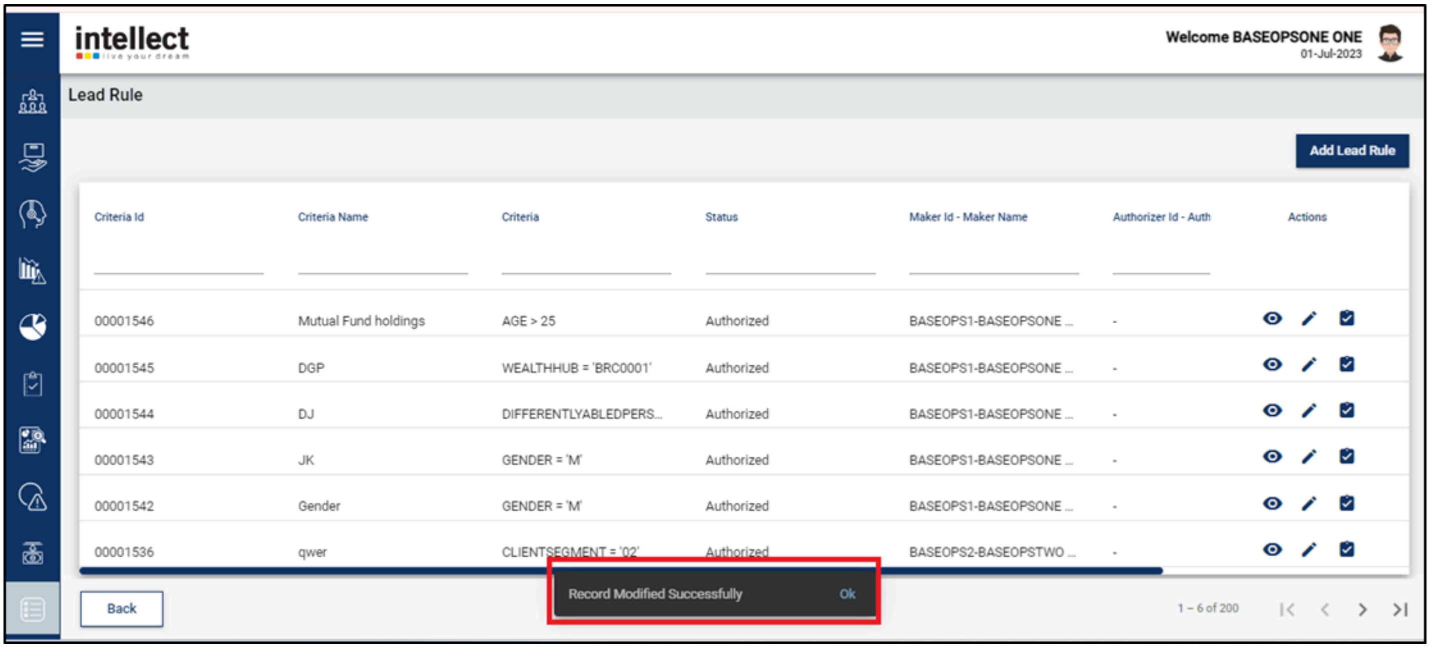
Screen: Select Lead Rule Criteria Record for Modification

2. User modifies the criteria



Screen: Modify Lead Rule Criteria

3. The user clicks on the “Save Criteria” button to save the modified lead rule

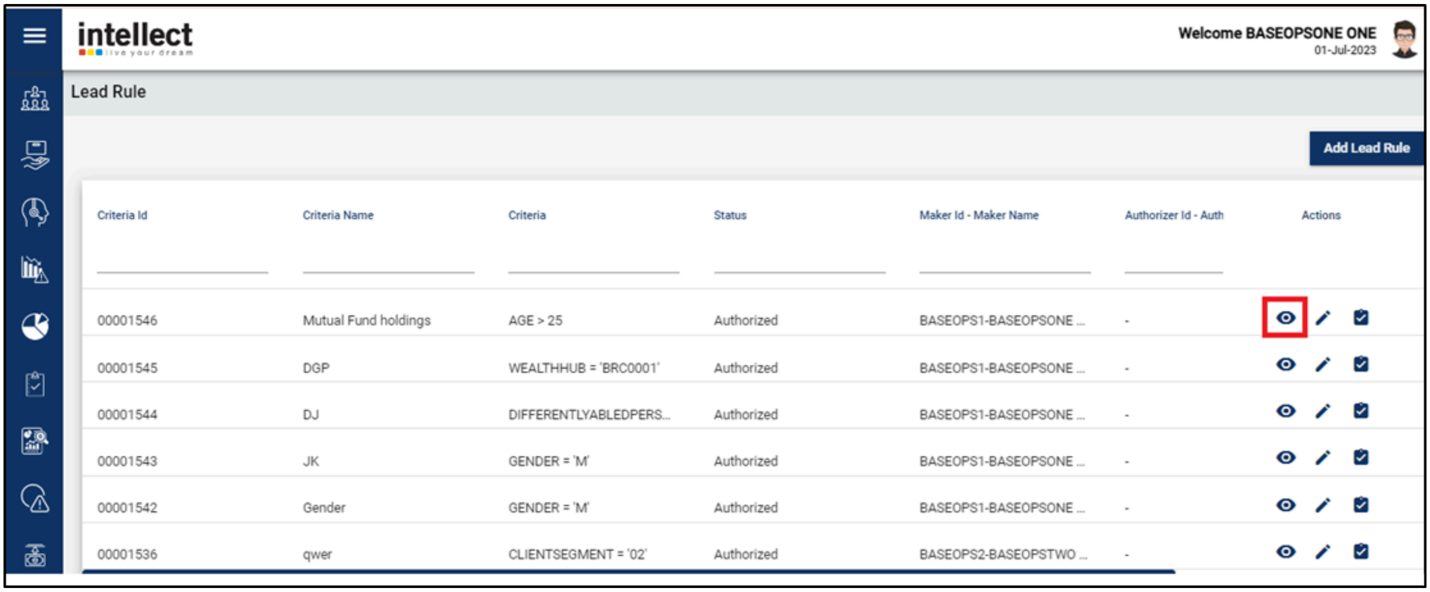


Screen: Criteria Modified Successfully

4.2.1.4 View Lead Rule

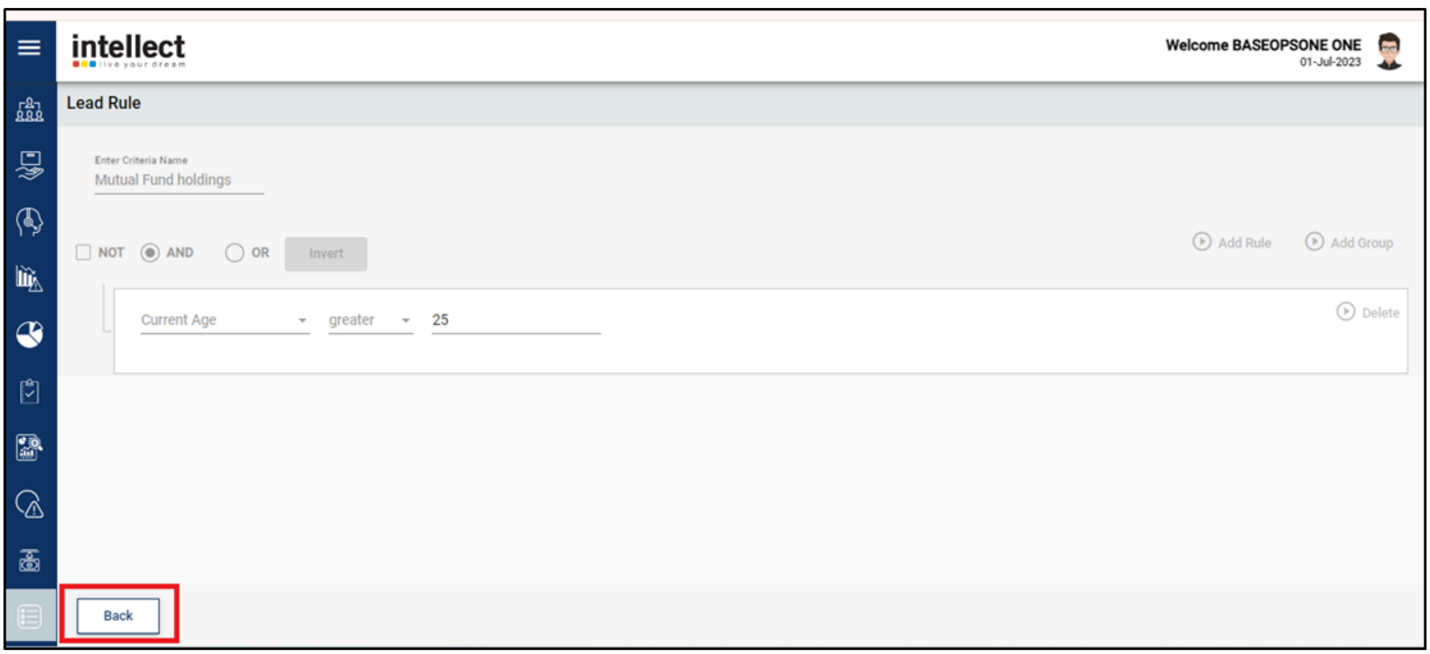
The Lead Rule criteria can be viewed

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



Screen: Select Lead Rule Criteria Record for View

2. User views the criteria and clicks on the Back button to return to the "View All Lead Rules" screen

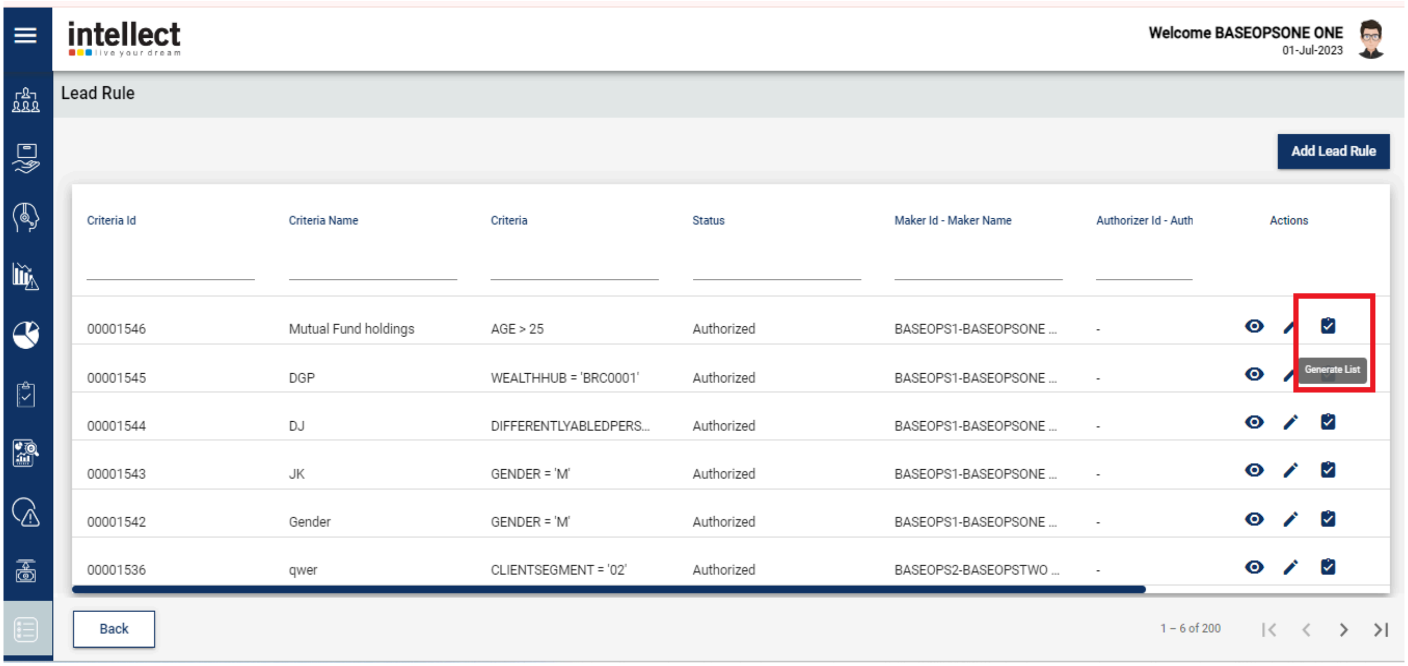


Screen: View Lead Rule Criteria

4.2.1.5 Generate List

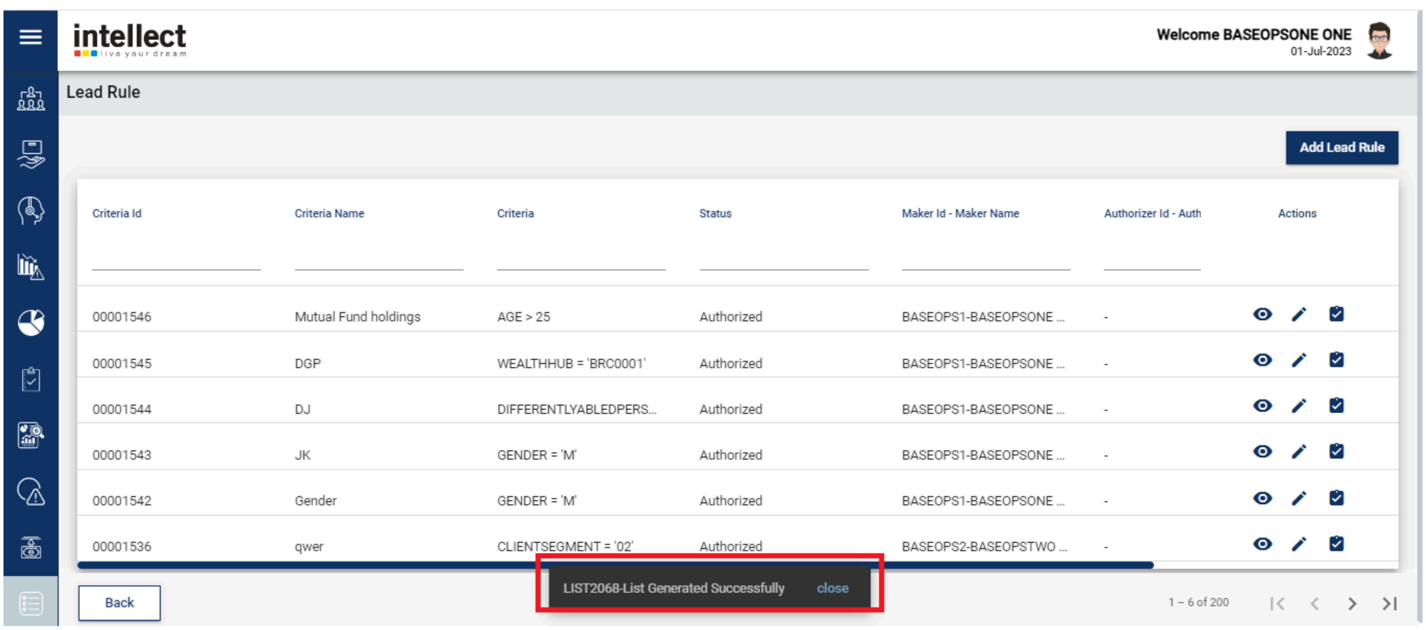
The list of customers satisfying the lead rule criteria can be generated using "Generate List"

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 List Management)



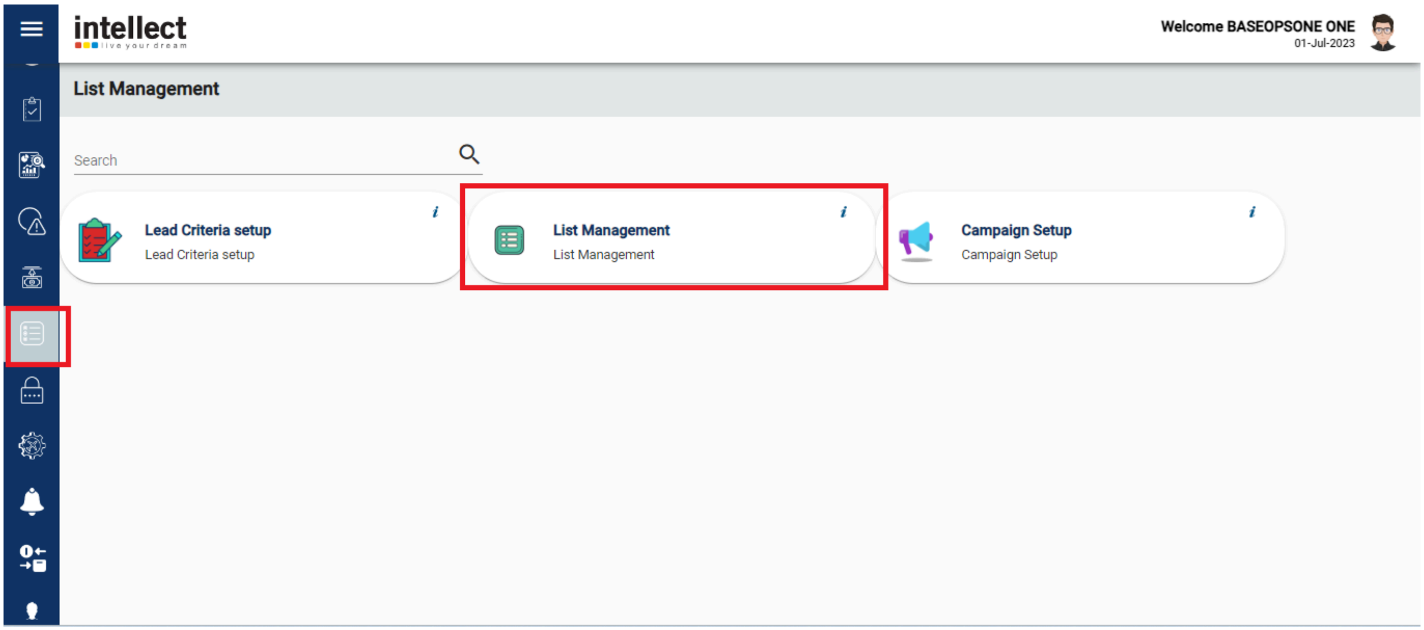
Screen: Generate Lead List for Lead Rule

4.2.2 Lead Upload

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

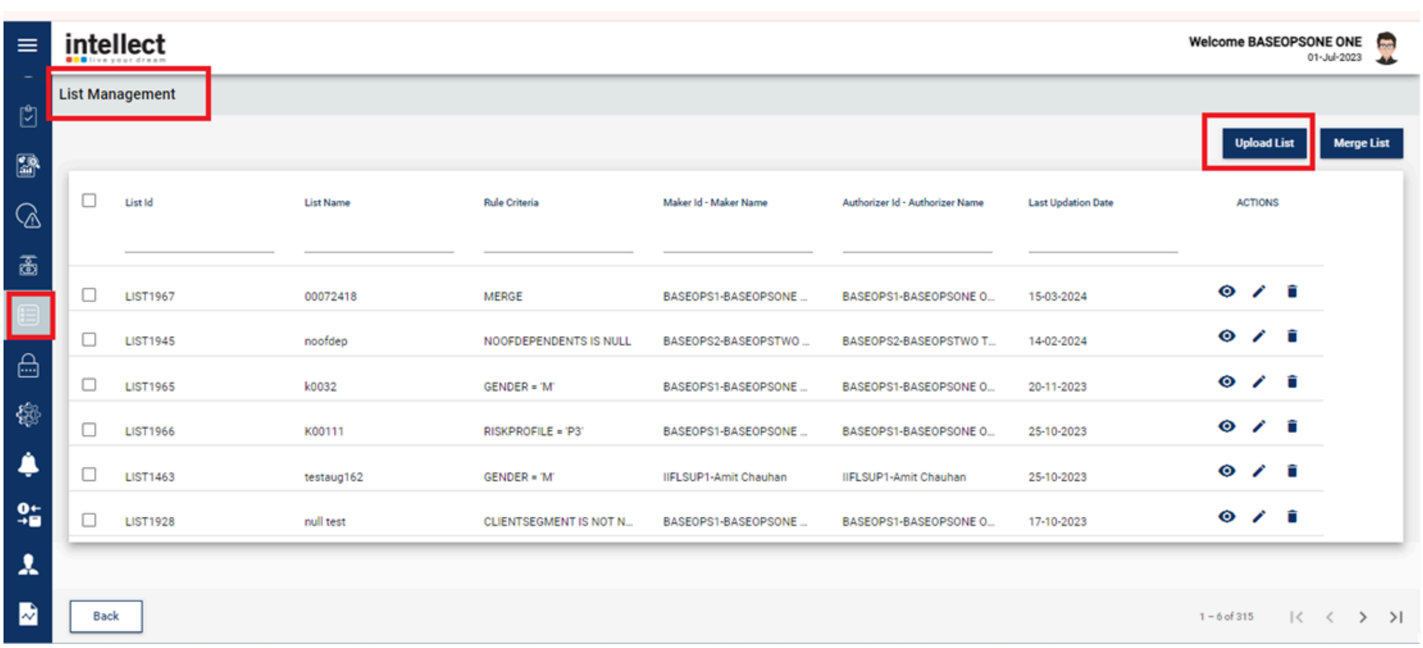
4.2.2.1 Upload Lead List

1. The User clicks on “List Management ” from the left sidebar menu and selects the “List Management” sub-menu



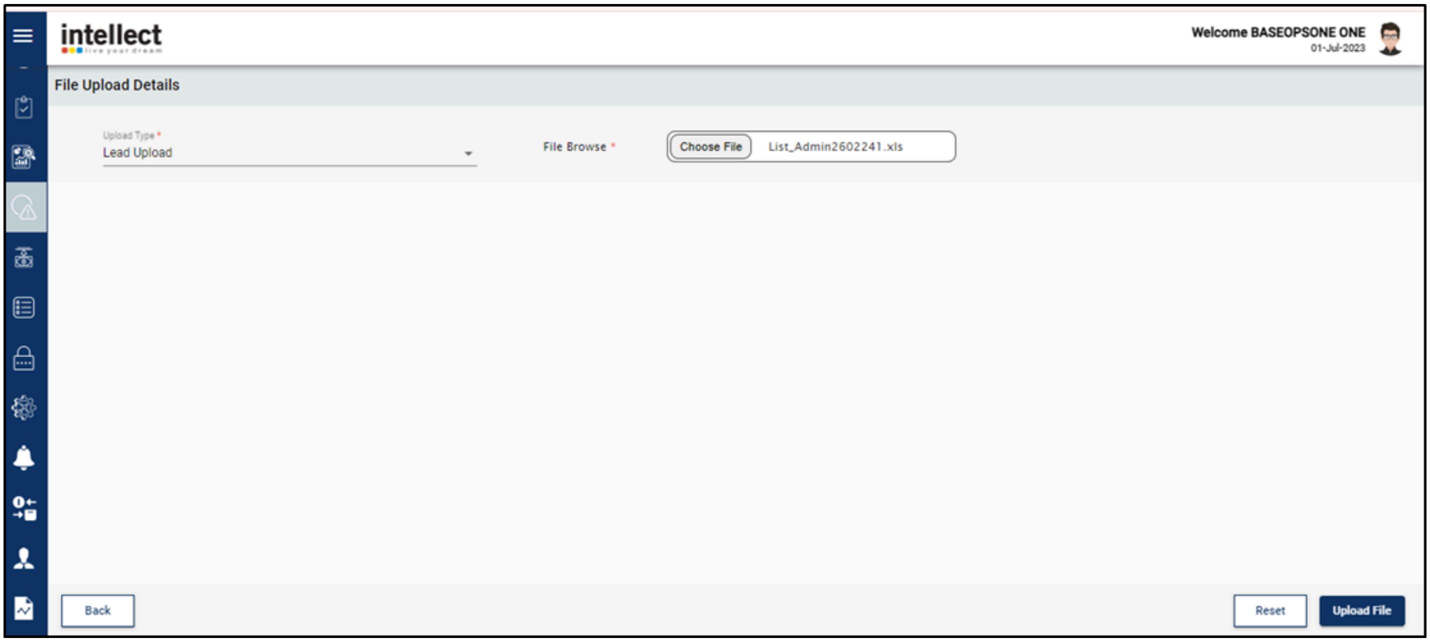
Screen: Upload Lead List Navigation

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



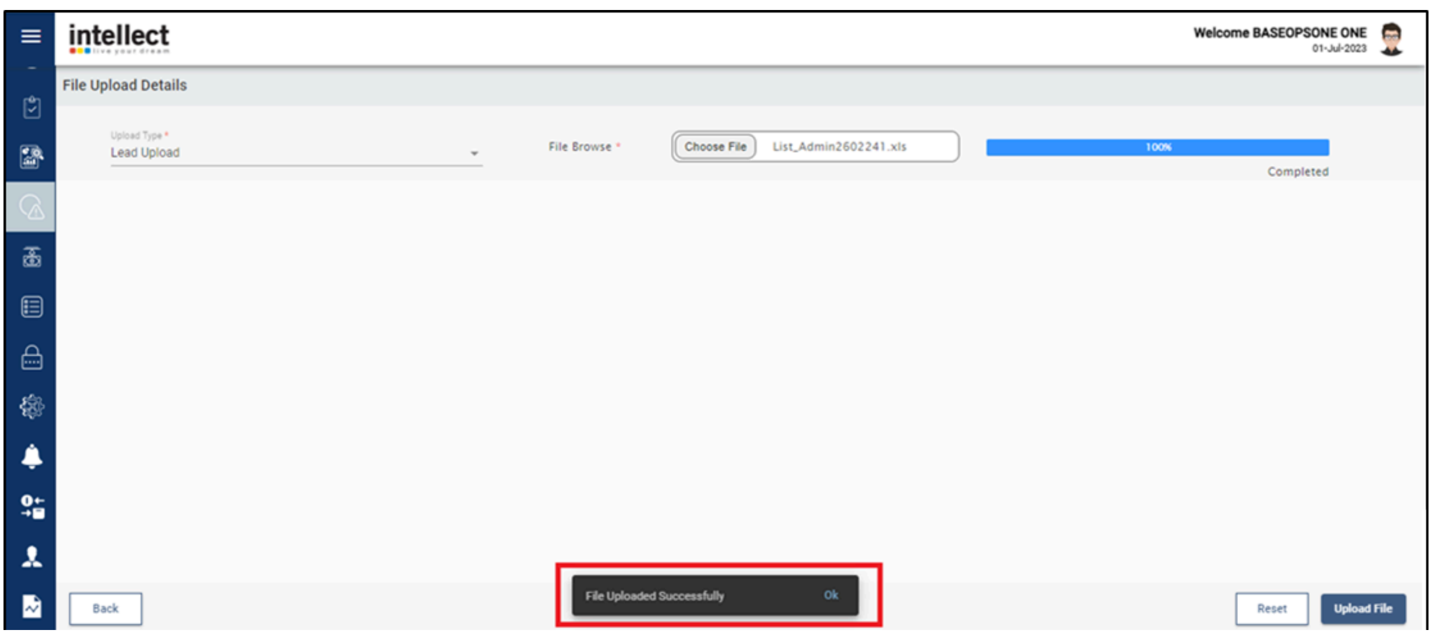
Screen: Upload Lead List Navigation - Upload Lead List

3. User selects “List/Lead Upload” from the dropdown in the Upload Type field and clicks on “Choose File” to select the lead list file (.xls) to be uploaded



Screen: Choose Lead List for Upload

4. User clicks on the “Upload” button to upload the list



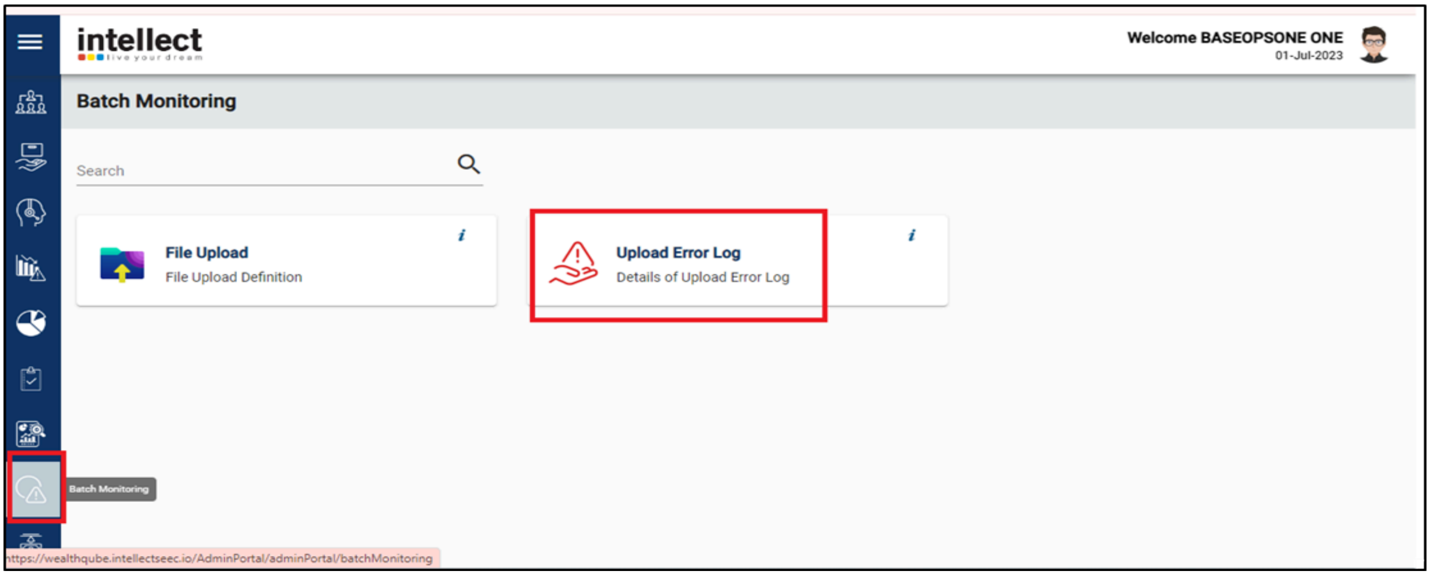
Screen: Lead List –Uploaded

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

4.2.2.2 Review Upload Result - View All Error Log Records

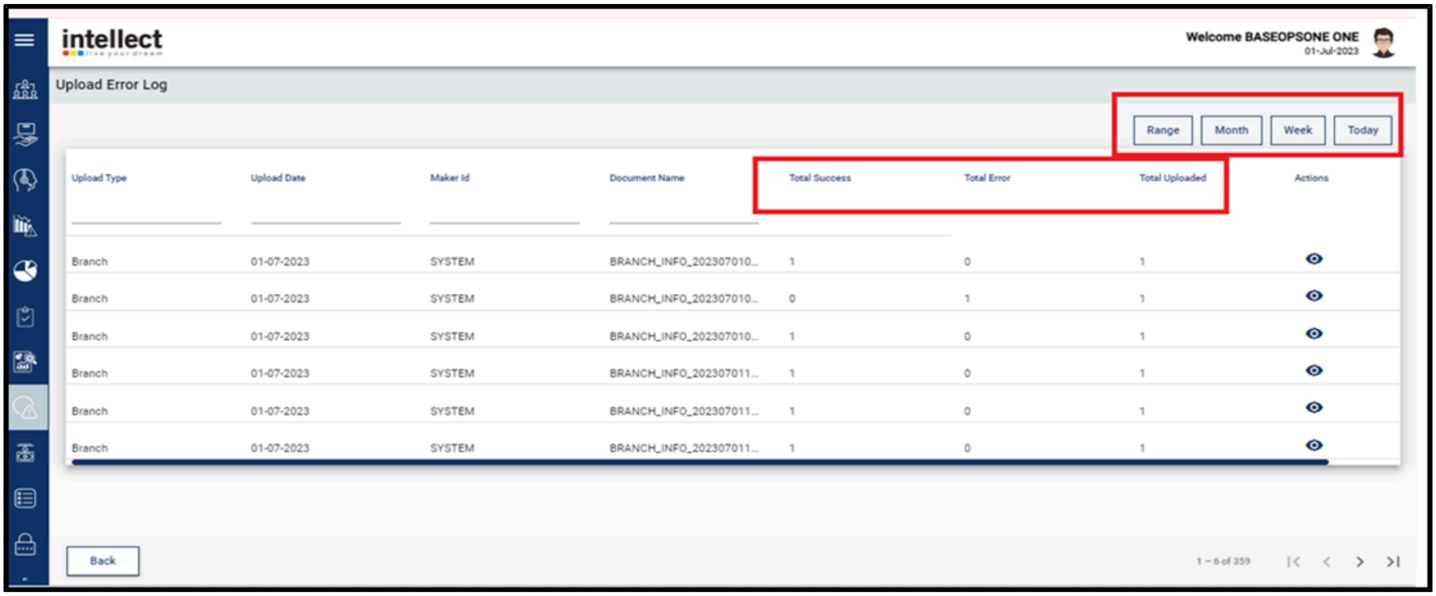
After the upload, the system displays the result of the same in Upload Error Log

1. The user clicks on “Batch Monitoring” on the left sidebar menu and then clicks on the “Upload Error Log” submenu to view the result of the upload



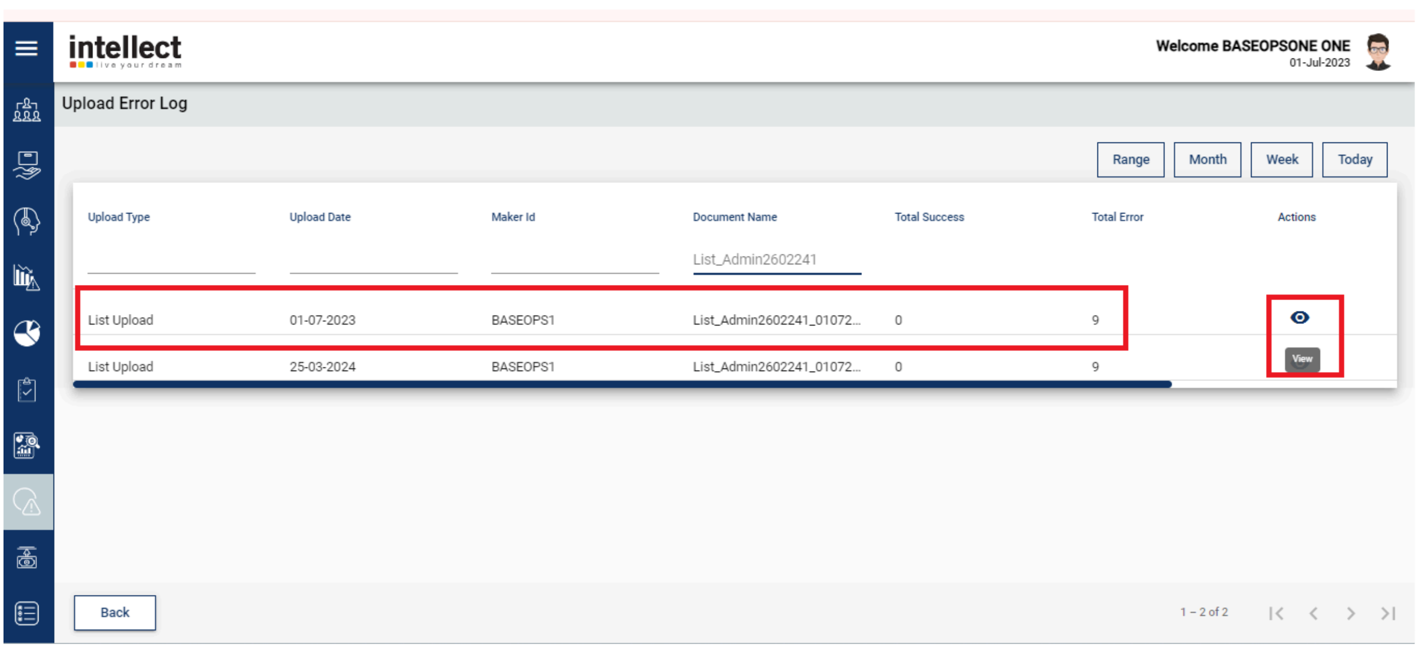
Screen: Upload Error Log Navigation

2. The 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. The system allows to filter the records based on uploads done today, week, month, and a specified date range



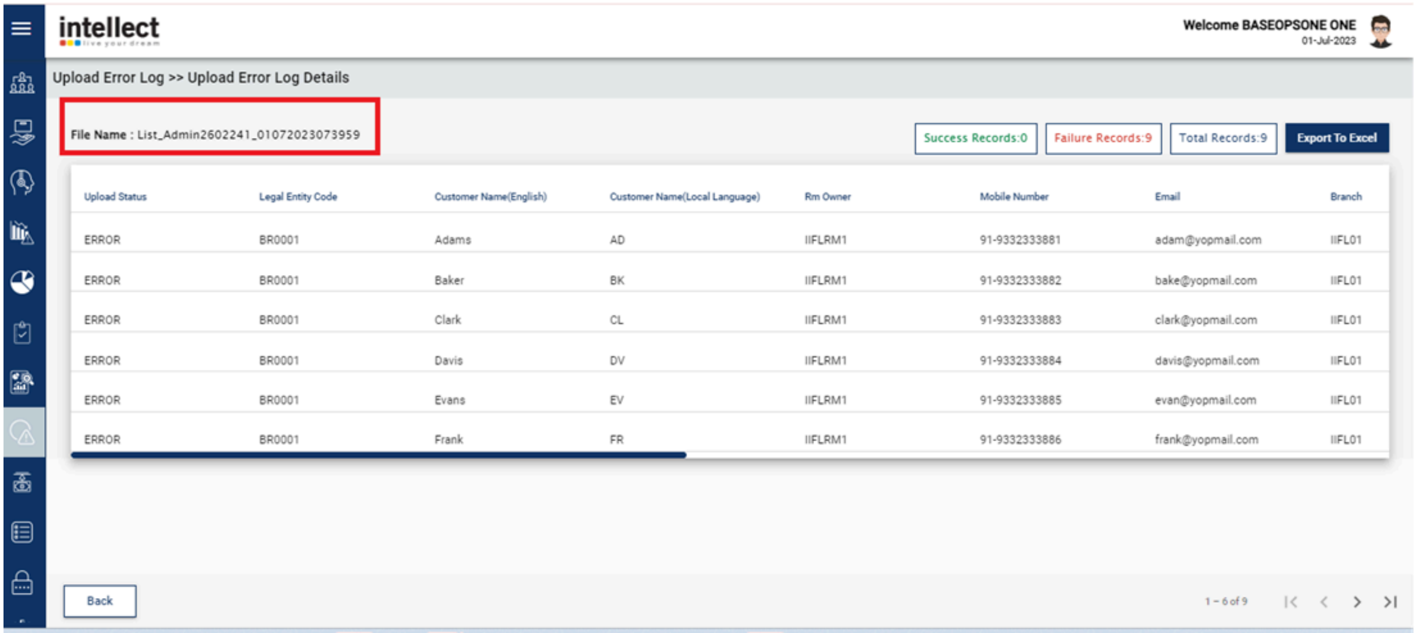
Screen: Upload Error Log Summary

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



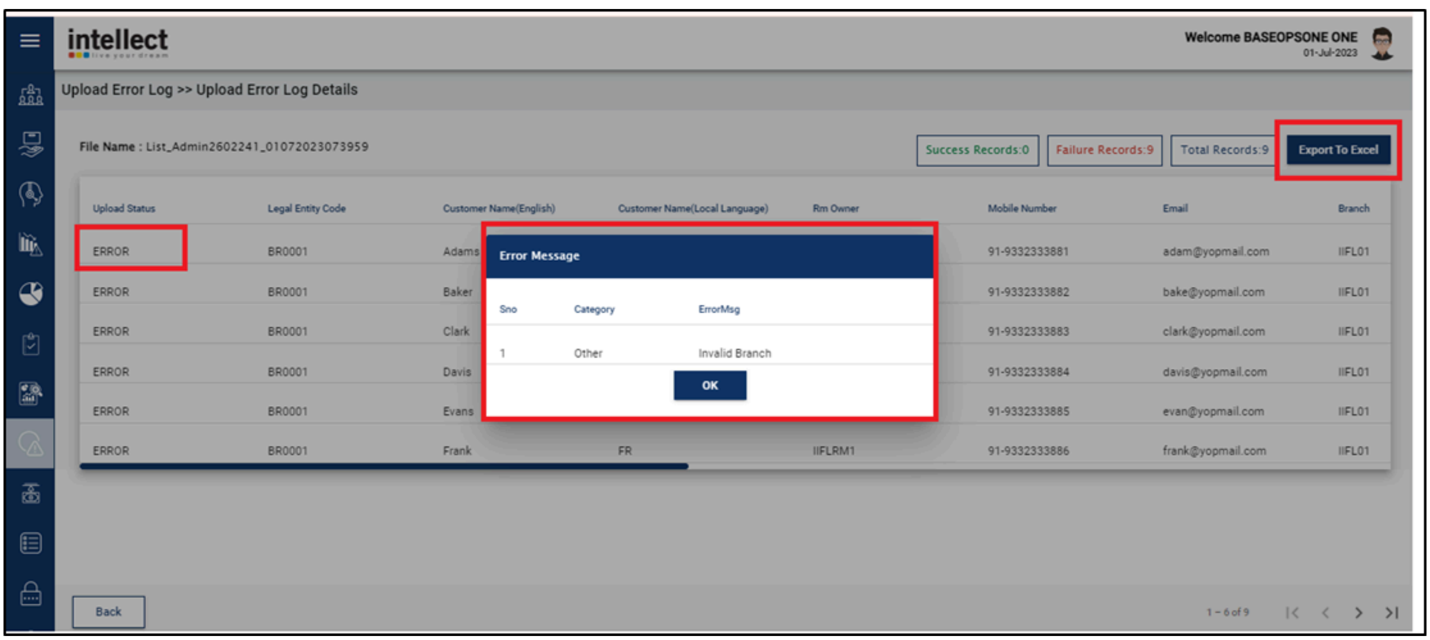
Screen: Select Error Log Record for View

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



Screen: View Error Log Detailed Summary

5. They 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 "Export to Excel" 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 has been discussed in detail in the Journey of Lead to Prospect and Prospect to Customer document

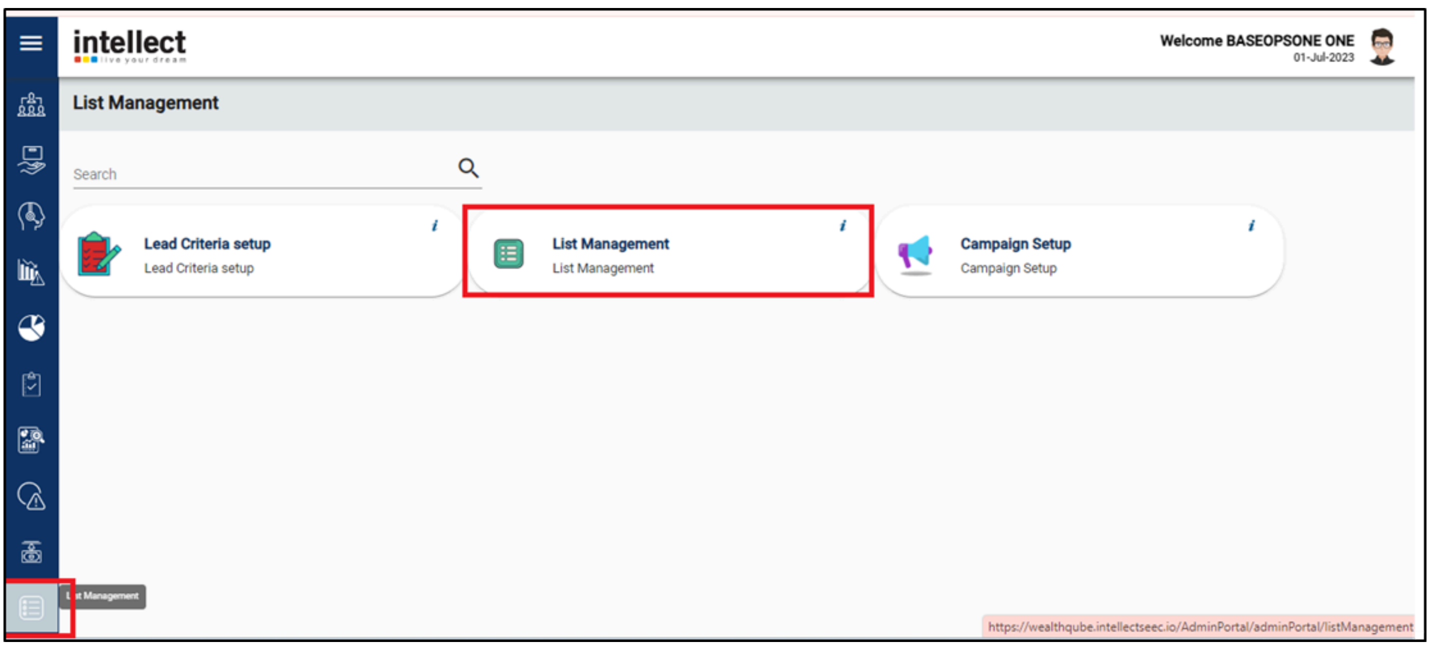
4.2.4 List Management

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

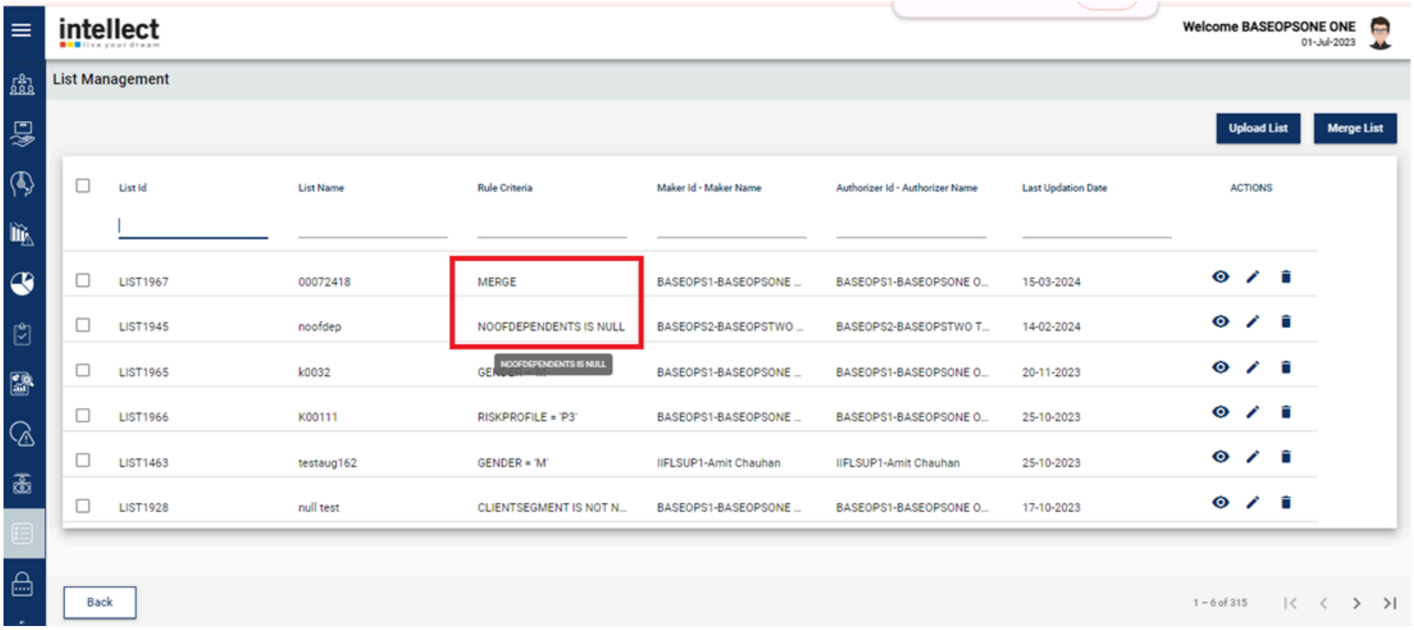
NOTE: The lead lists present in the List Management screen will be available for attaching to a Campaign during the Campaign Definition process

1. The User clicks on "List Management" from the left sidebar menu and selects the "List Management" sub-menu



Screen: Upload Lead List Navigation

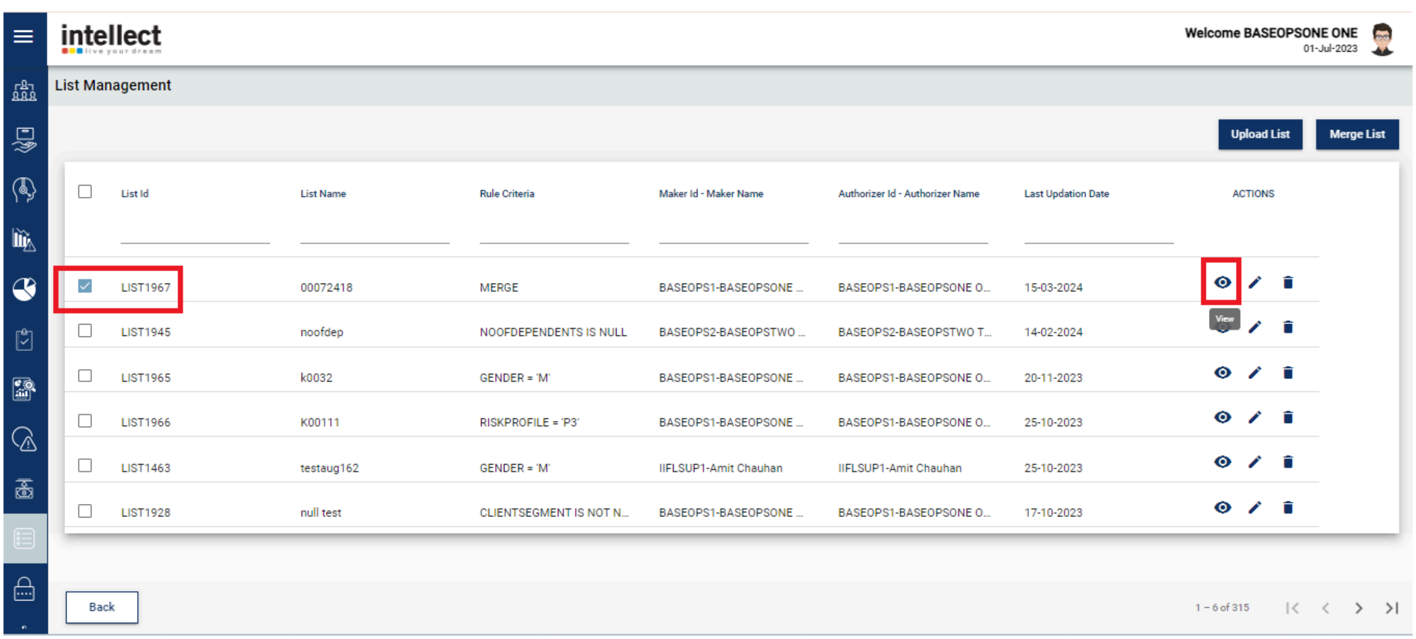
2. The user can view all the existing and newly created lead lists in the system. In the case where lists are generated using the lead rule criteria, the criteria is displayed in the Rule Criteria column. For the lists created by lead upload or merging the lead lists (UPLOAD, MERGE), the same is displayed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



Screen: List Management Screen

4.2.4.1 View Lead List

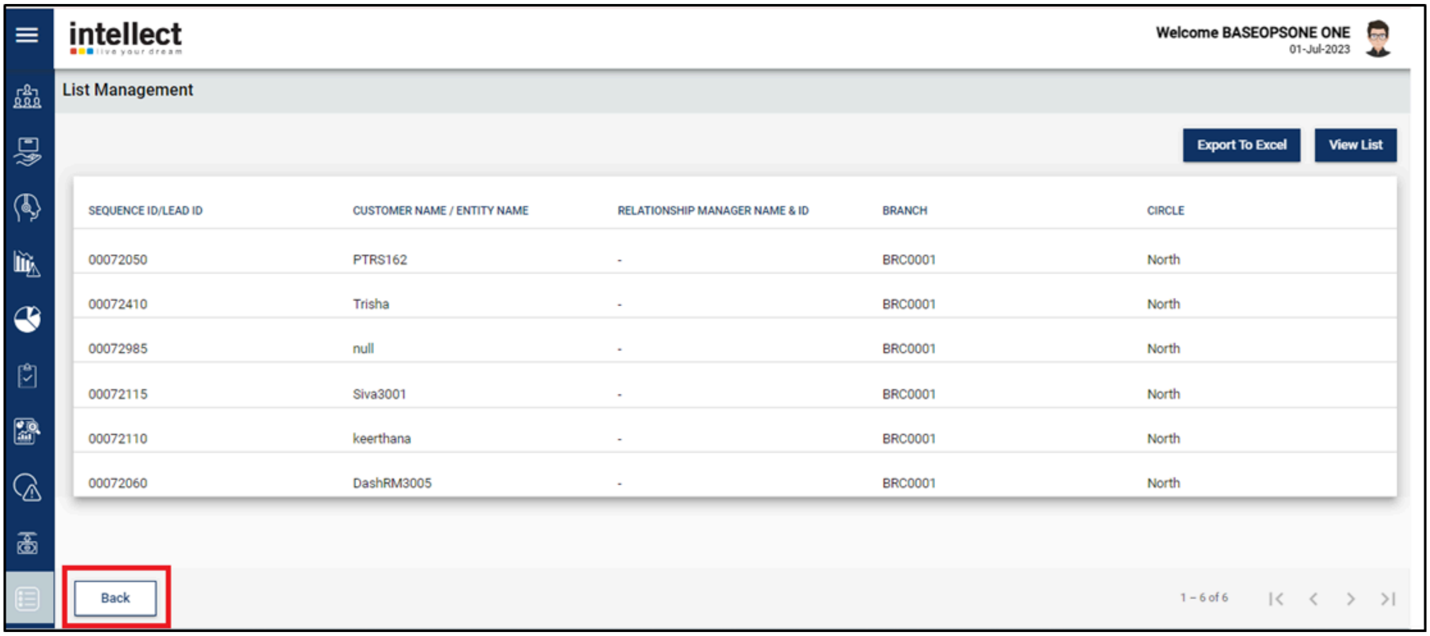
1. The user selects the Lead List and clicks on the "View" button to view the list



Screen: View the Lead List

2. The user views the Lead List Information and clicks on the "Back" button to navigate back to the list management

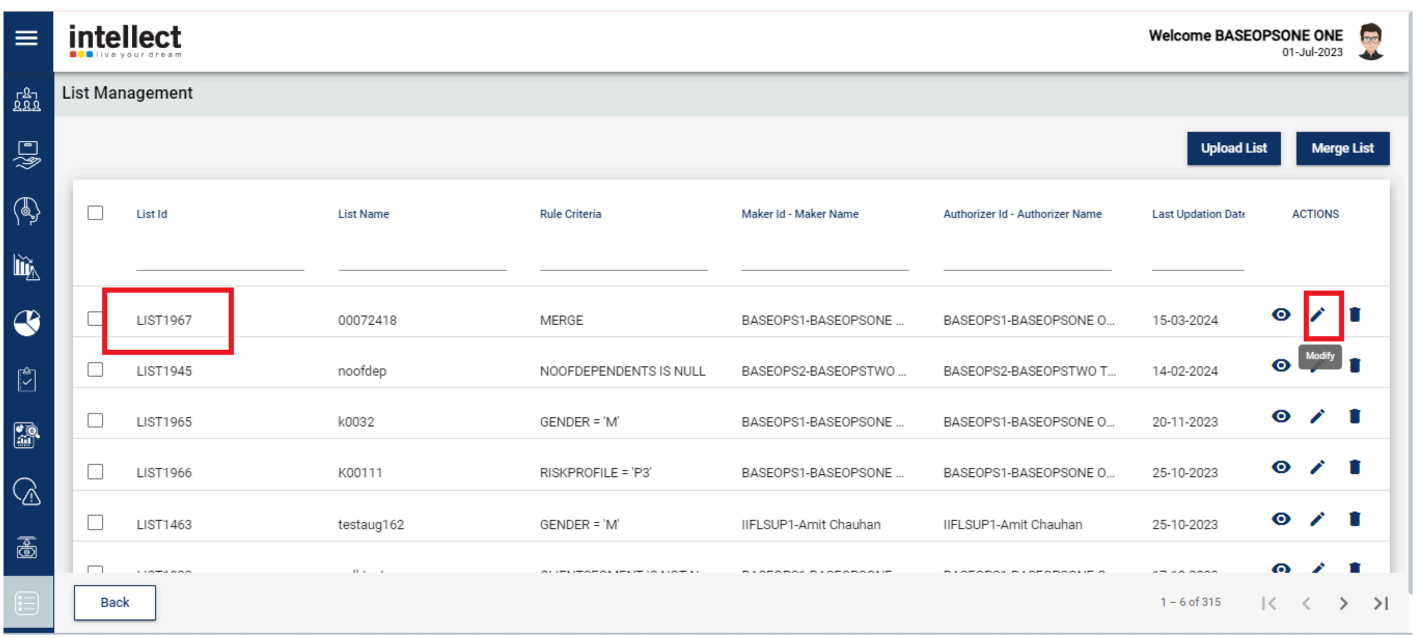
![intellect Design for Digital]



Screen: View the Lead List - Leads Information

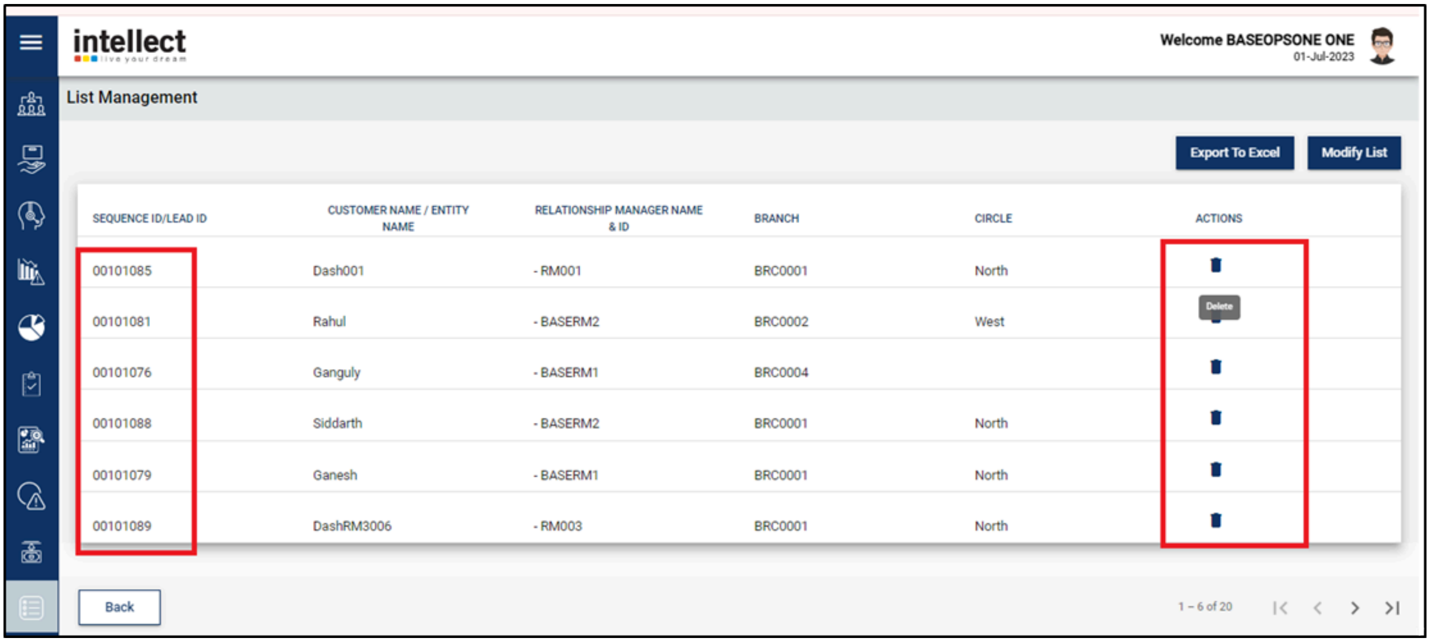
4.2.4.2 Modify Lead List

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. Multiple such records can be removed from the list

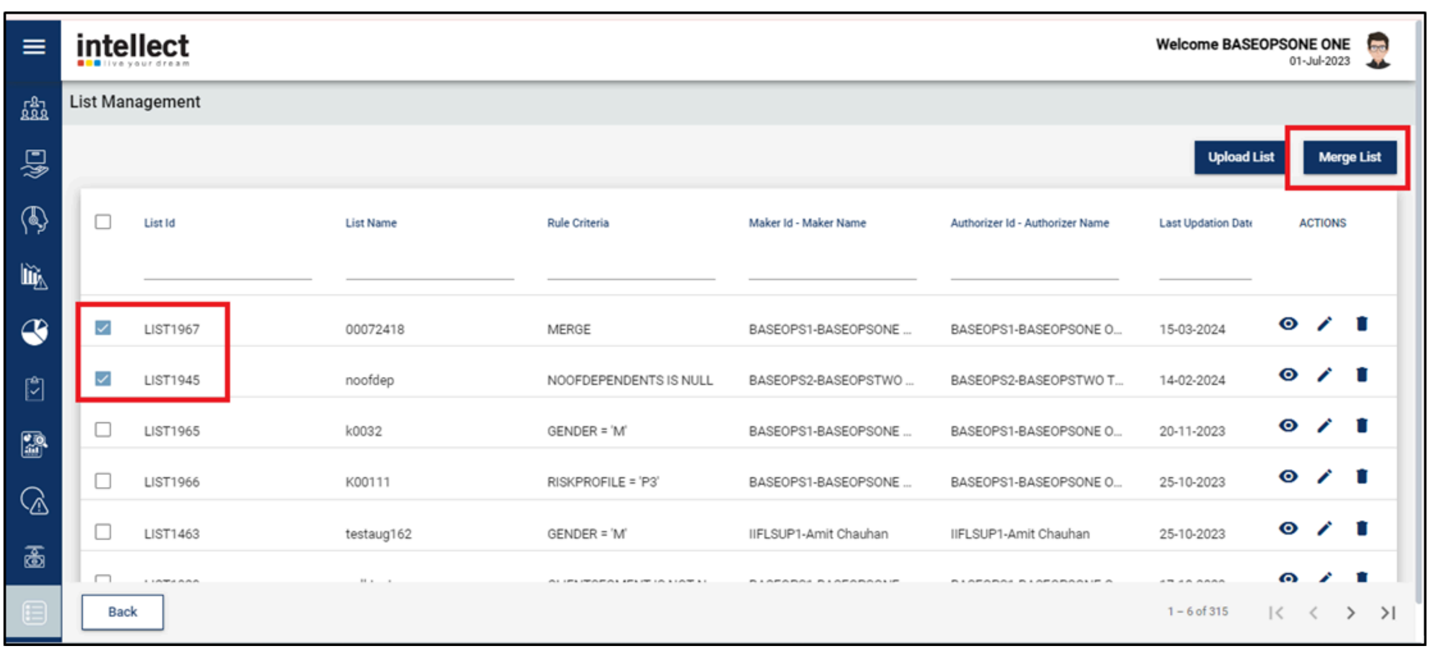


Screen: Remove the Lead from Lead List

4.2.4.3 Merge Lead Lists

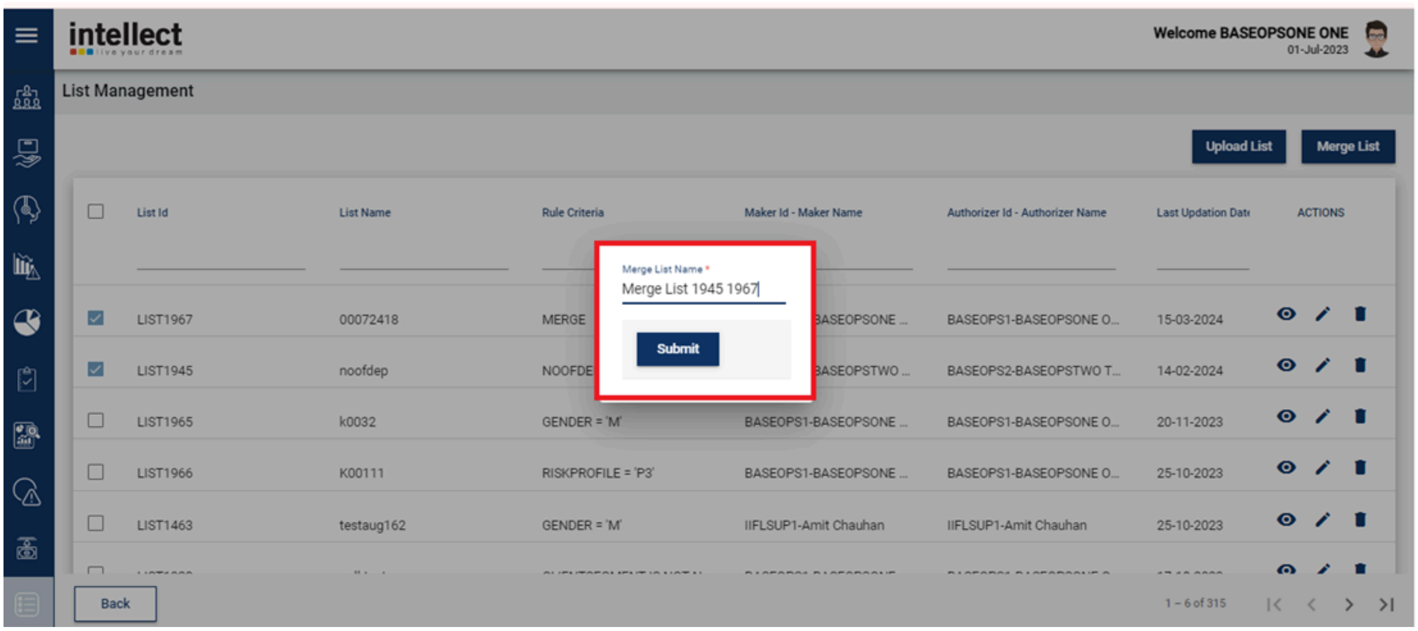
Multiple lists present in the list management can be merged to create a single list. This will be created as a new list in the system

1. The user selects the lists by clicking on the checkbox available against each record and clicks on the “Merge List” button



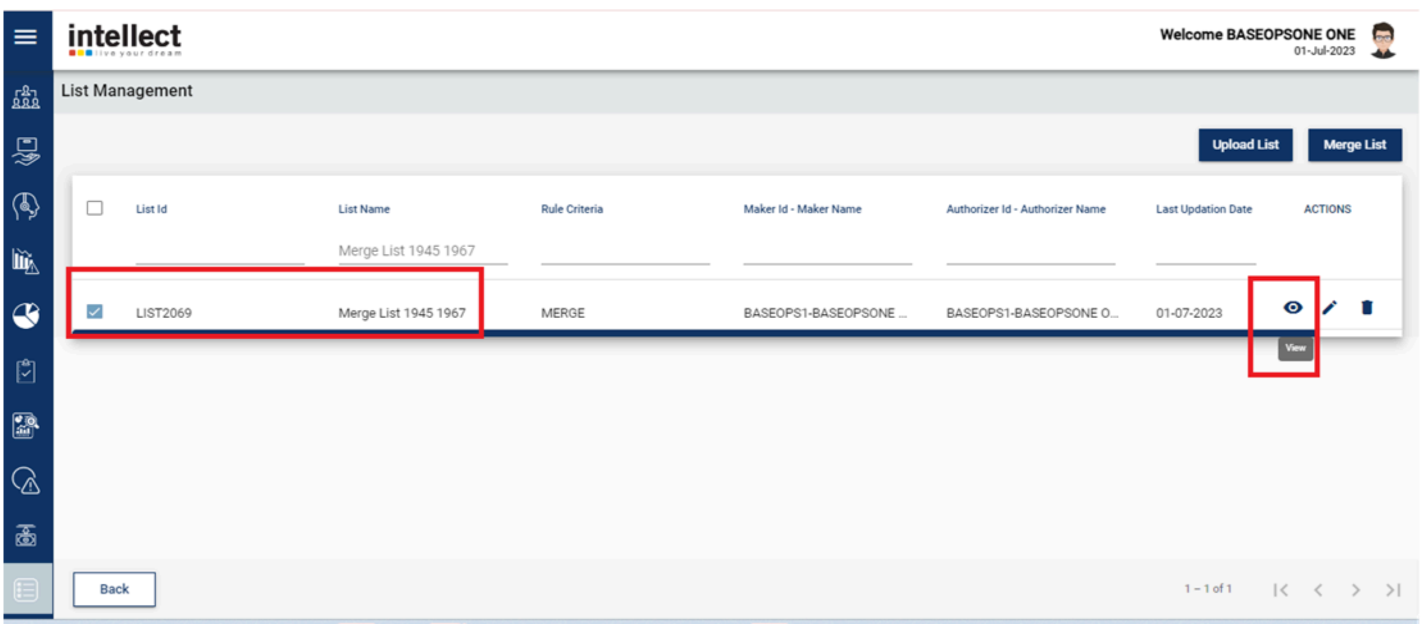
Screen: Merge Lead Lists

2. The user inputs the list name for the merged list and clicks on "Submit" and a new list is created



Screen: Creating Merged Lead List

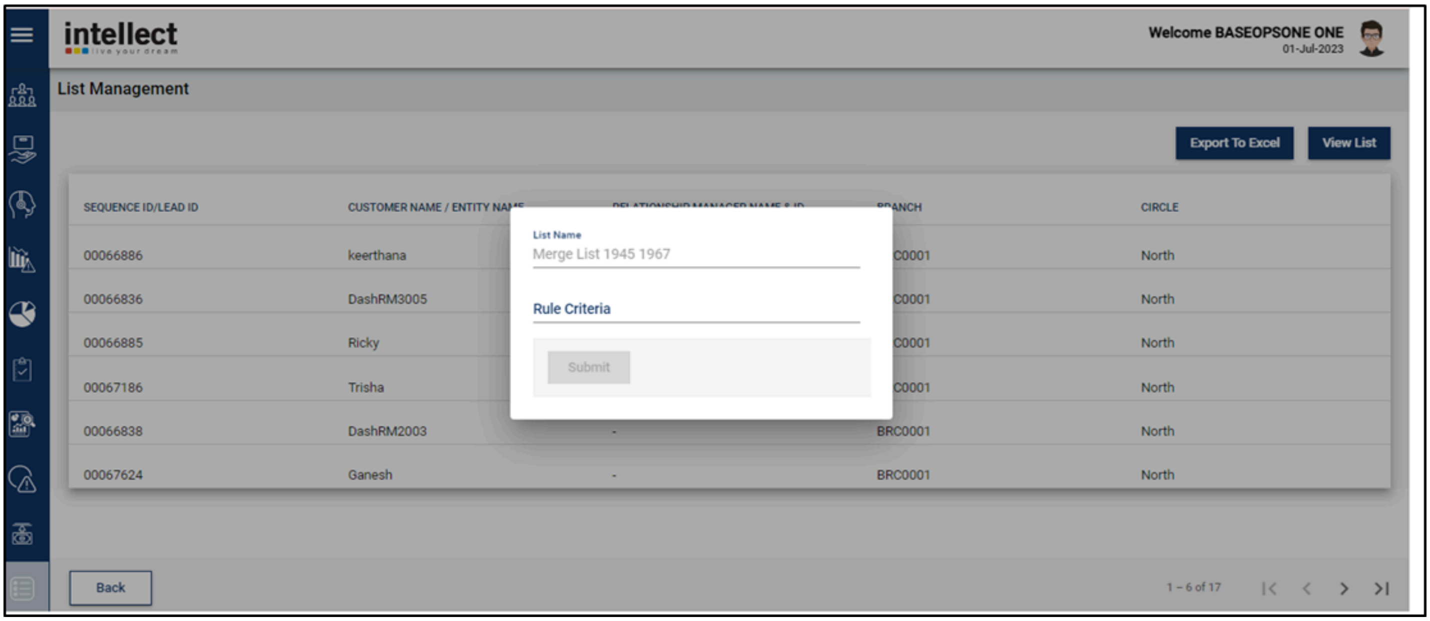
3. The user selects the merged lead list record and clicks on the "View" button to view the leads



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 each record level on the following parameters:

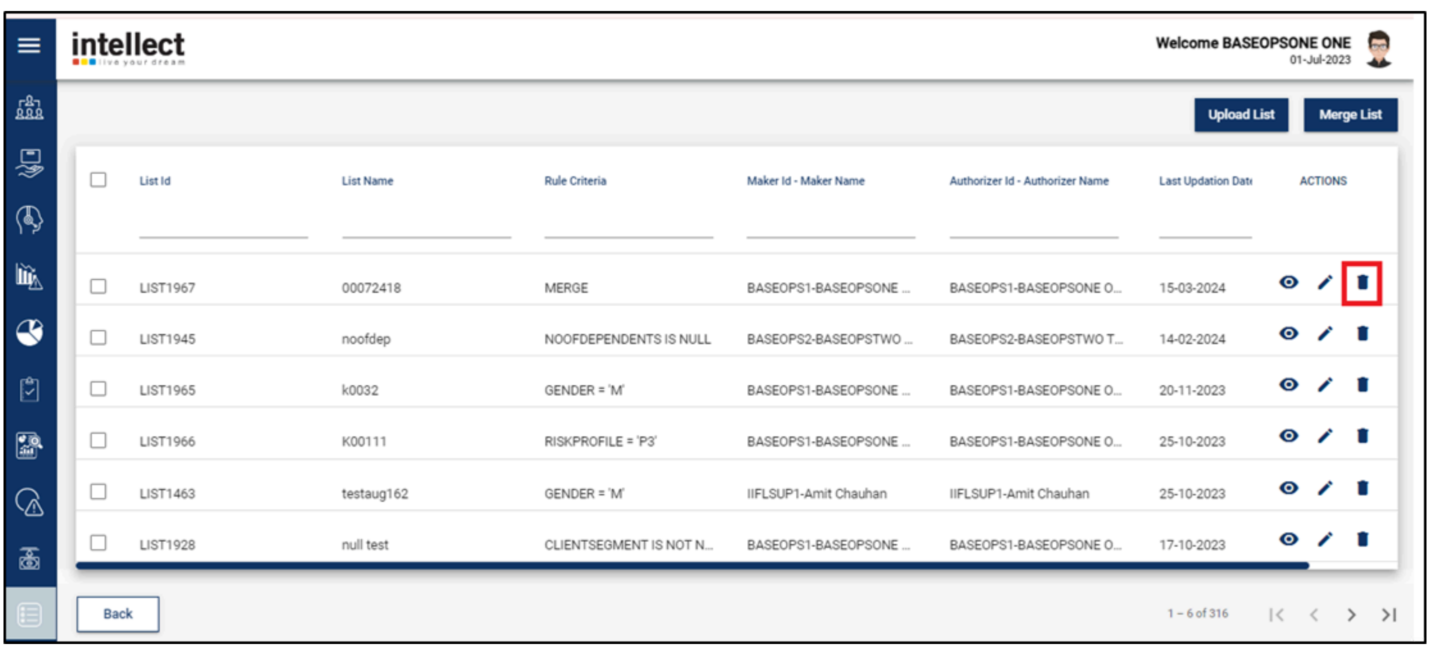
a. Customer Name(English) + Primary Contact No
b. Customer Name(English) + Email
c. Customer Name(Local Language) + Primary Contact No
d. Customer Name(Local Language) + Email



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. The user clicks on the “Delete” icon and then “Submit” to delete the list

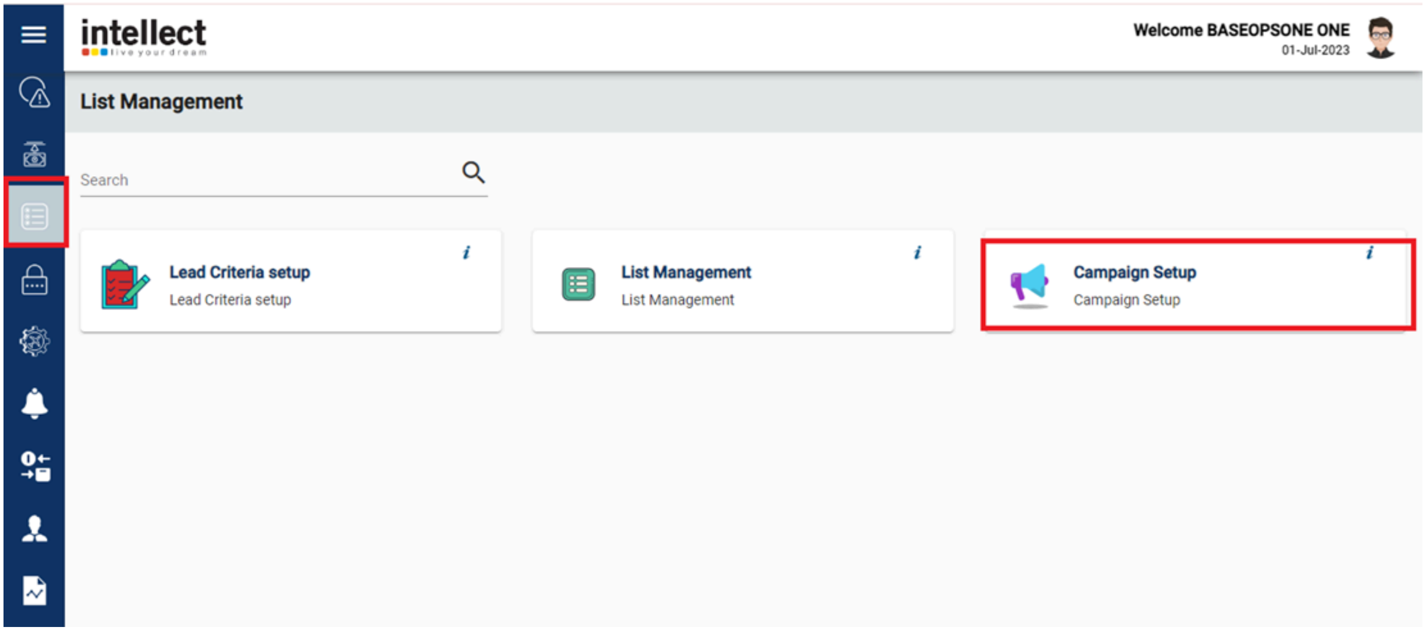
Note: Lists that are linked to a campaign can’t be deleted

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

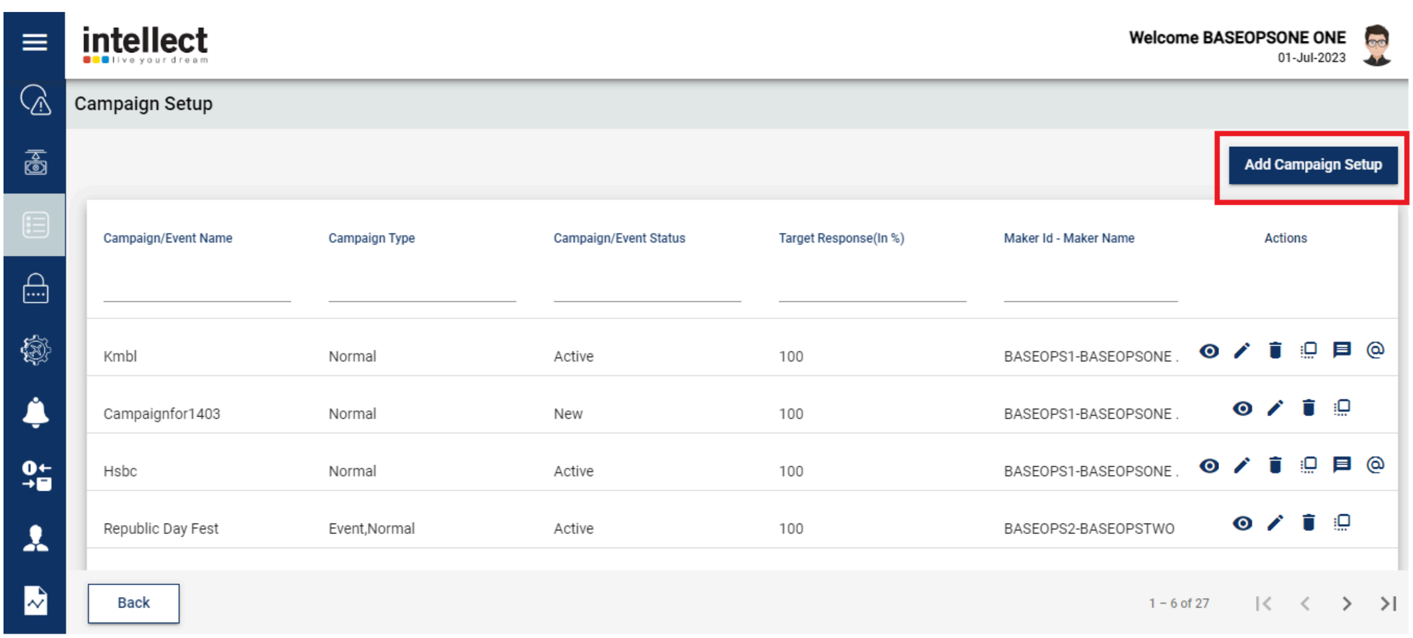
User logs into Operations office, clicks on the “List Management” menu from left sidebar menu and then clicks on the “Campaign Setup” sub-menu



Screen: Navigate to the Campaign Management screen

4.3.1 Define a New Campaign

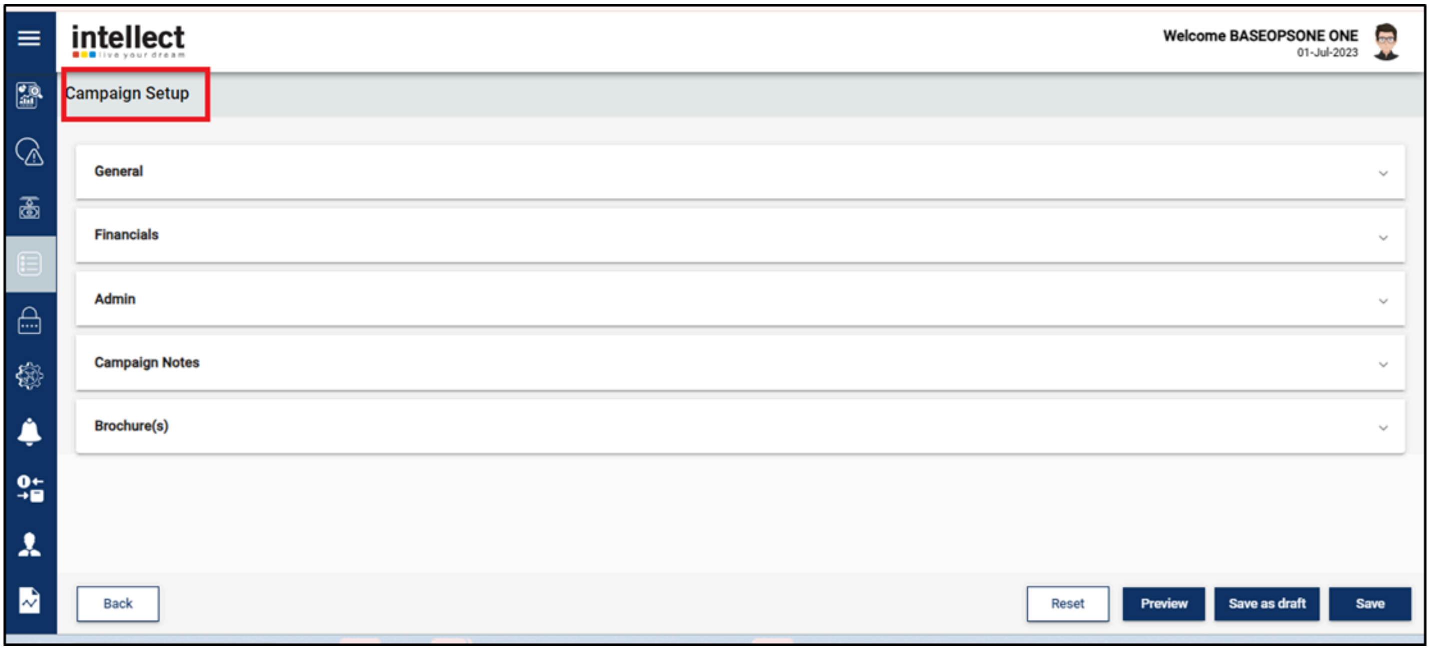
1. On the Campaign Management screen, the User clicks on the "New" button to navigate to the New Campaign screen, where they can create a new campaign



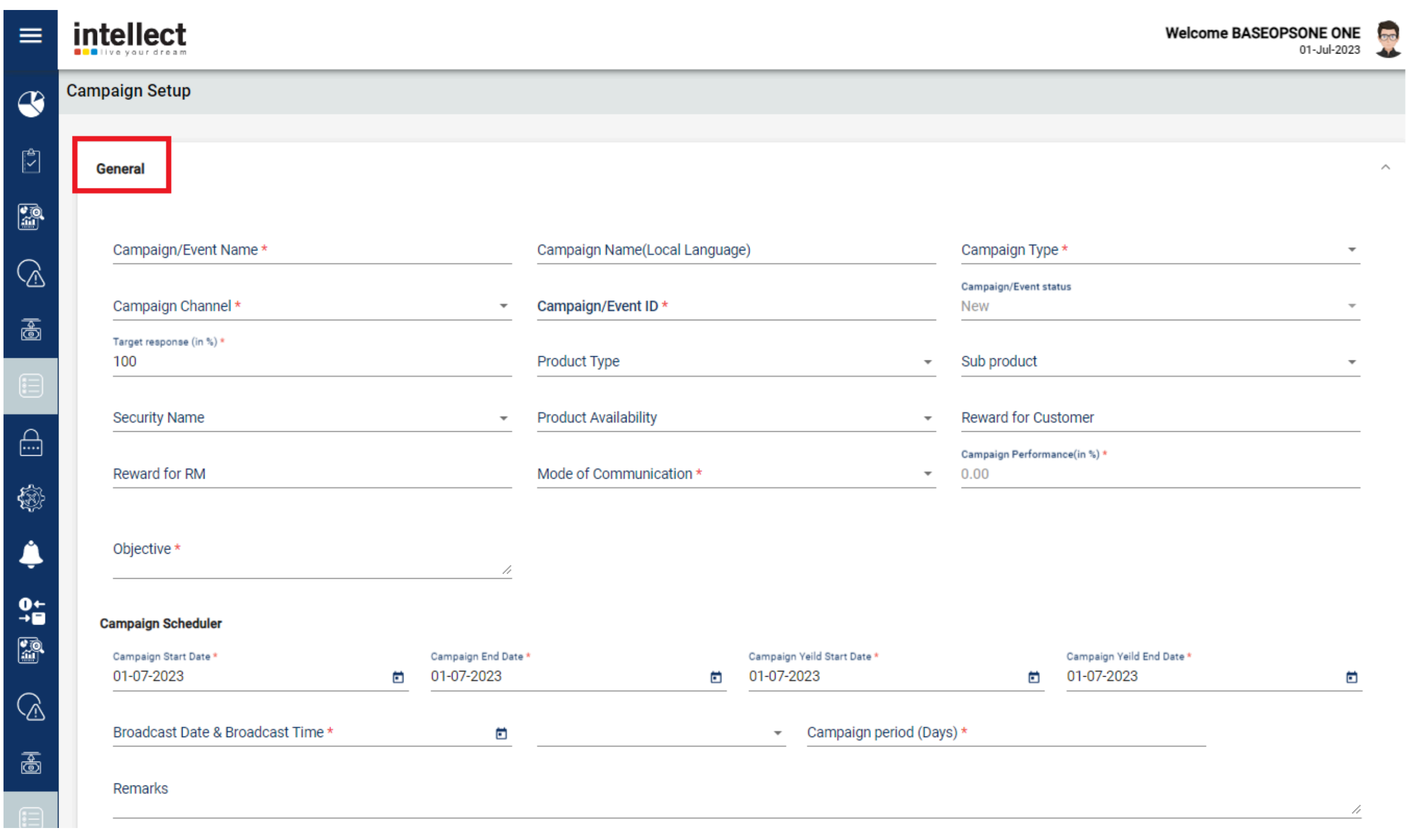
Screen: Define a New Campaign

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.

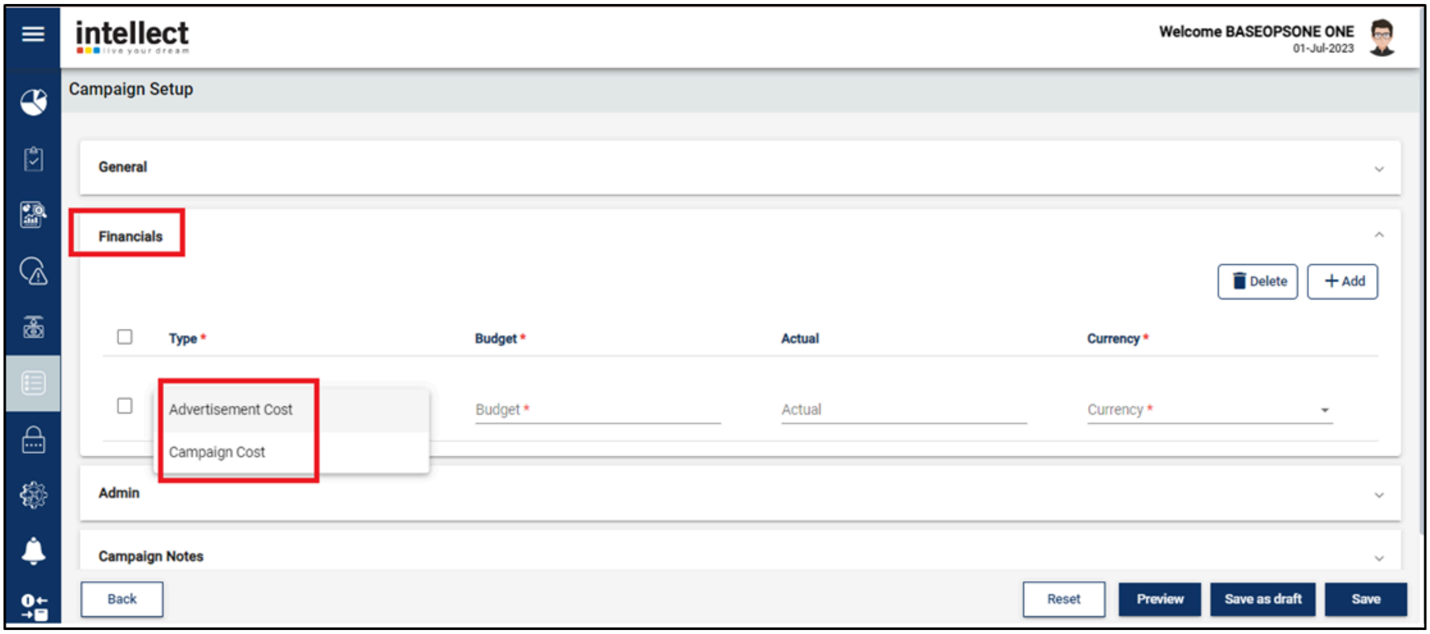


Screen: Campaign Setup



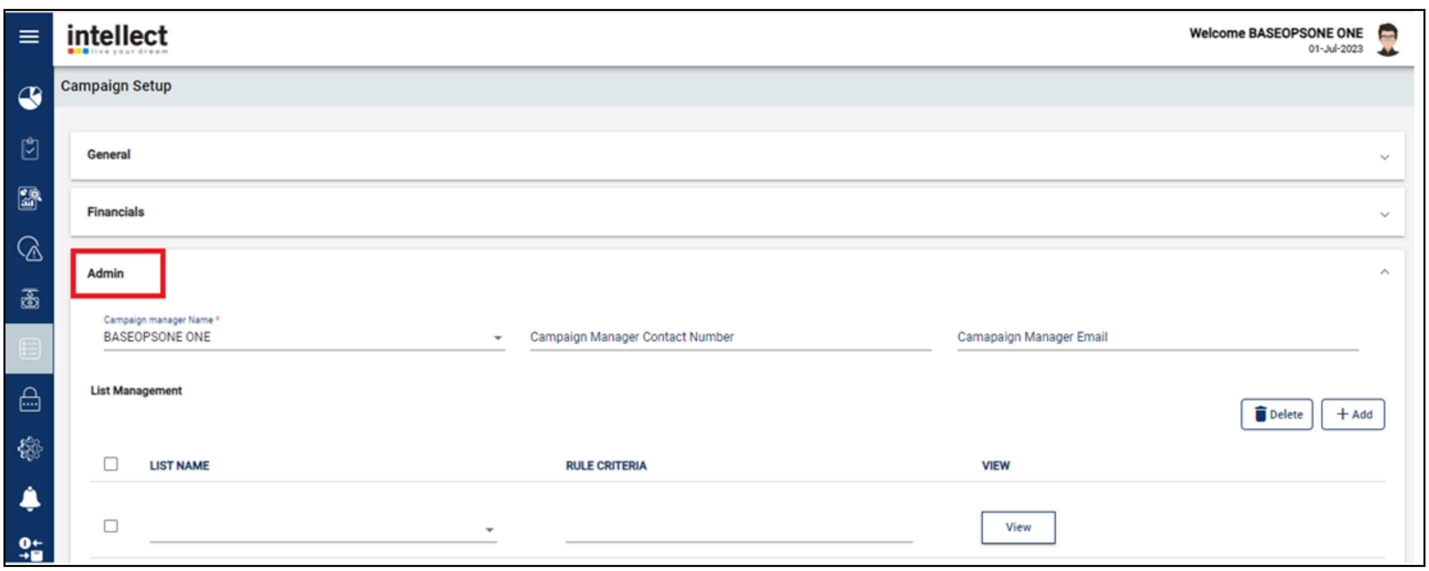
Screen: Capture General Information

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



Screen: Capture Financial Information

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

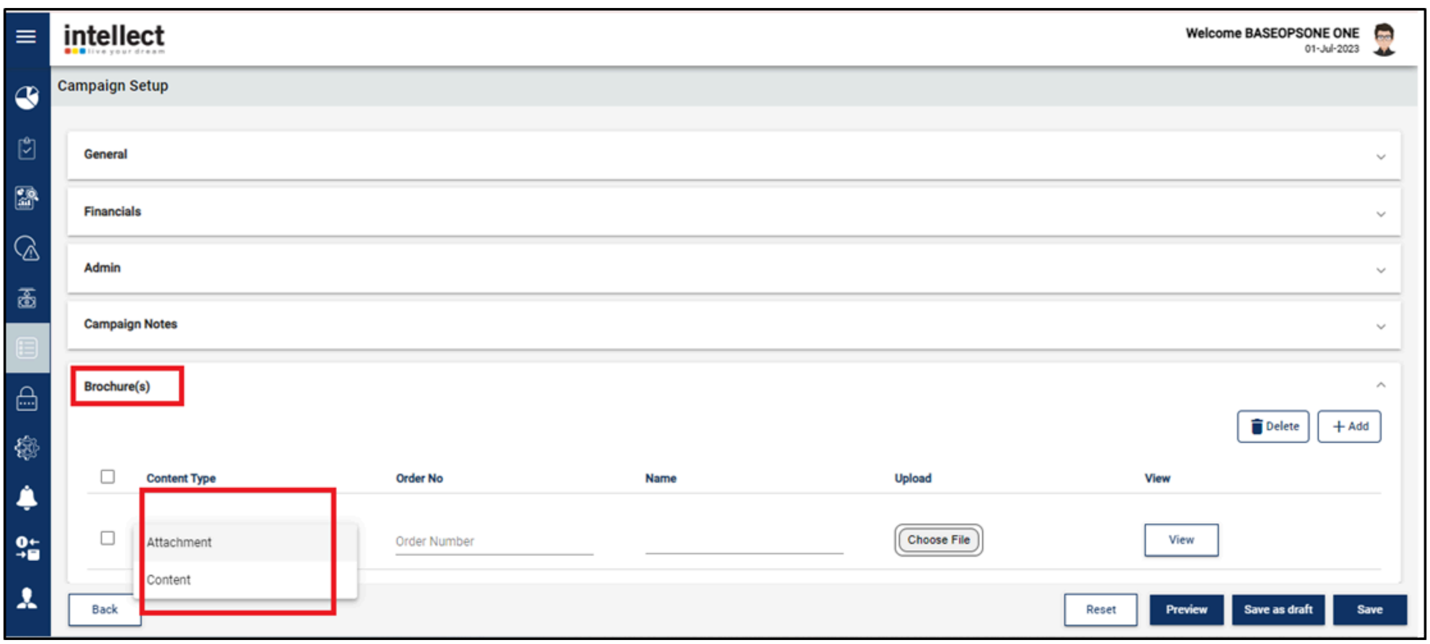


Screen: Capture Admin details and Target List

d. **Campaign Notes** - Capture content for the Email and/or SMS that will be sent out as part of the campaign. The sections here will depend on the Campaign channels selected

Screen: Capture Campaign Notes

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

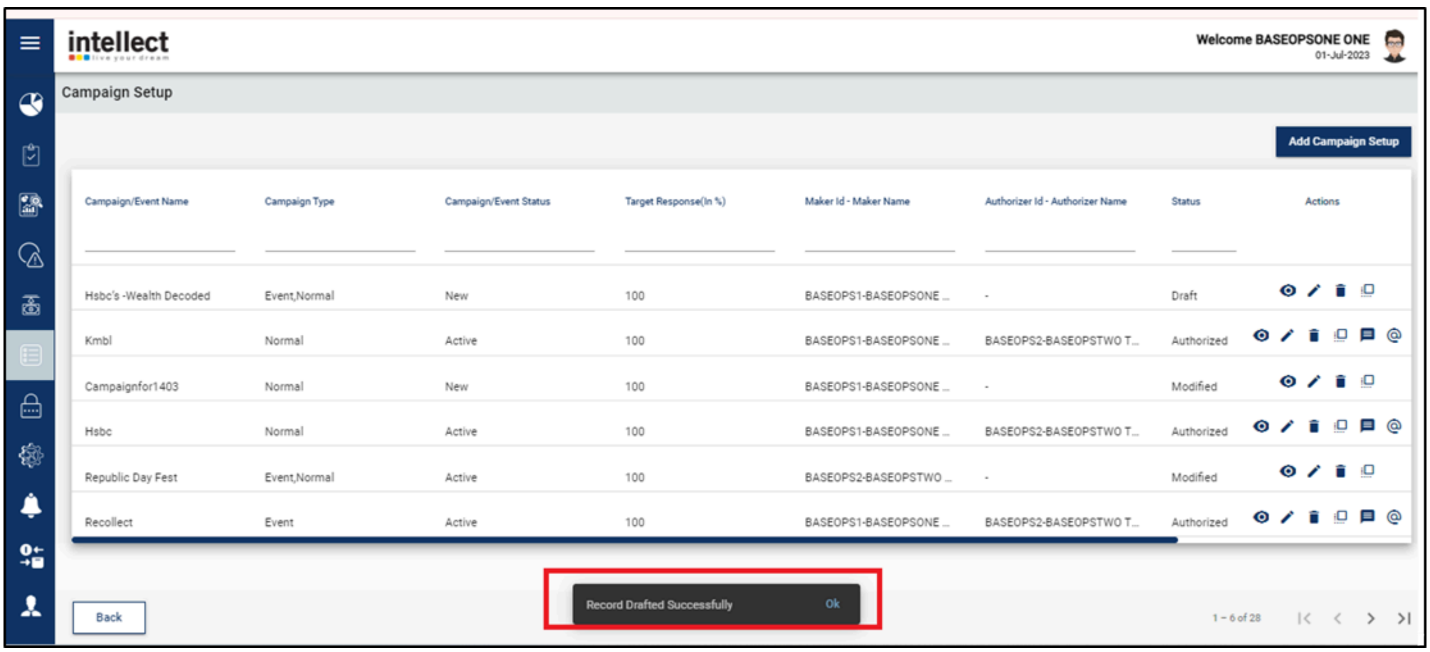


Screen: Attach Brochures

f. After the User has captured all relevant details related to the campaign, they can perform the following actions:
   i. **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 as per the Broadcast date and time

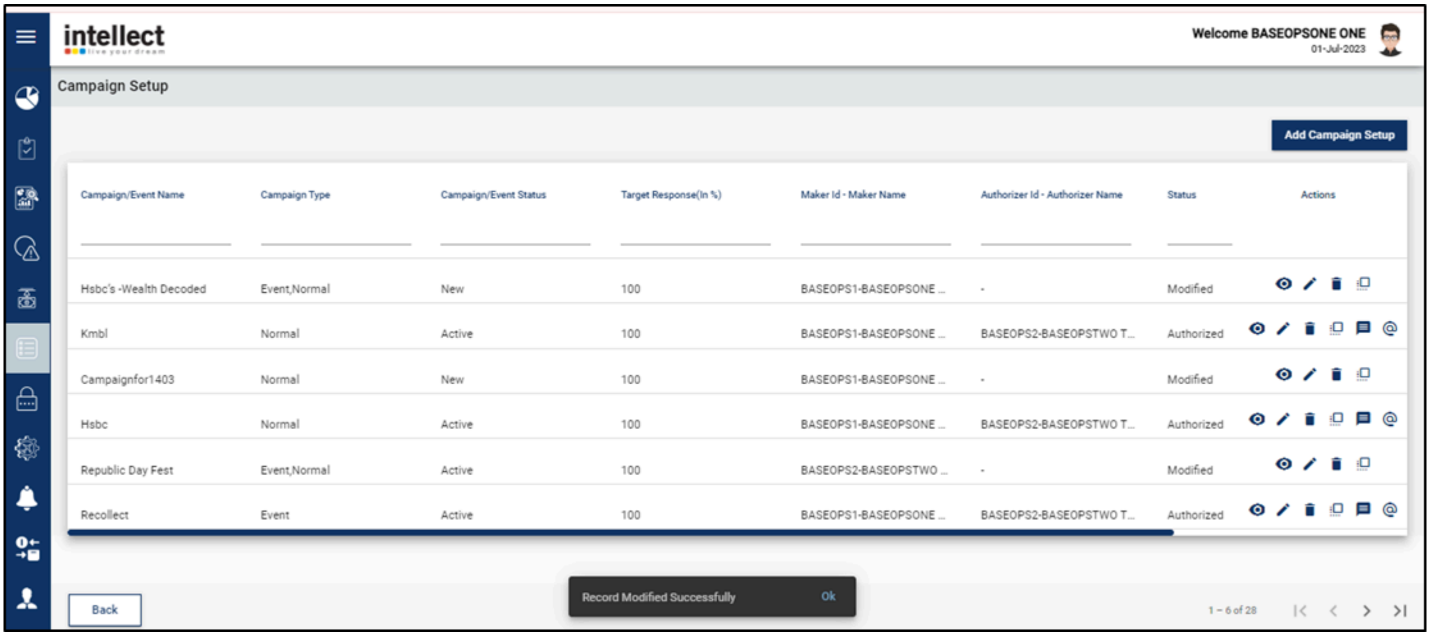
Screen: Preview Email

ii. **Save as Draft** - Click on the "Save as Draft" button to save the campaign in draft mode. Campaigns with such a status are not sent for approval. The draft can be viewed/modified from the Campaign Management screen



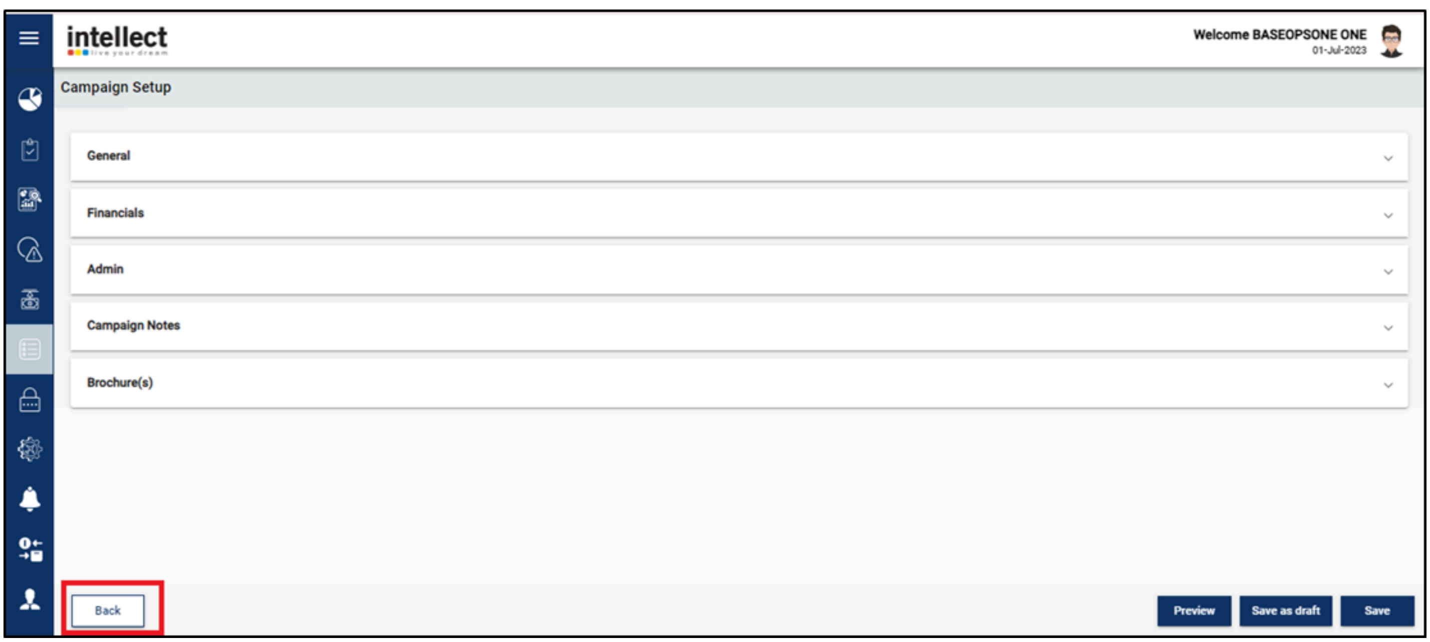
Screen: Save as Draft

iii. **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

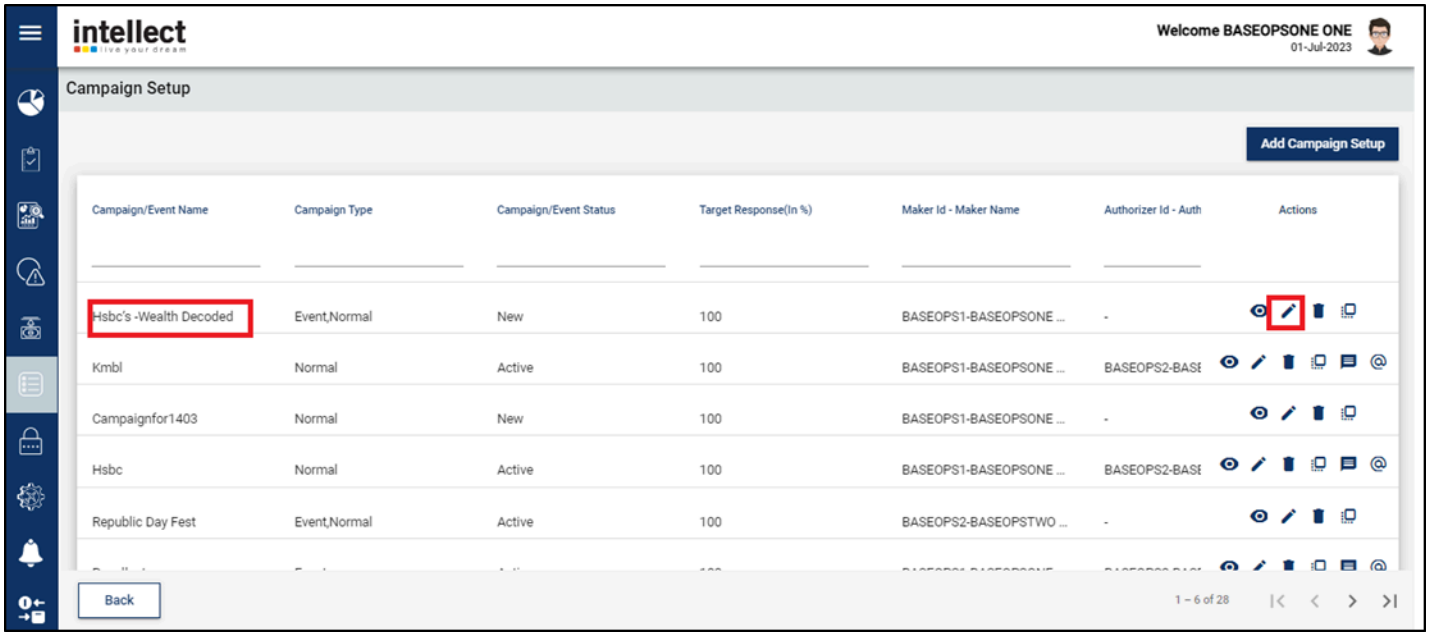
iv. **Back**- Click on the "Back" button on the subsequent overlay to navigate back to the Campaign Management screen



Screen: Back to Campaign List

4.3.2 Modify an Existing Campaign

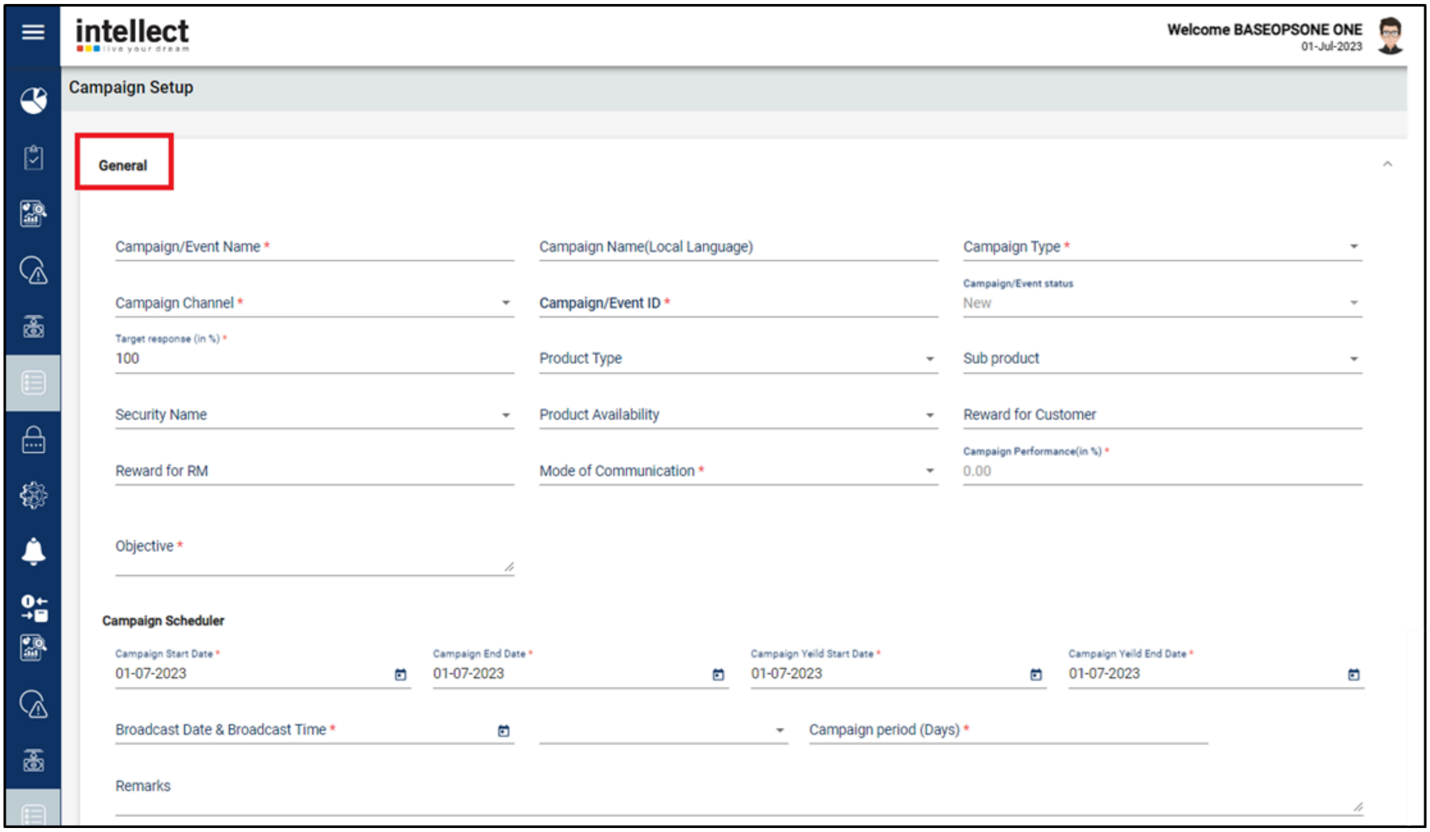
1. On the Campaign Management screen, the User clicks on the "Modify" button after selecting a campaign to navigate to the Modify Campaign screen, where they can modify a campaign



Screen: Modify an Existing Campaign

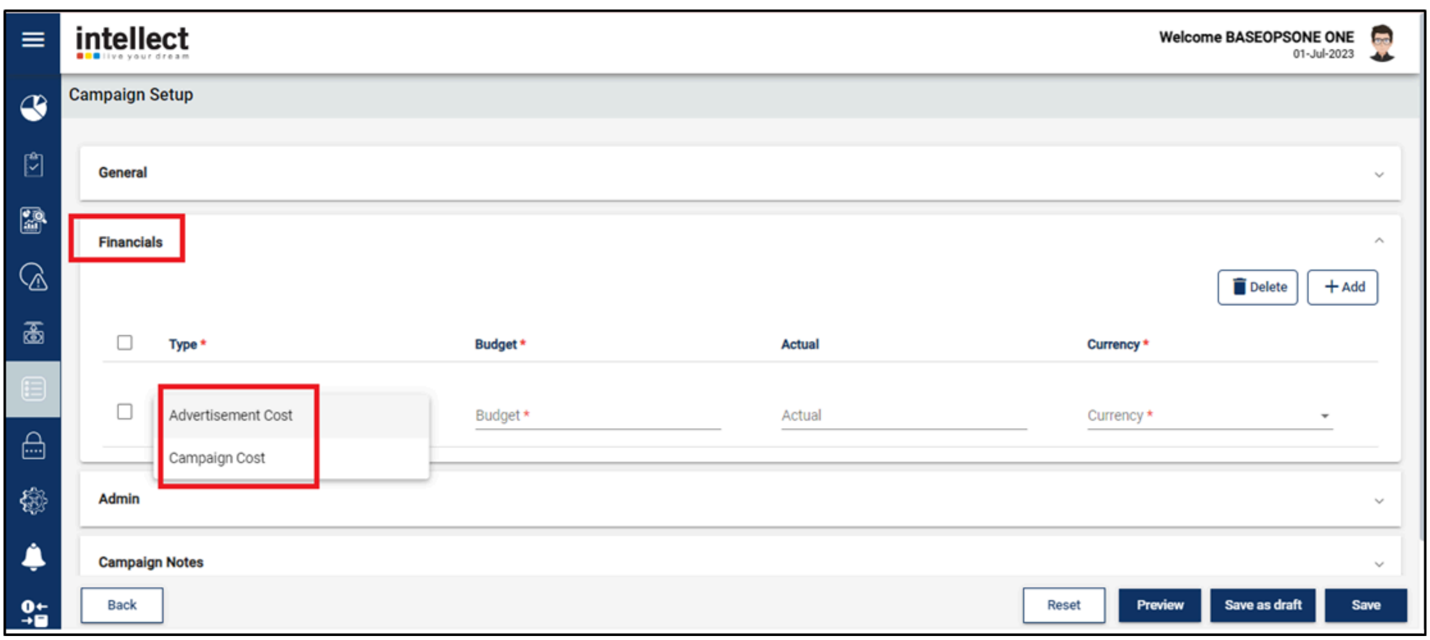
2. In the Modify Campaign screen, the User can navigate through the following tabs to capture campaign details:

   a. **General** - Modify General information such as Campaign Name, Channel, etc.



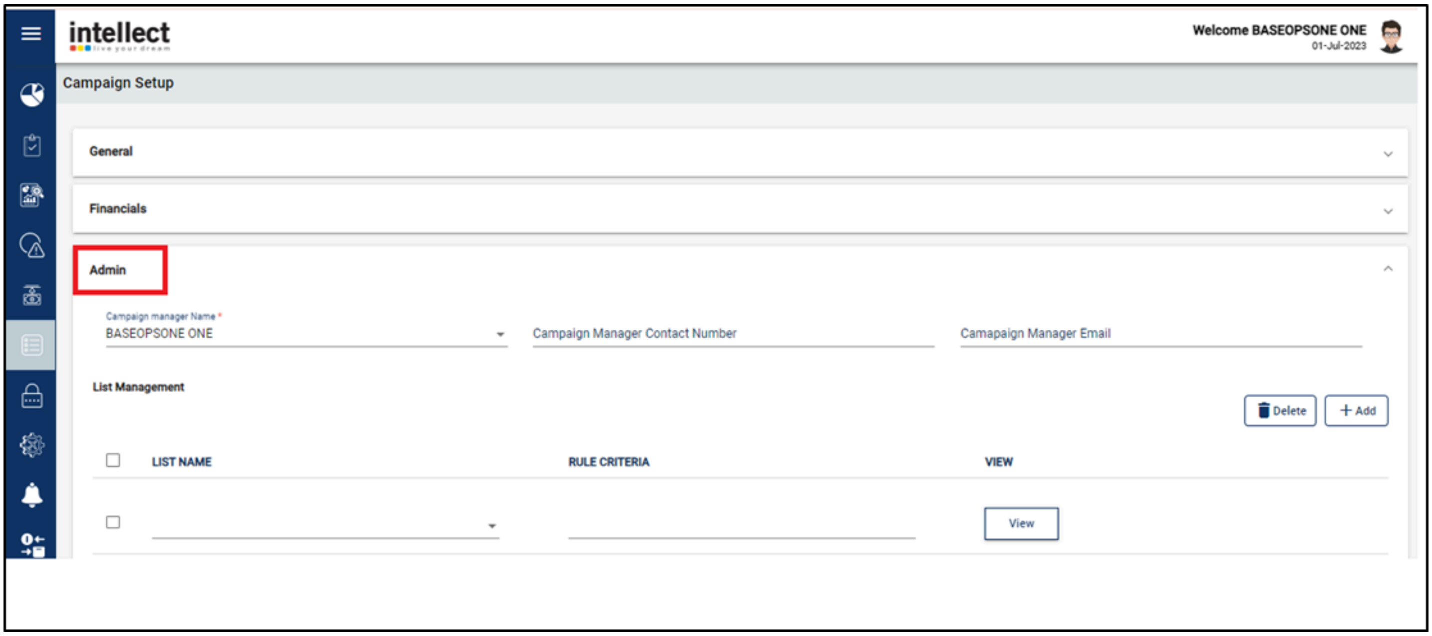
Screen: Modify General Information

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



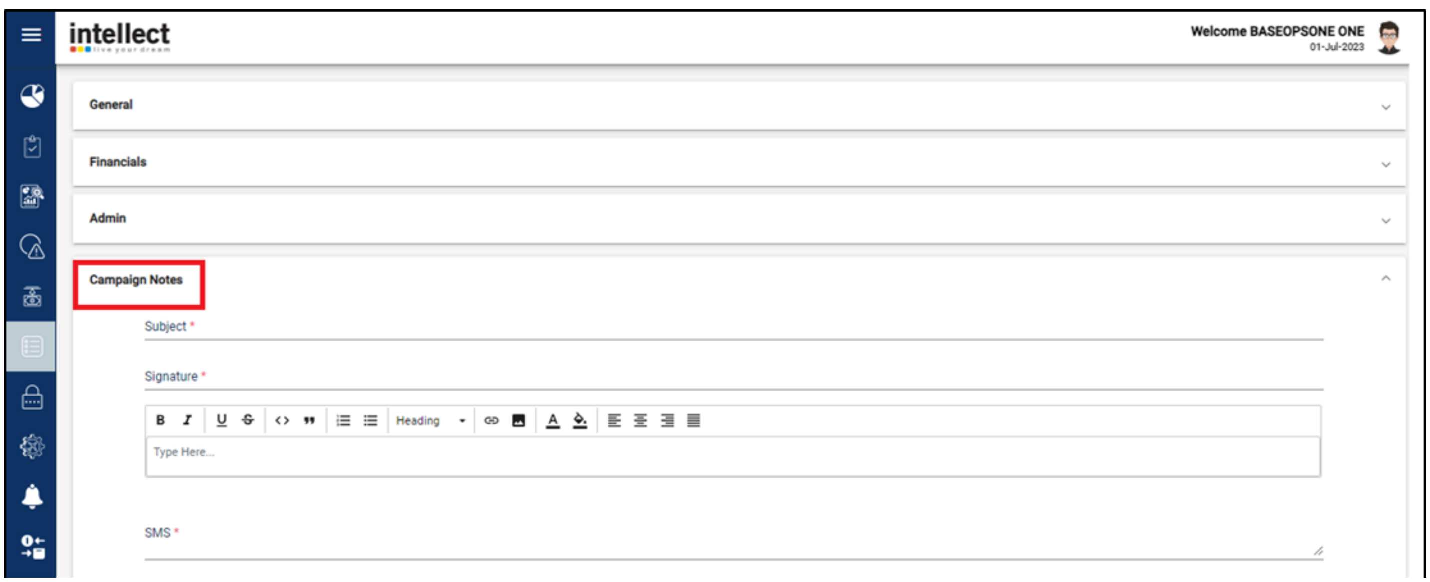
Screen: Modify Financial Information

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



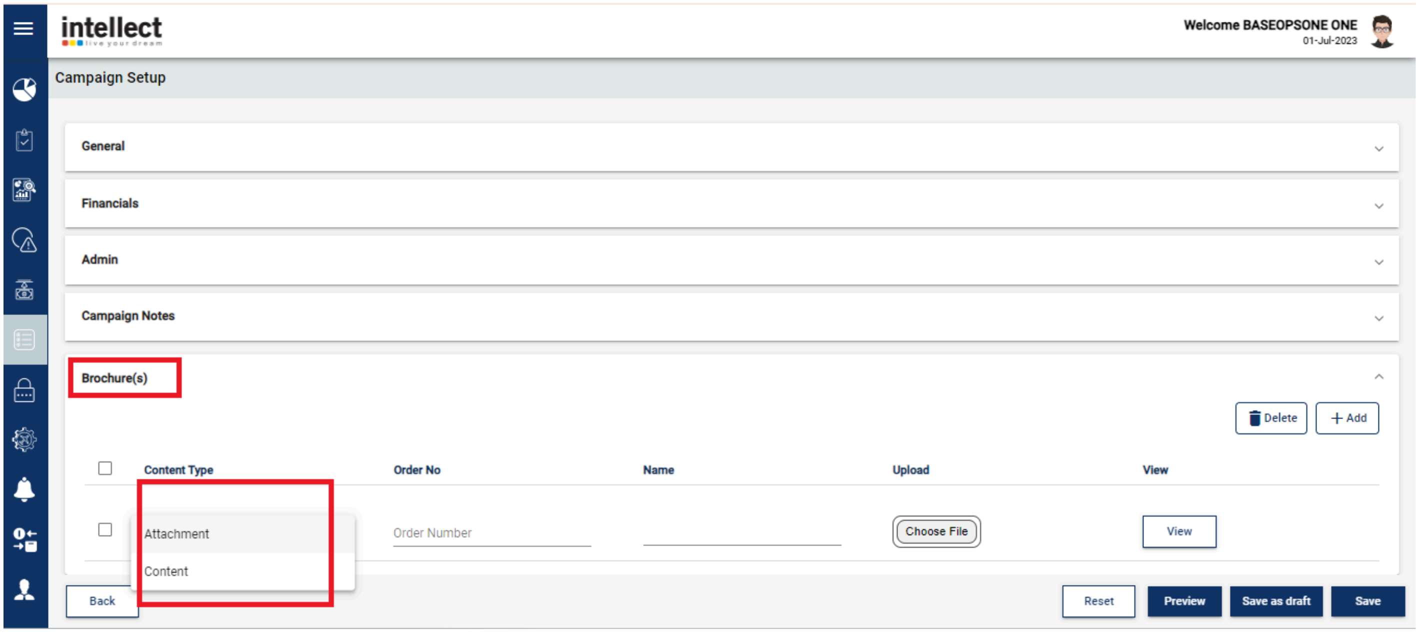
Screen: Modify Admin details

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

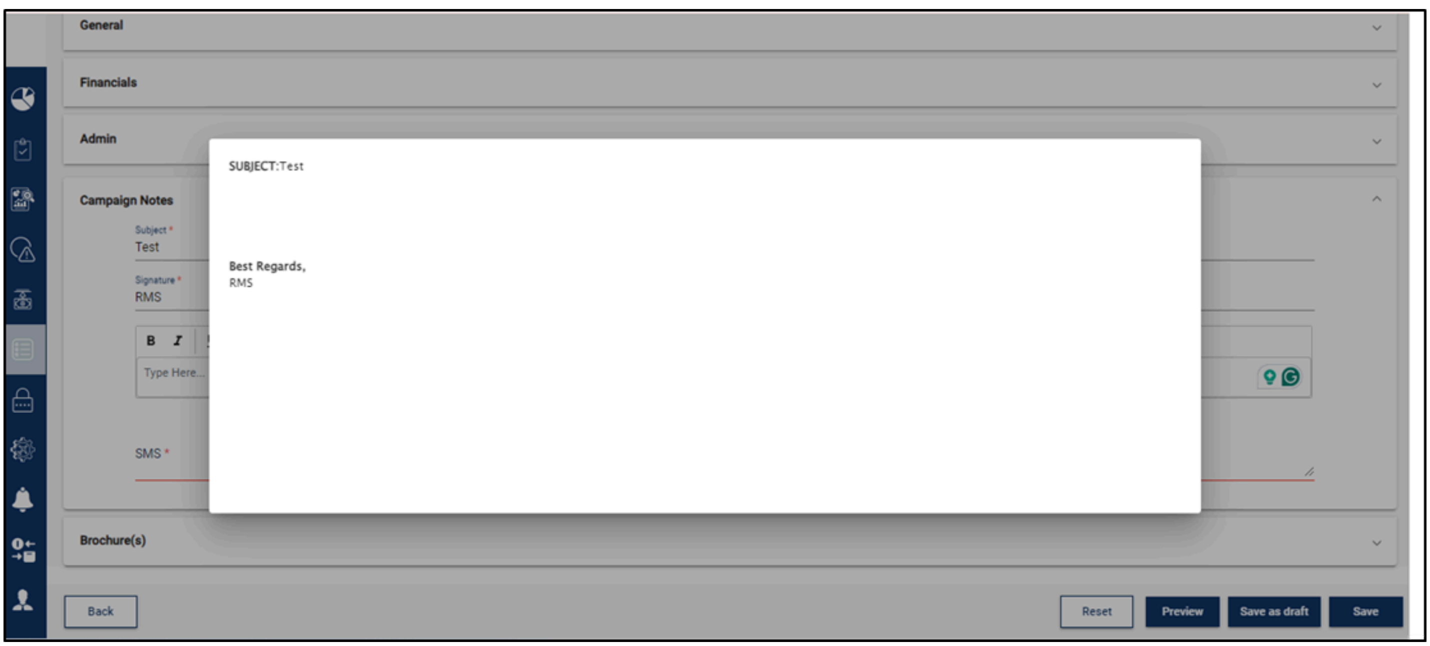
e. **Brochure** - Attach/Remove brochures related to the campaign



Screen: Attach/Remove Brochures

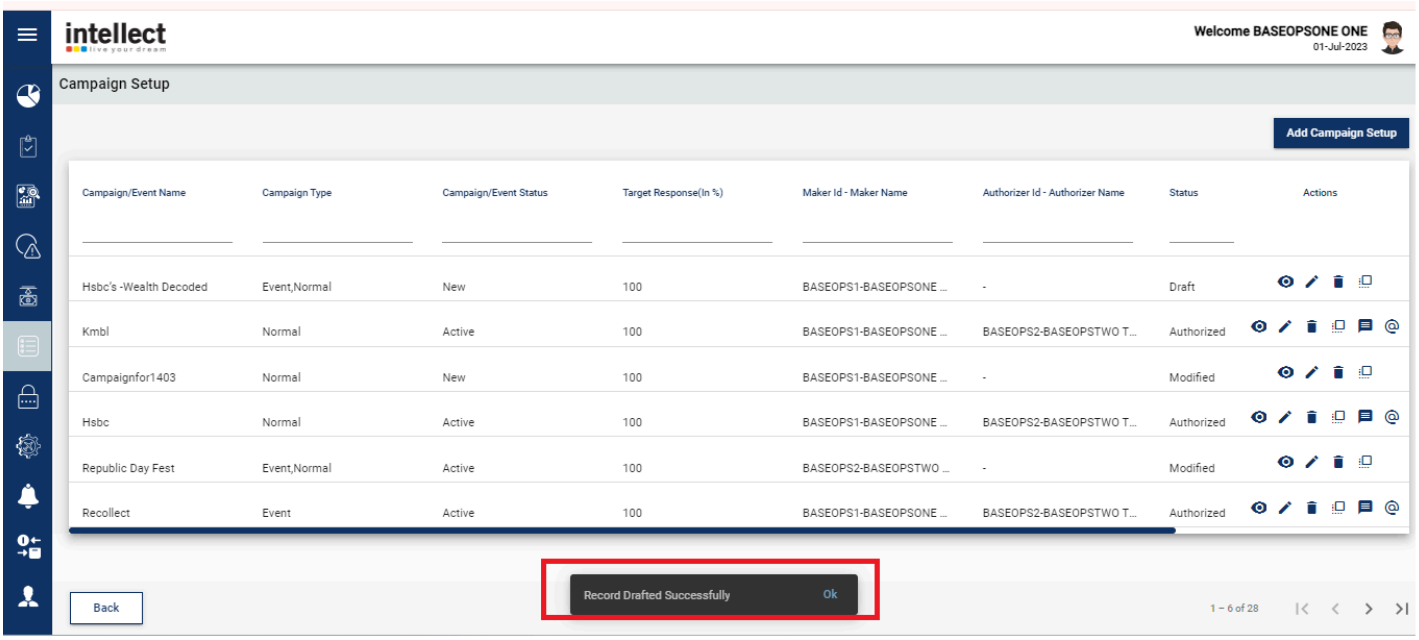
f. After the User has modified all relevant details related to the campaign, they can perform the following actions:

   i. **Preview** - Click on the "Preview" button to view the Email details related to the campaign



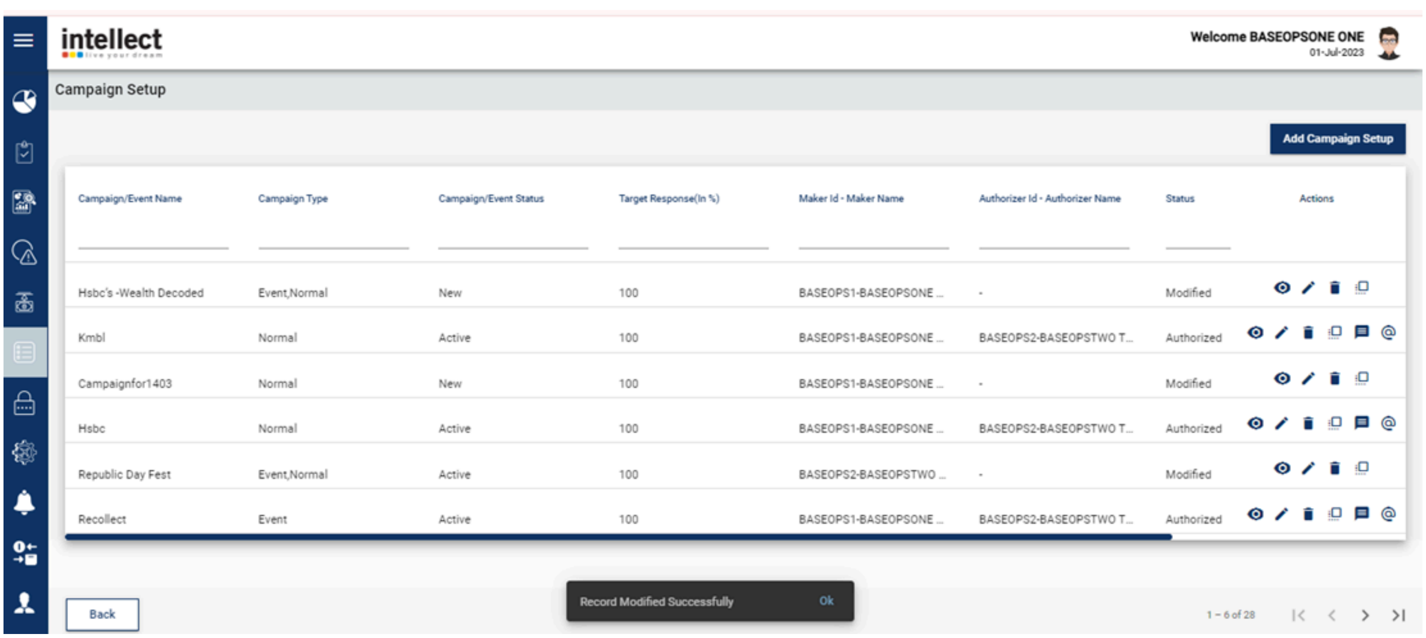
Screen: Preview Email

   ii. **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



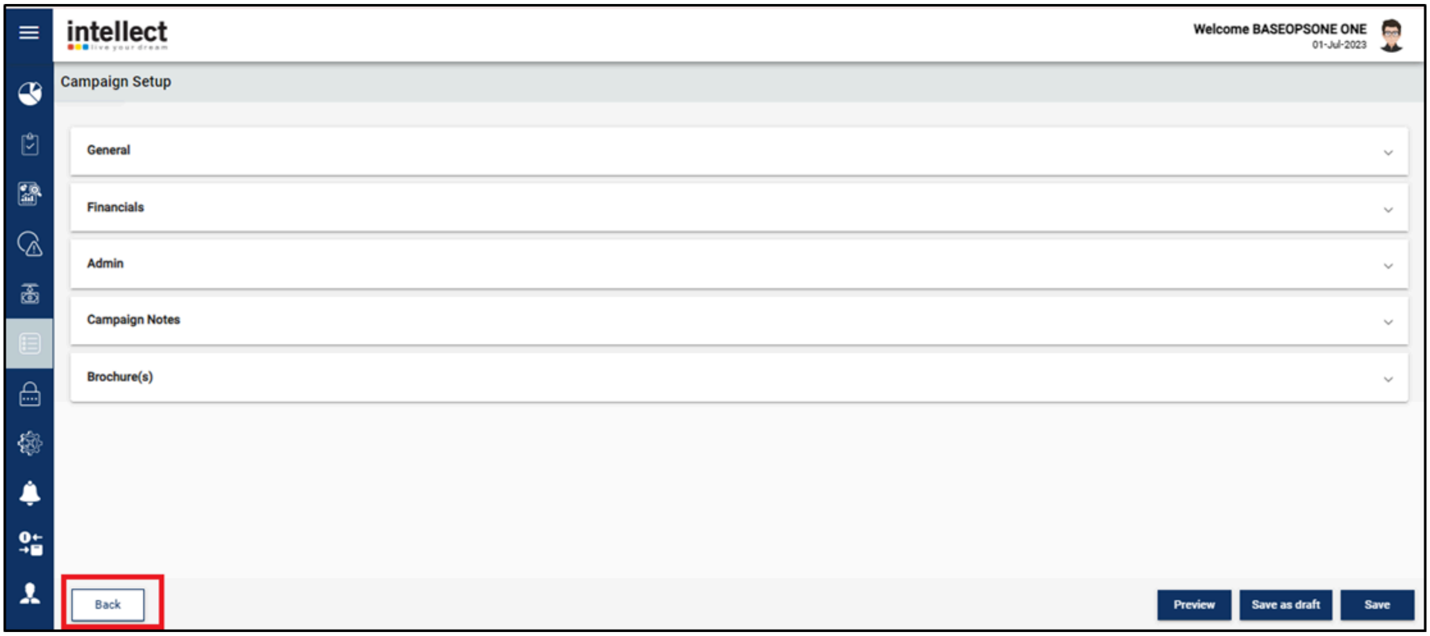
Screen: Save as Draft

iii. **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

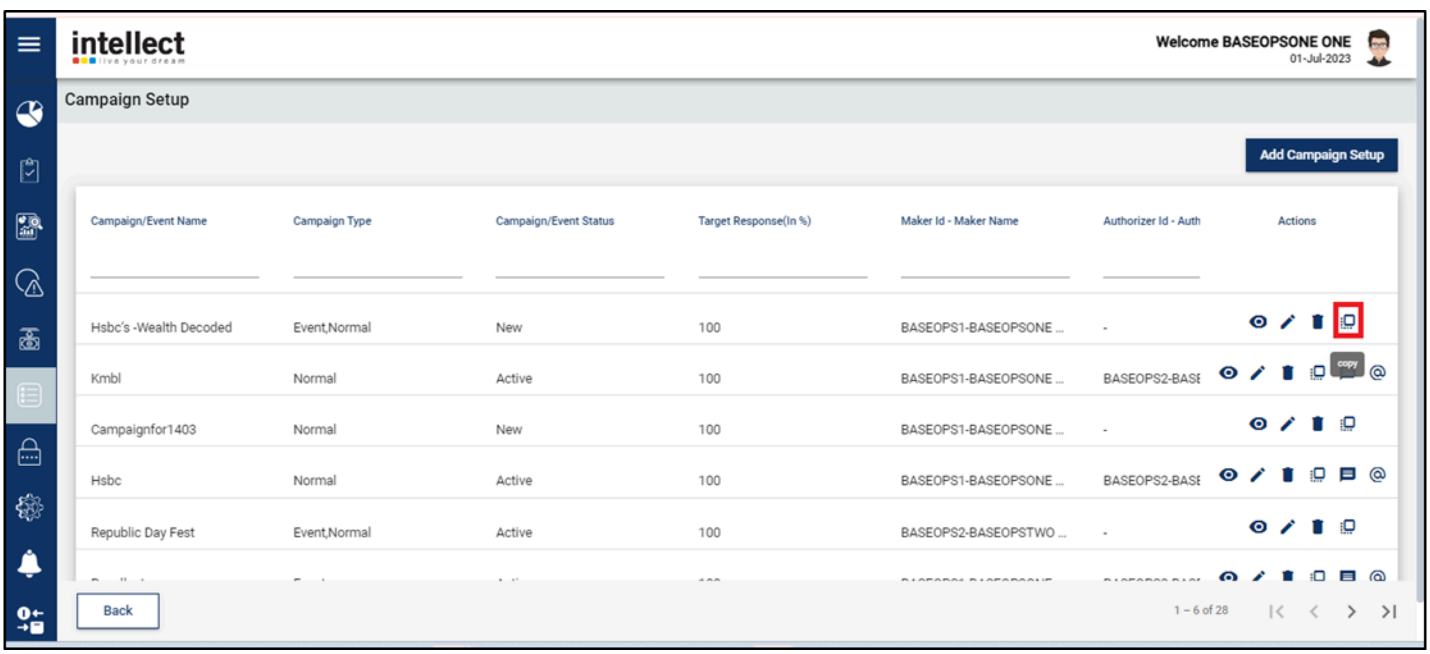
iv. **Back**- Click on the "Back" button on the subsequent overlay to navigate back to the Campaign Management screen



Screen: Back to Campaign List

4.3.3 Copy a Campaign

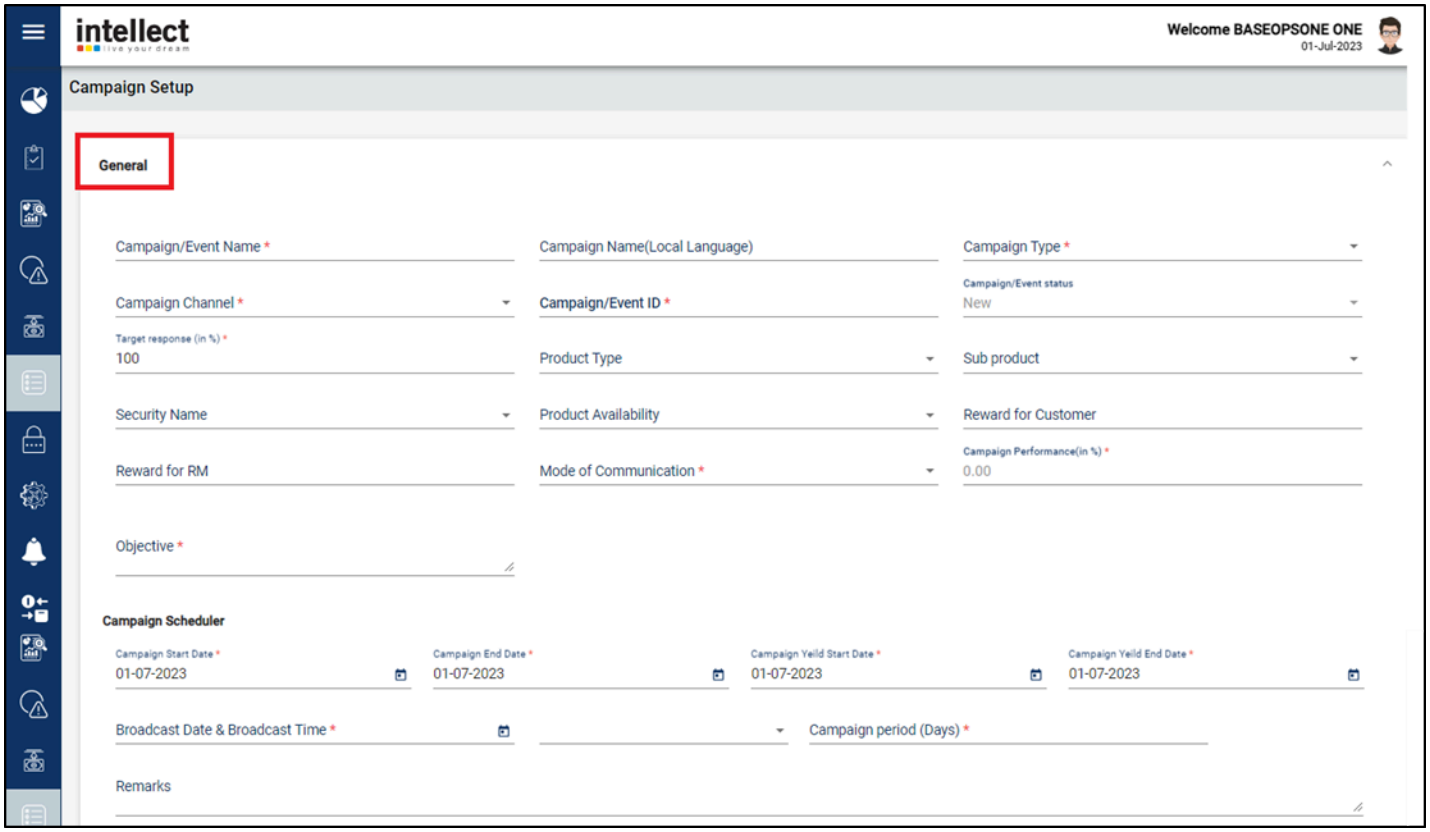
1. In the Campaign Management screen, the User clicks on the "Copy" button after selecting a campaign, to navigate to the Copy Campaign screen, where they can copy the details of existing campaigns to create a new campaign



Screen: Copy an Existing Campaign

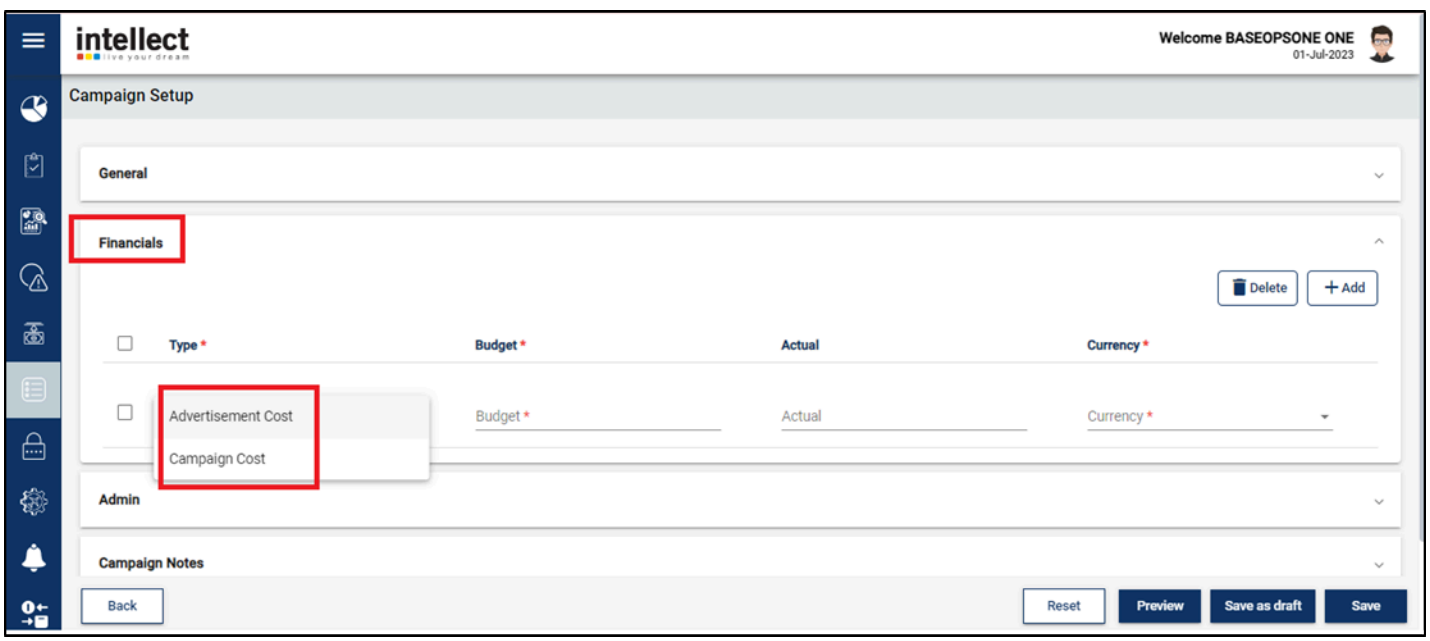
2. In the Copy Campaign screen, the User can navigate through the following tabs to capture campaign details:

a. **General** - Copy/Modify General Information such as Campaign Name, Channel etc.



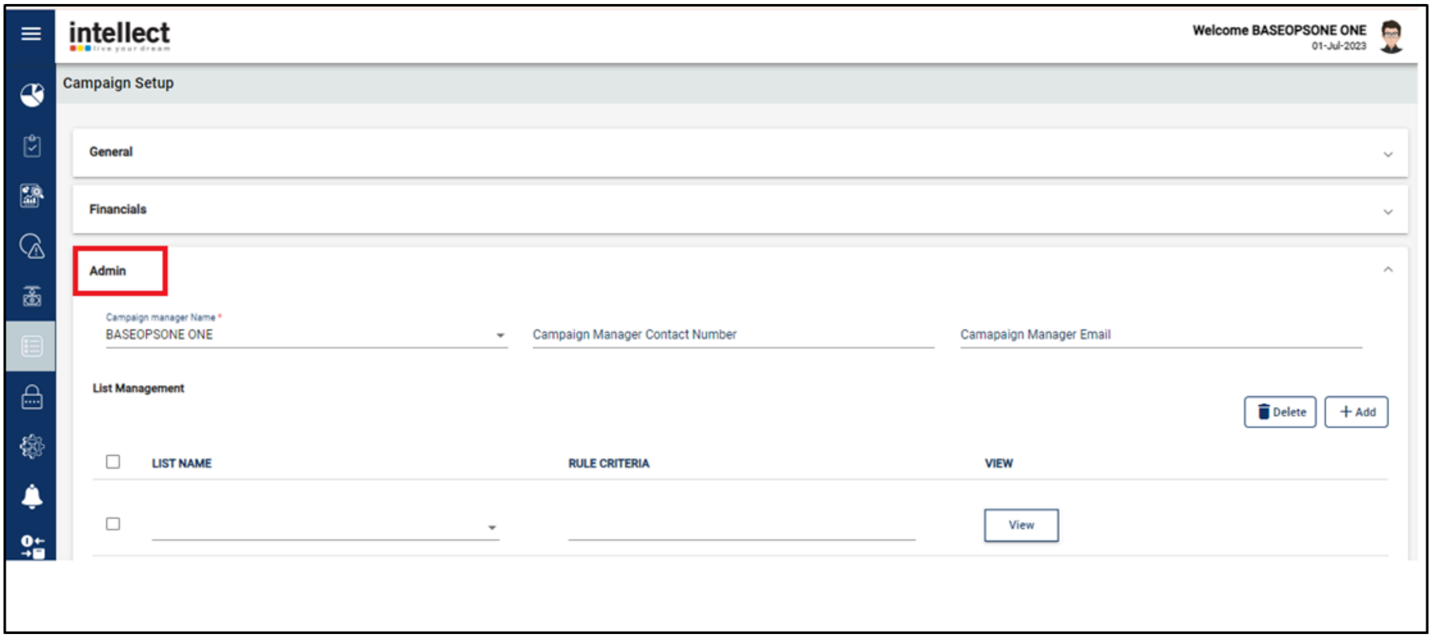
Screen: General Information

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



Screen: Financial Information

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

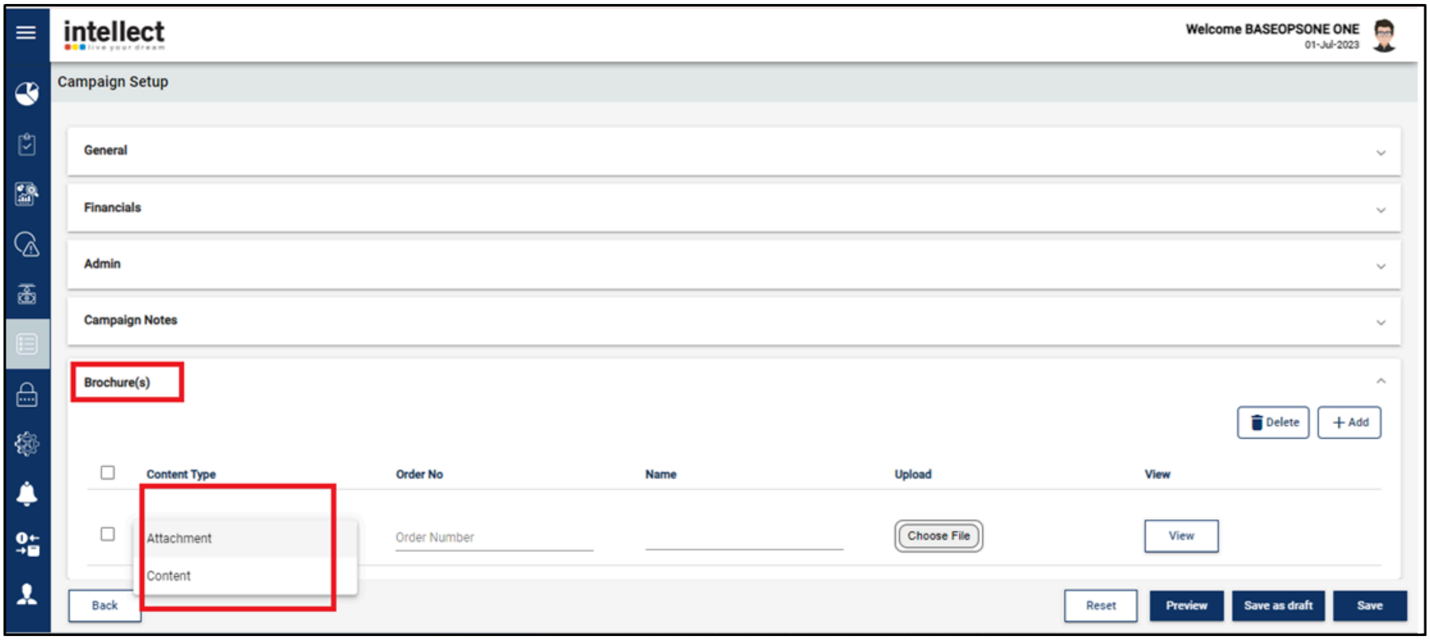


Screen: Admin details

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

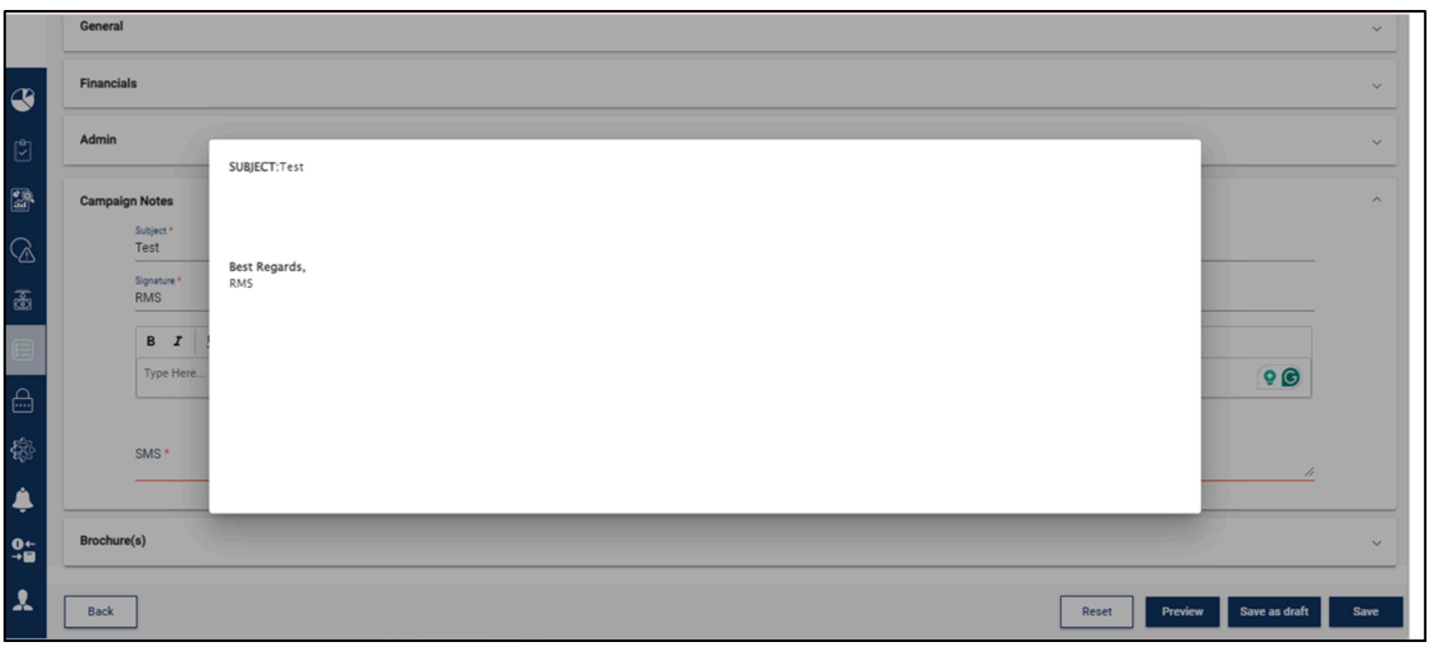
e. **Brochure** - Attach/Remove brochures related to the campaign



Screen: Attach/Remove Brochures

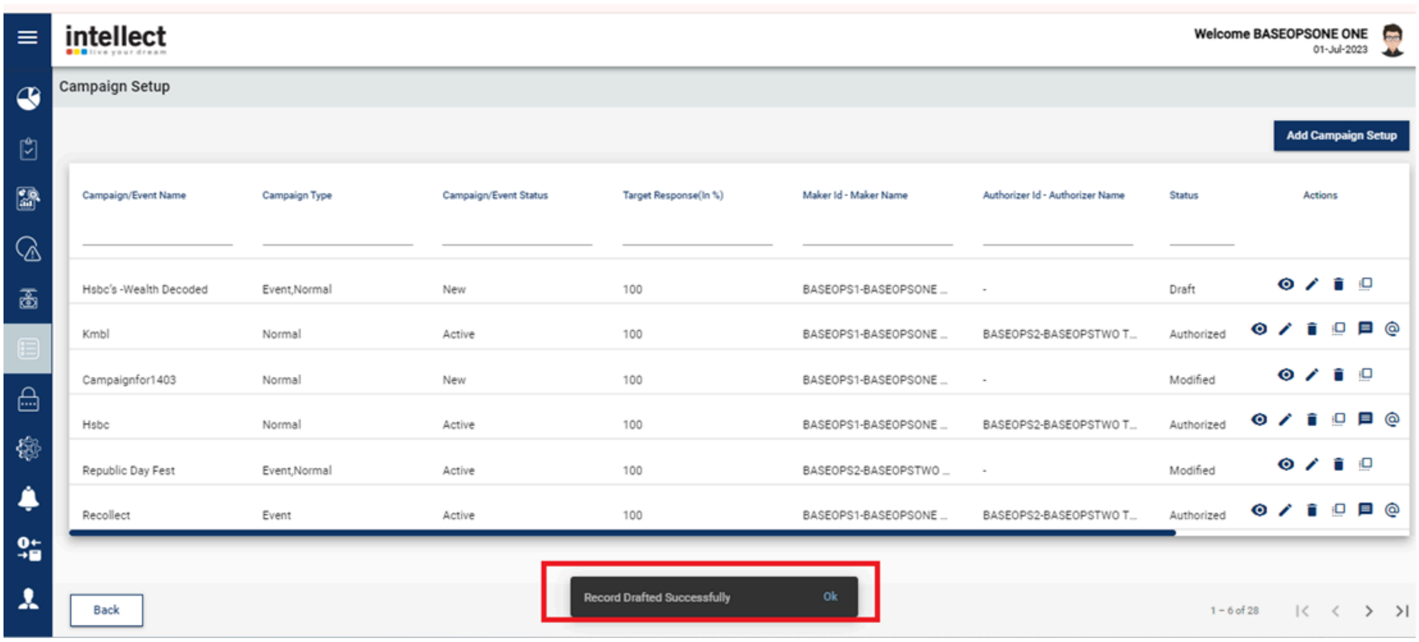
3. After the User has copied/modified all relevant details related to the campaign, they can perform the following actions:

    a. **Preview** - Click on the "Preview" button to view the Email details related to the campaign



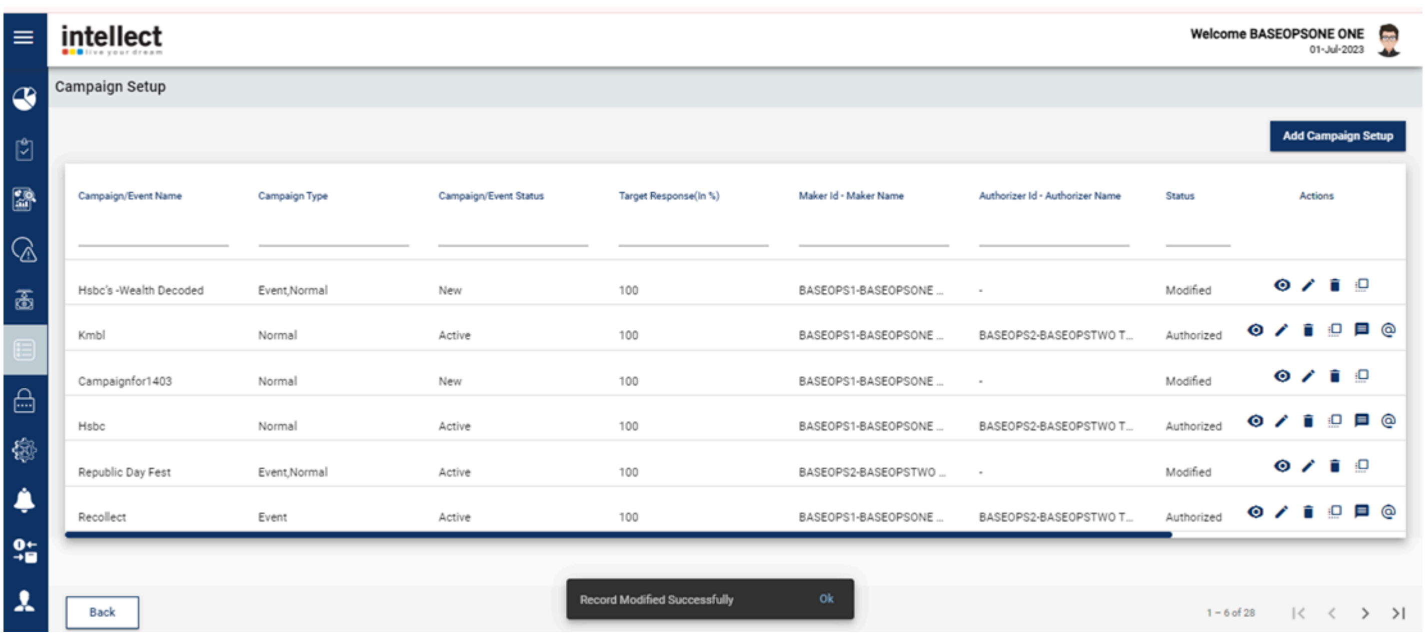
Screen: Preview Email

    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



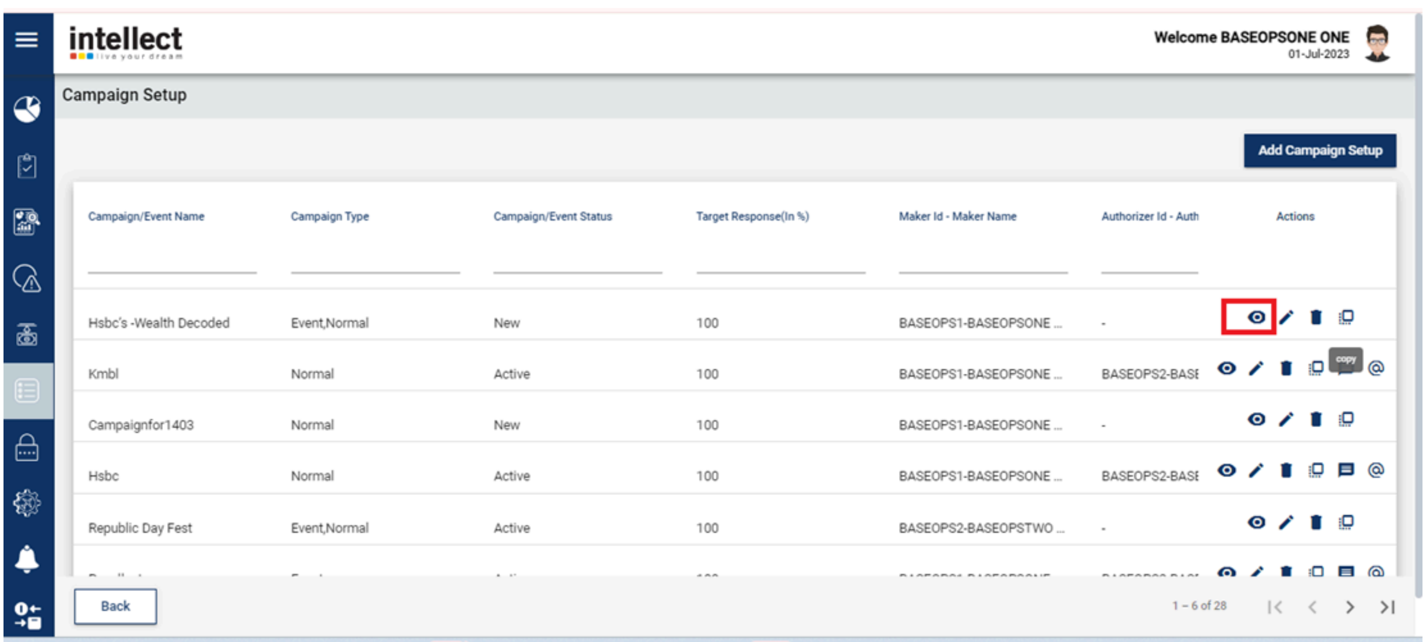
Screen: Save Campaign

d. **Back**- Click on the "Back" button on the subsequent overlay to navigate back to the Campaign Management screen

Screen: Back to Campaign List

4.3.4 View a Campaign

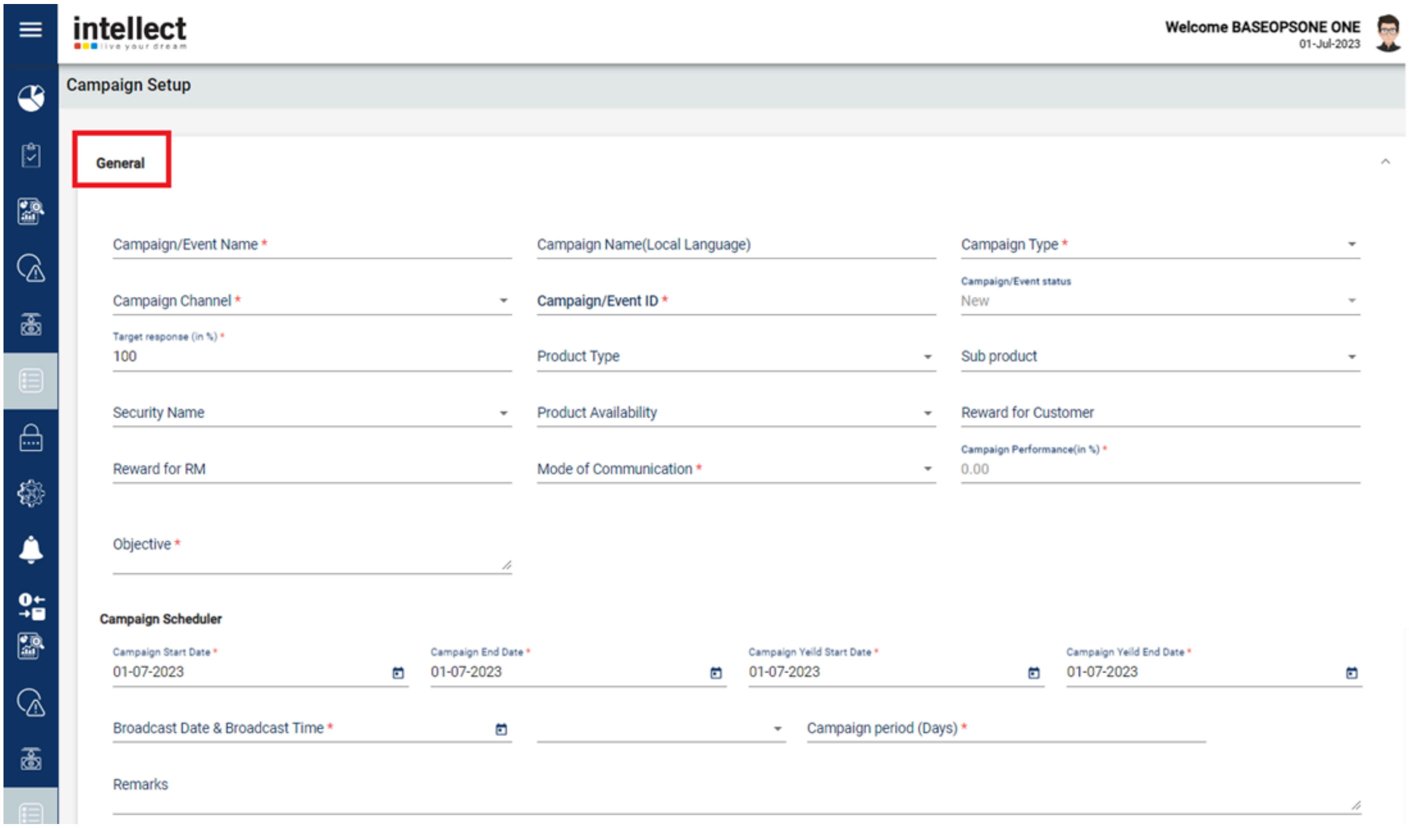
1. In the Campaign Management screen, the User clicks on the "View" button after selecting a campaign, to navigate to the View Campaign screen, where they can view campaign details



Screen: View Campaign

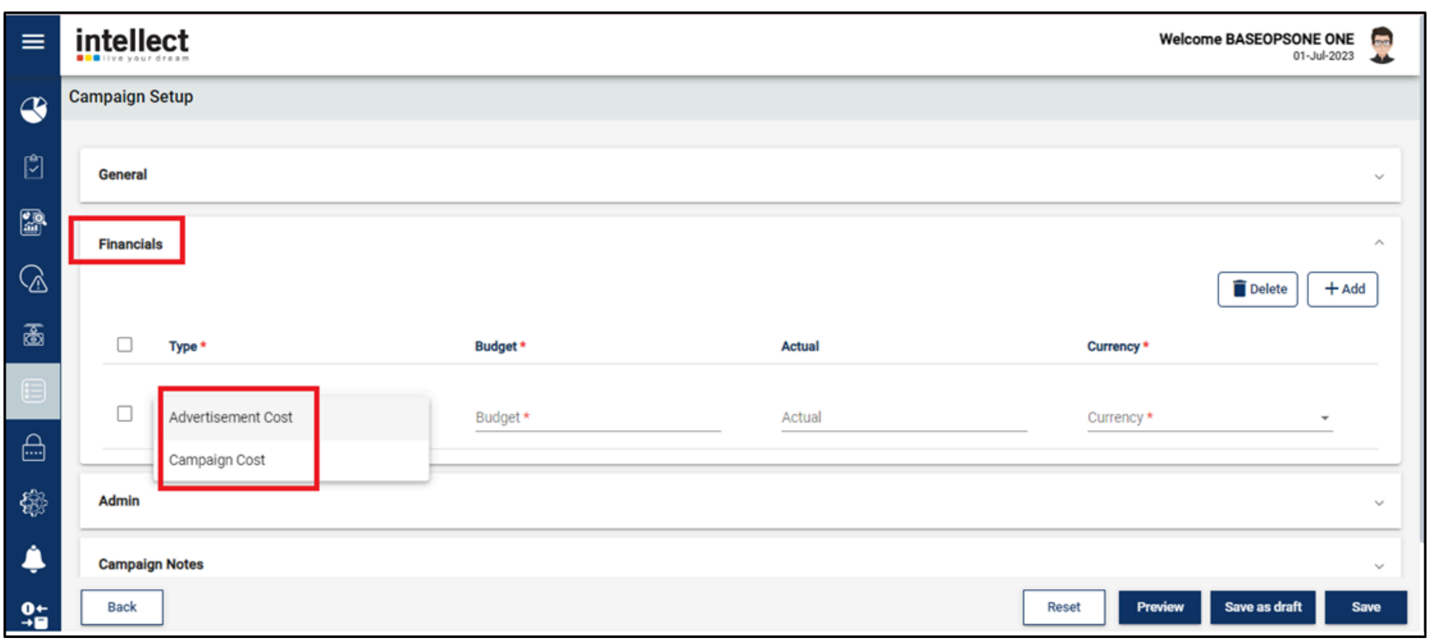
2. On the View Campaign screen, the User can navigate through the following tabs to view campaign details:

a. **General** - View General Information such as Campaign Name, Channel etc.



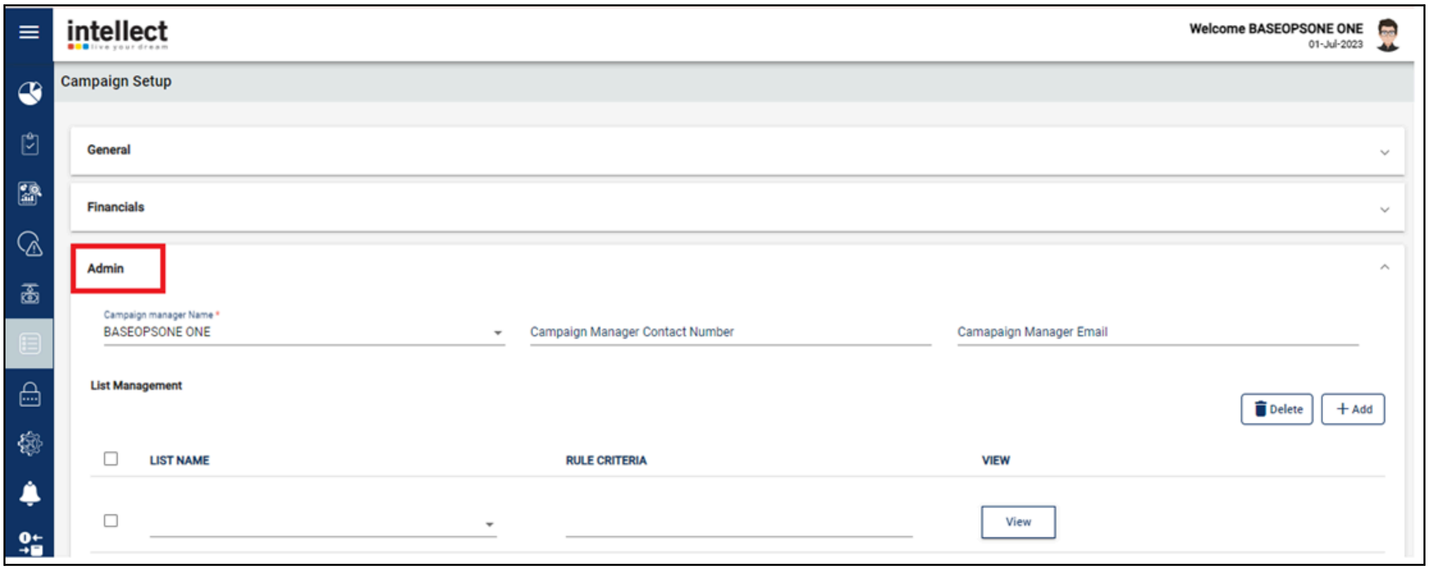
Screen: General Information

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



Screen: Financial Information

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

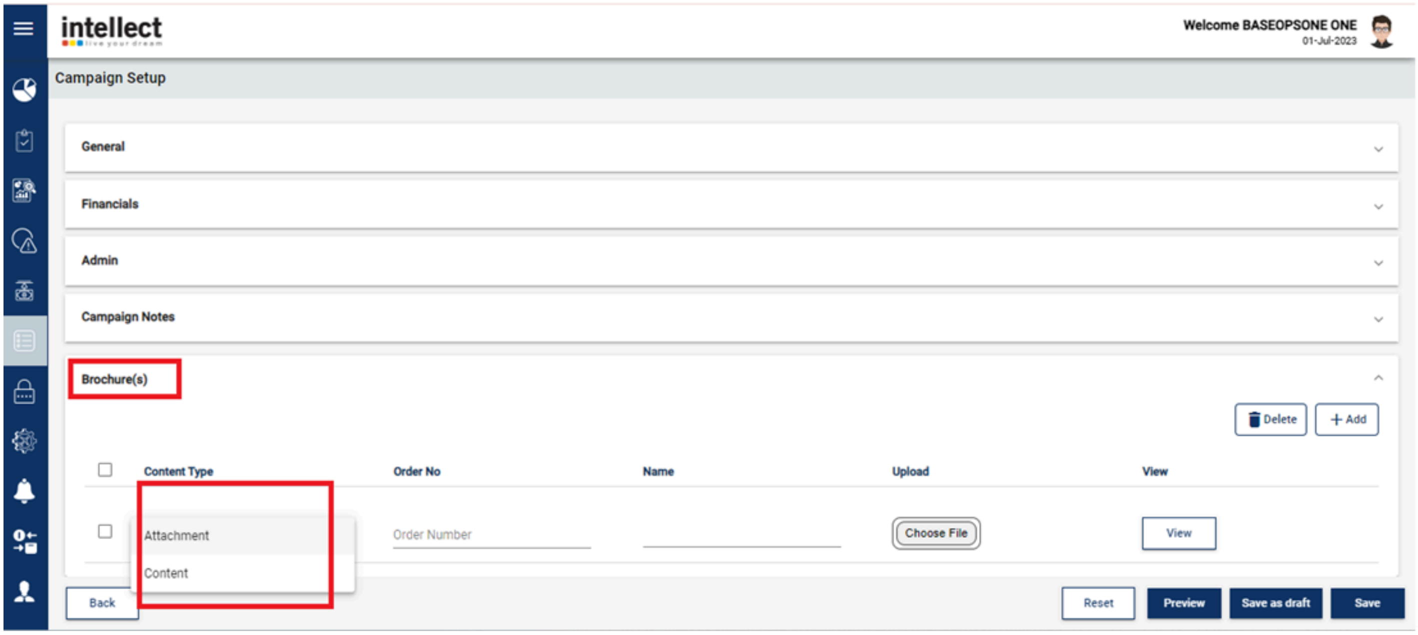


Screen: Admin details

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

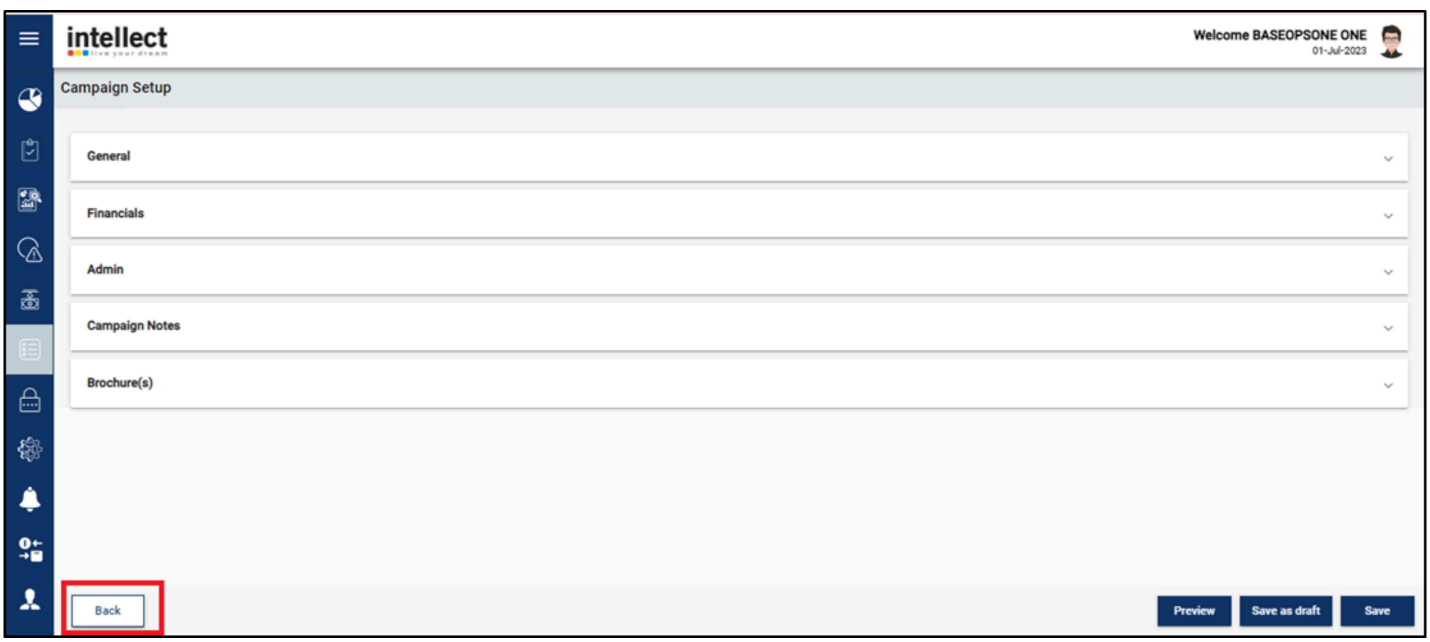
Screen: Campaign Notes

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



Screen: Attach/Remove Brochures

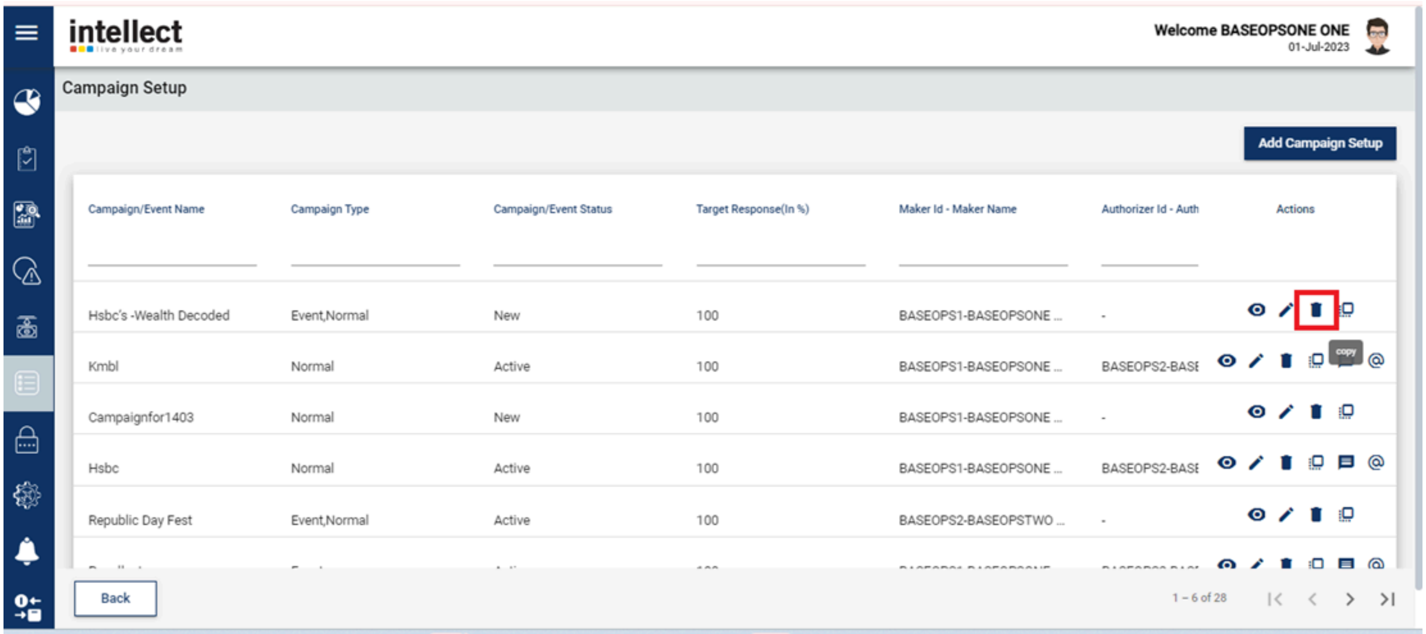
3. After the User has viewed all relevant details in the campaign, they can click on the "Back" button to navigate back to the Campaign Management screen



Screen: Back to Campaign List

4.3.5 Delete a Campaign

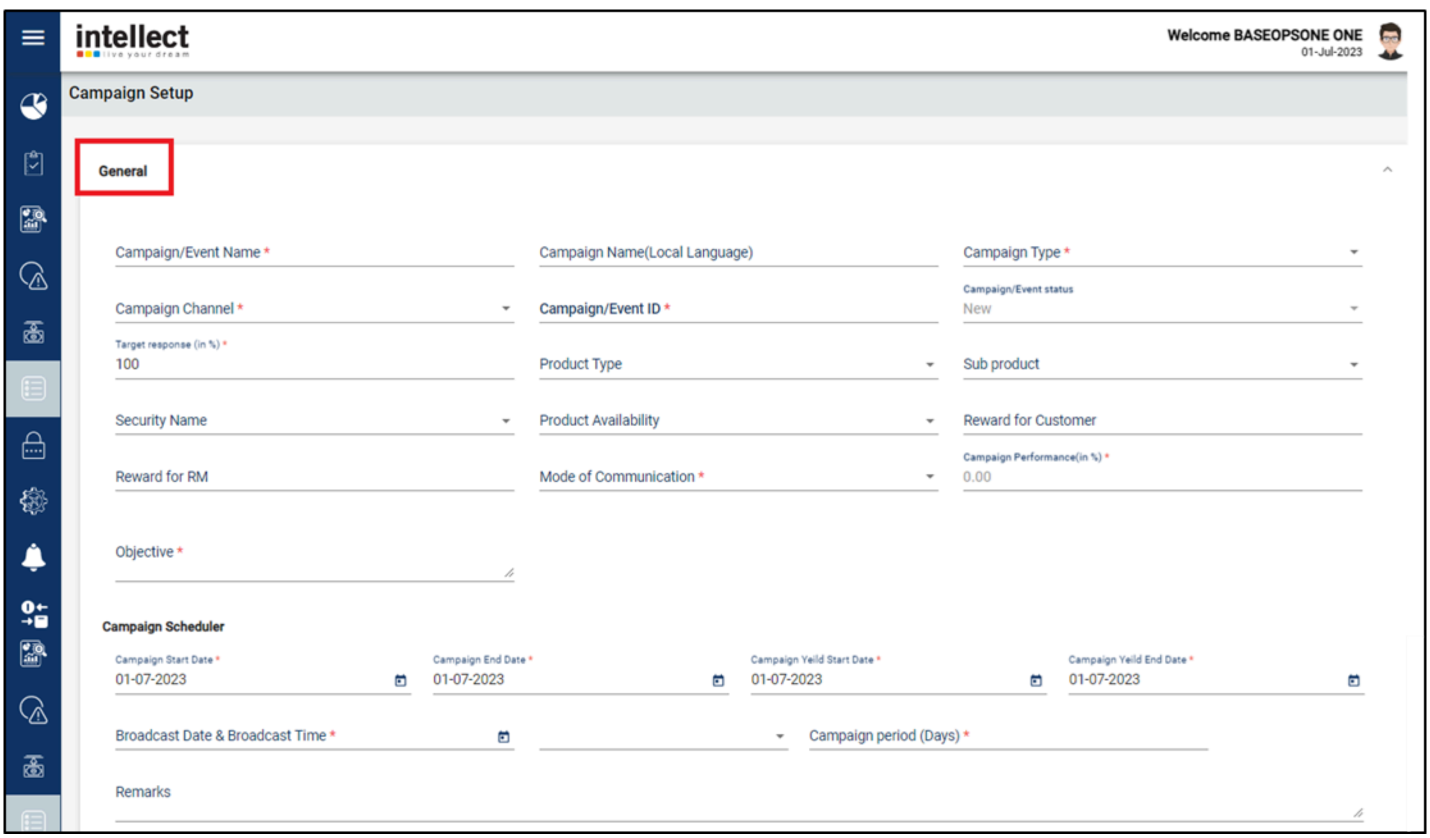
1. On the Campaign Management screen, the User clicks on the "Delete" button after selecting a campaign, to navigate to the Delete Campaign screen, where they can delete the unauthorized campaigns



Screen: Delete Campaign

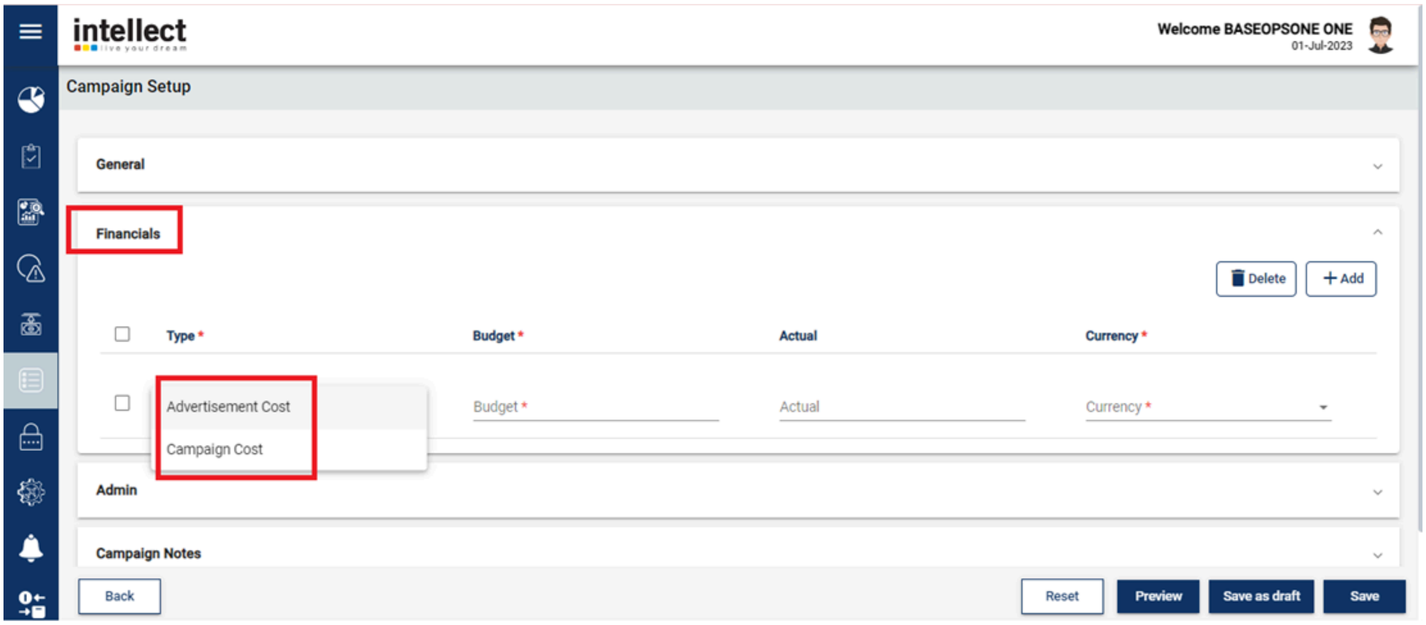
2. On the Delete Campaign screen, the User can navigate through the following tabs to view campaign details:

    a. **General** - View General Information such as Campaign Name, Channel etc.



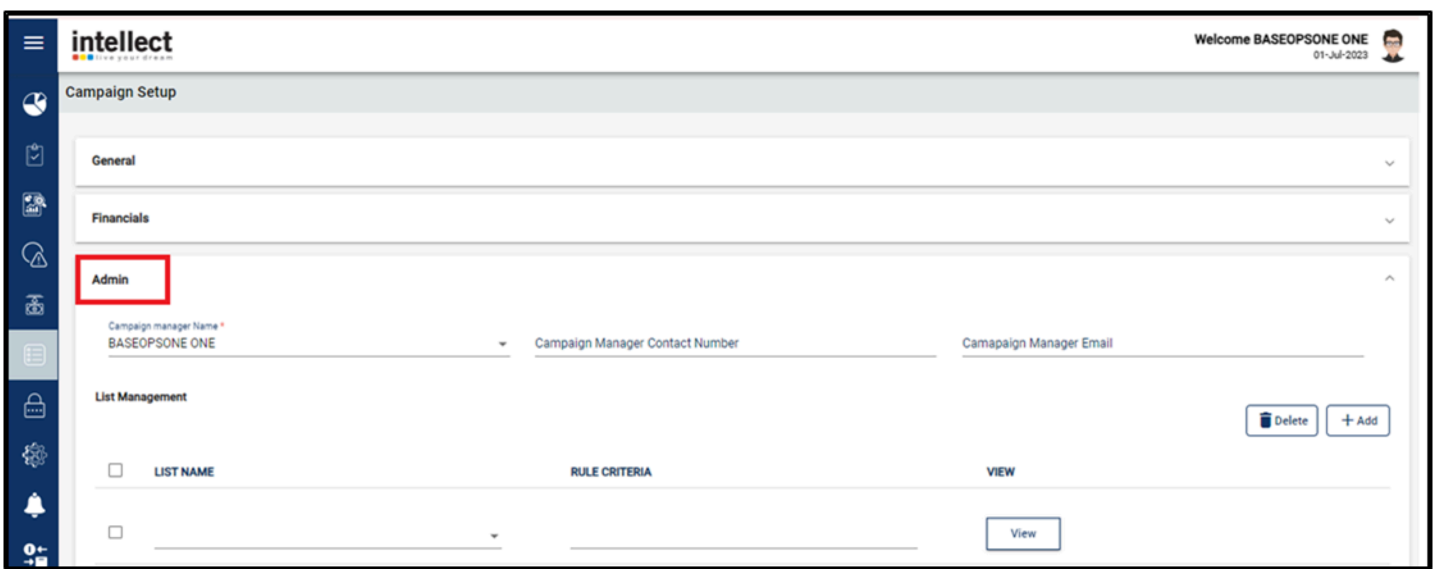
Screen: General Information

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



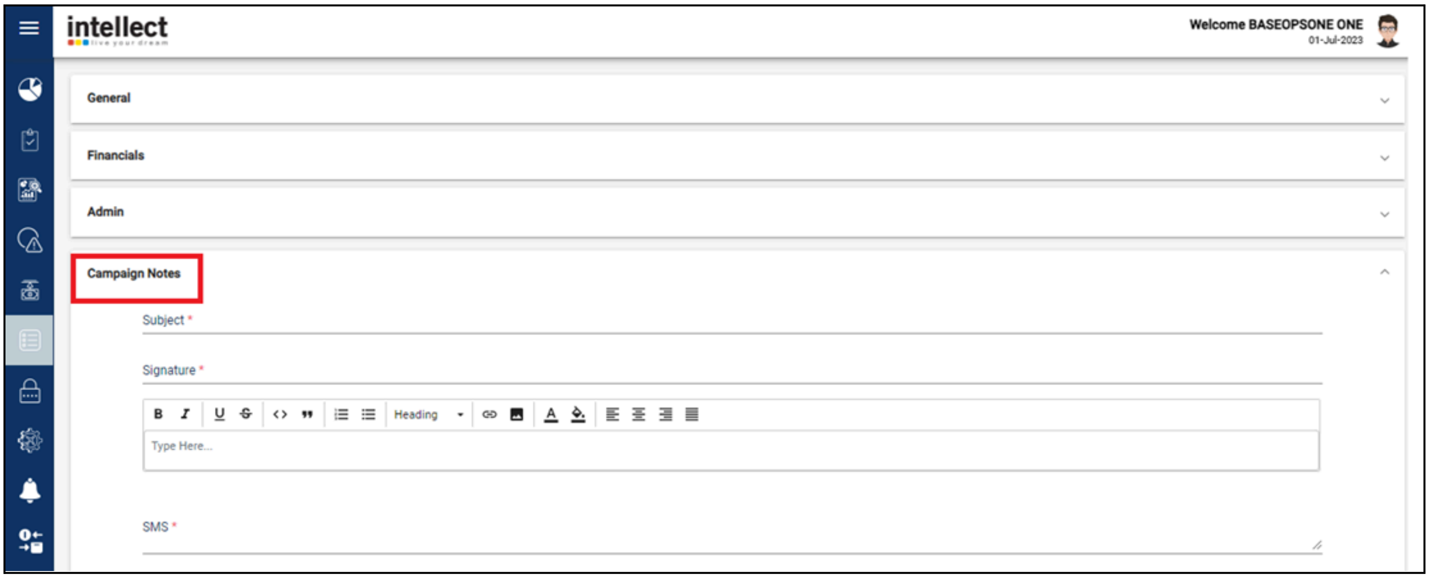
Screen: Financial Information

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



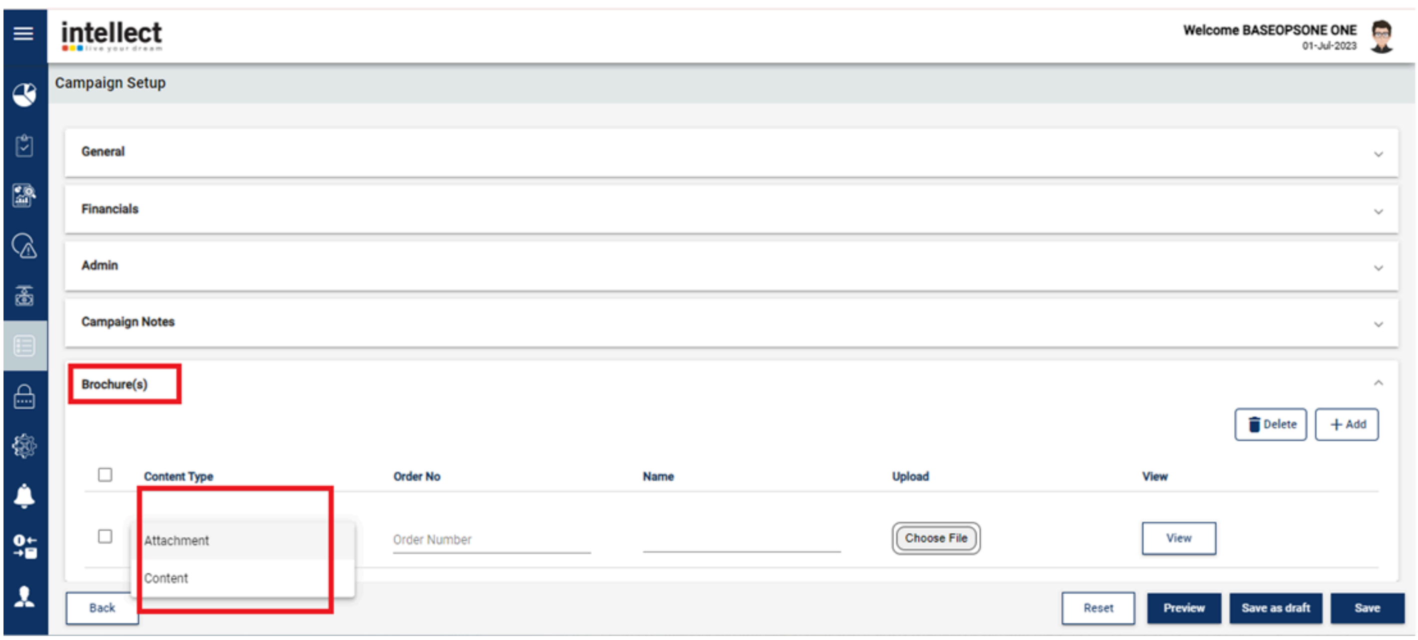
Screen: Admin details

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



Screen: Campaign Notes

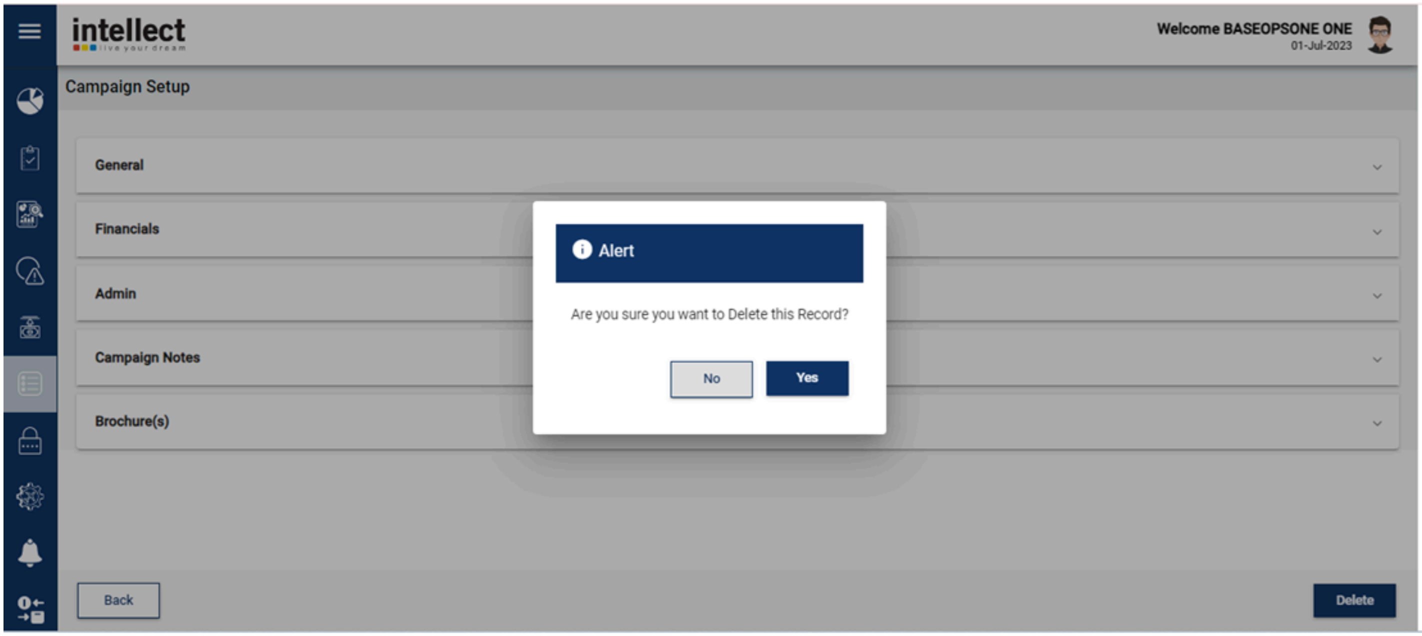
e. **Brochure** - View brochures related to the campaign



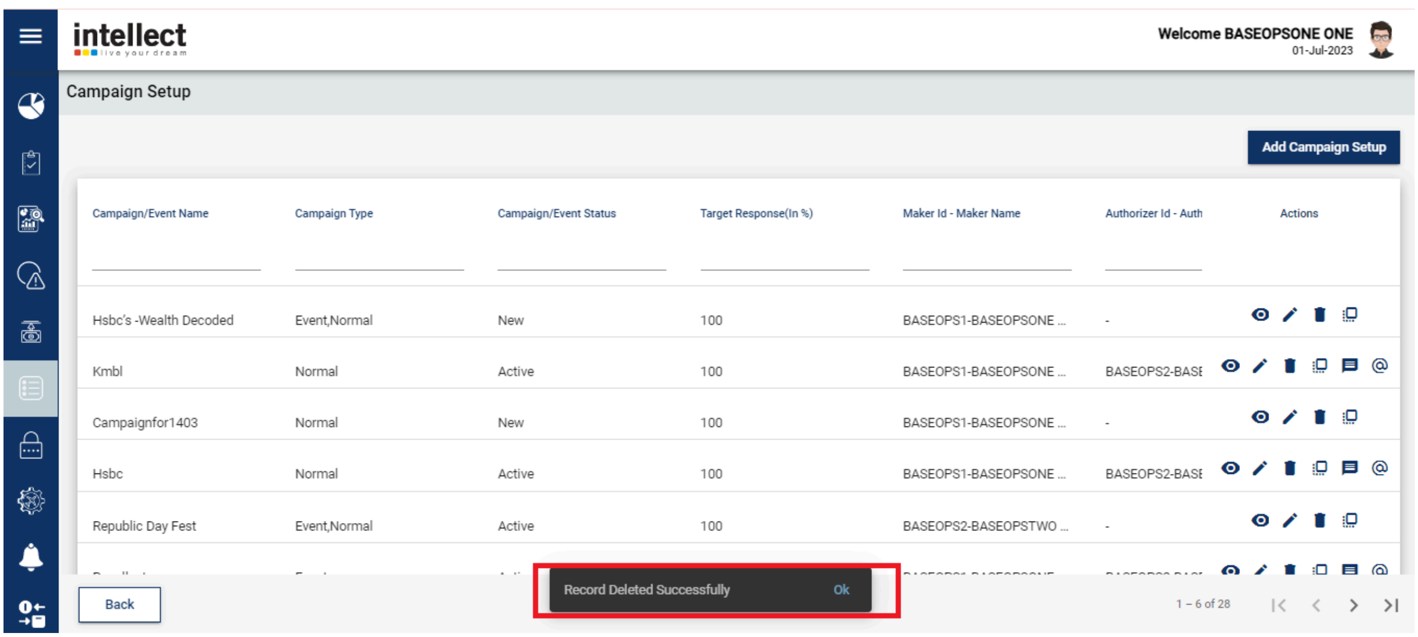
Screen: Brochures

f. After the User has viewed all relevant details in the campaign, they can perform the following actions:

i. **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

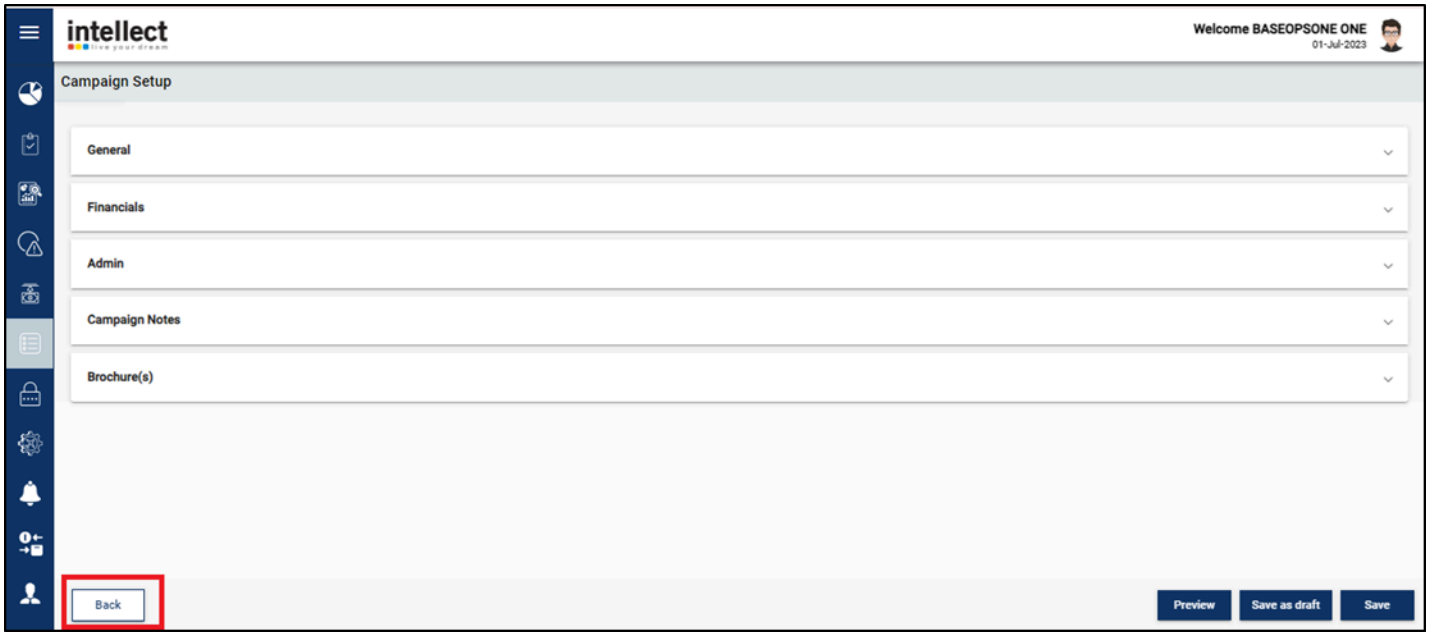


Screen: Delete Campaign



Screen: Campaign successfully deleted

ii. **Back**- Click on the "Back" button on the subsequent overlay to navigate back to the Campaign Management screen

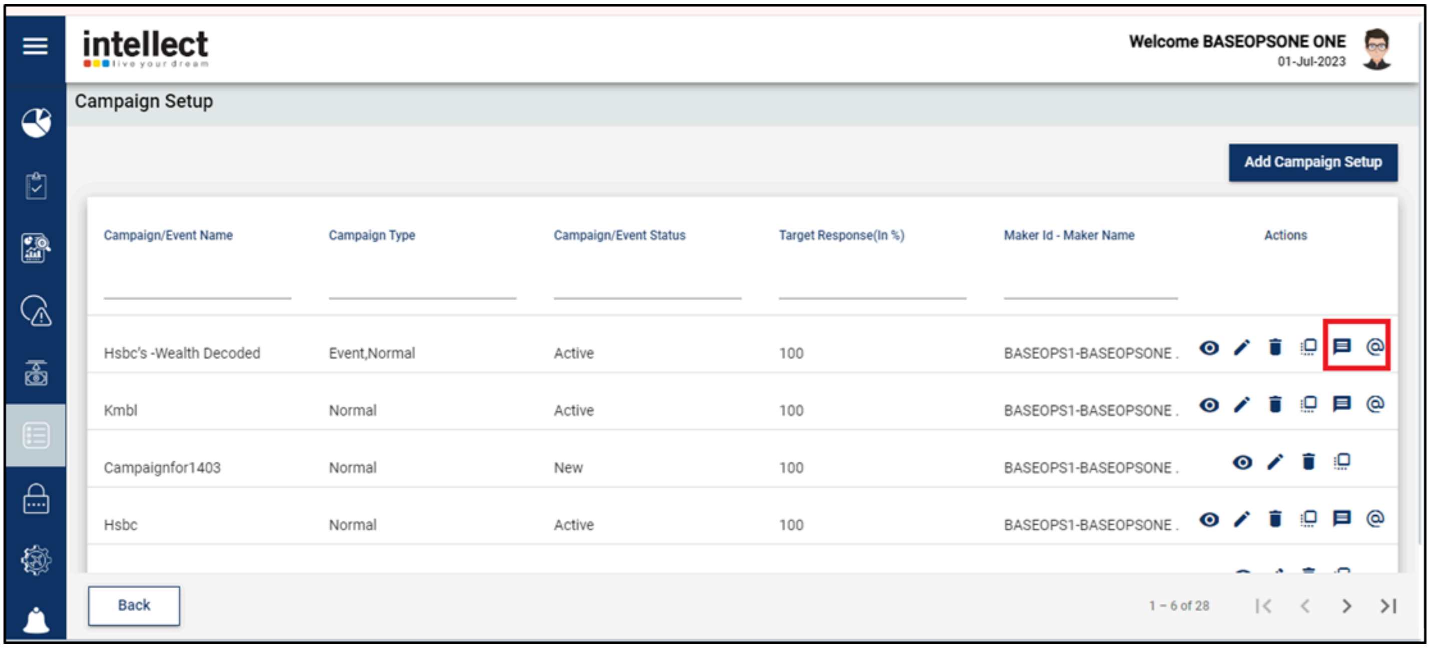


Screen: Back to Campaign List

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 clicking on the respective communication button

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



Screen: Campaign Communication – Send Mail/Send SMS

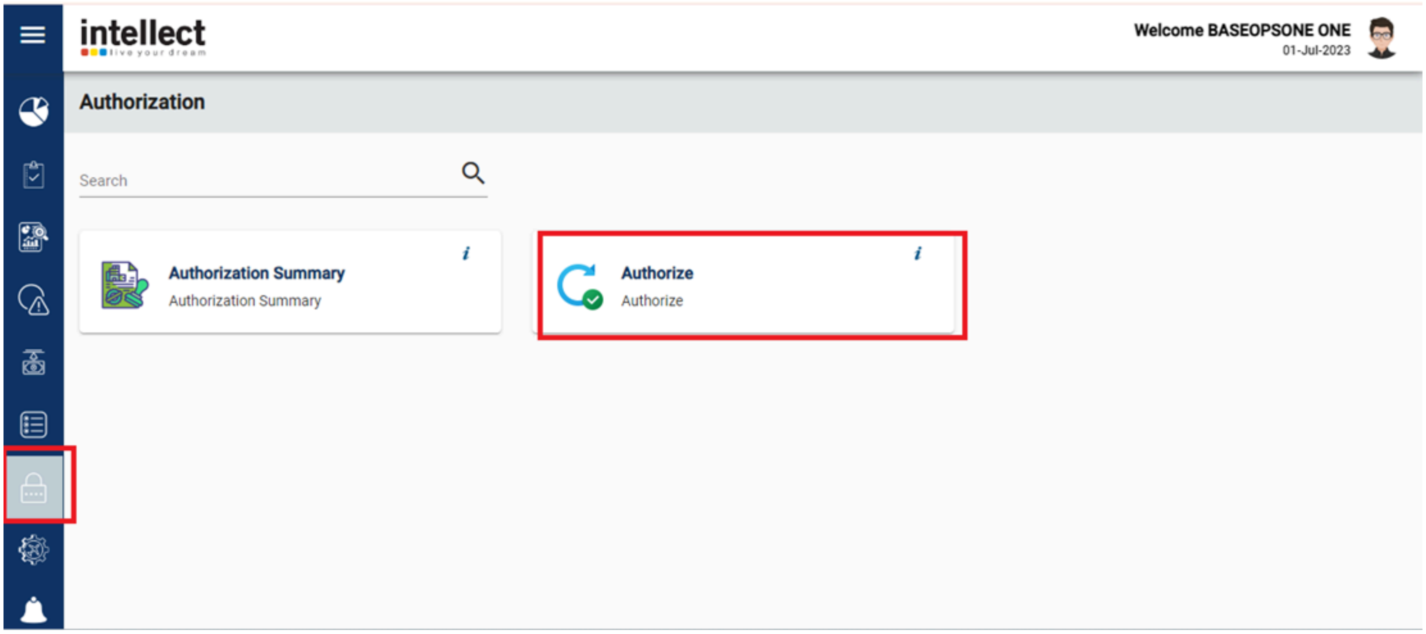
3. Broadcast status will be shown by the system for Send Mail/Send SMS and a pop-up will be displayed as “Email Notification Process Triggered/SMS Notification Process Triggered.”

4.3.7 Supervisor Approval

A Campaign would need to be approved by the Supervisor in the following cases:

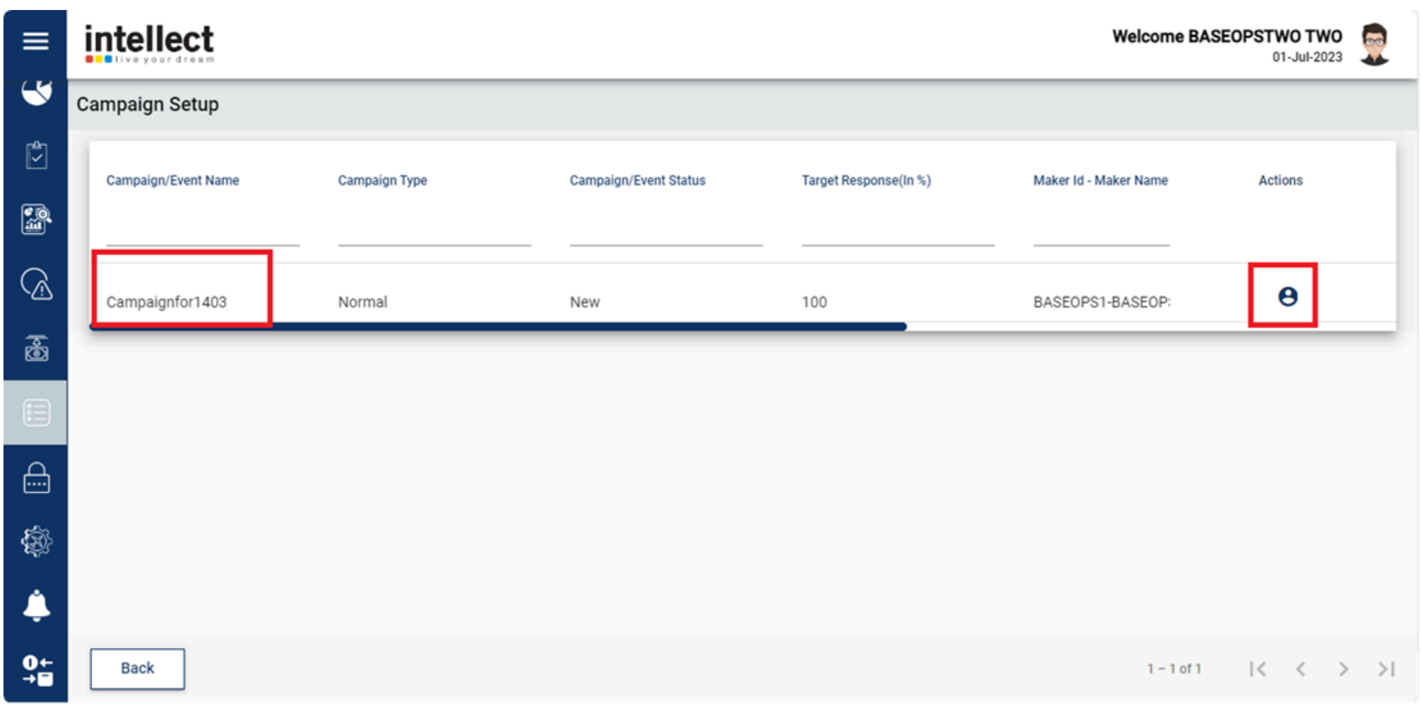
a. Define a New Campaign
b. Modify an Existing Campaign
c. Copy a Campaign

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



Screen: Click on Authorize

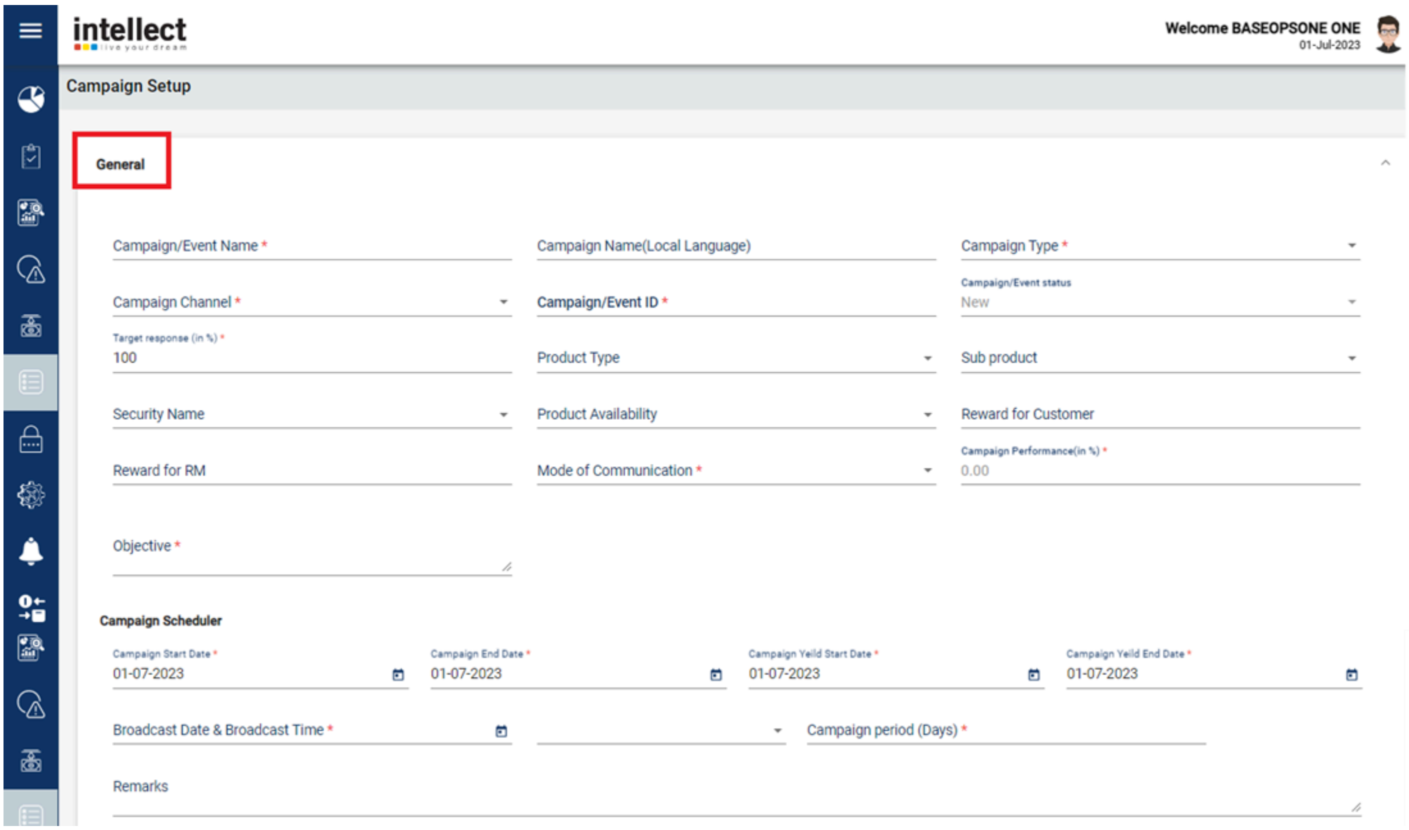
2. Once on the Authorize screen, the Supervisor then needs to select the “Campaign Management” option from the Authorize Unit dropdown to navigate to the Authorize Campaign screen



Screen: Select Campaign Management

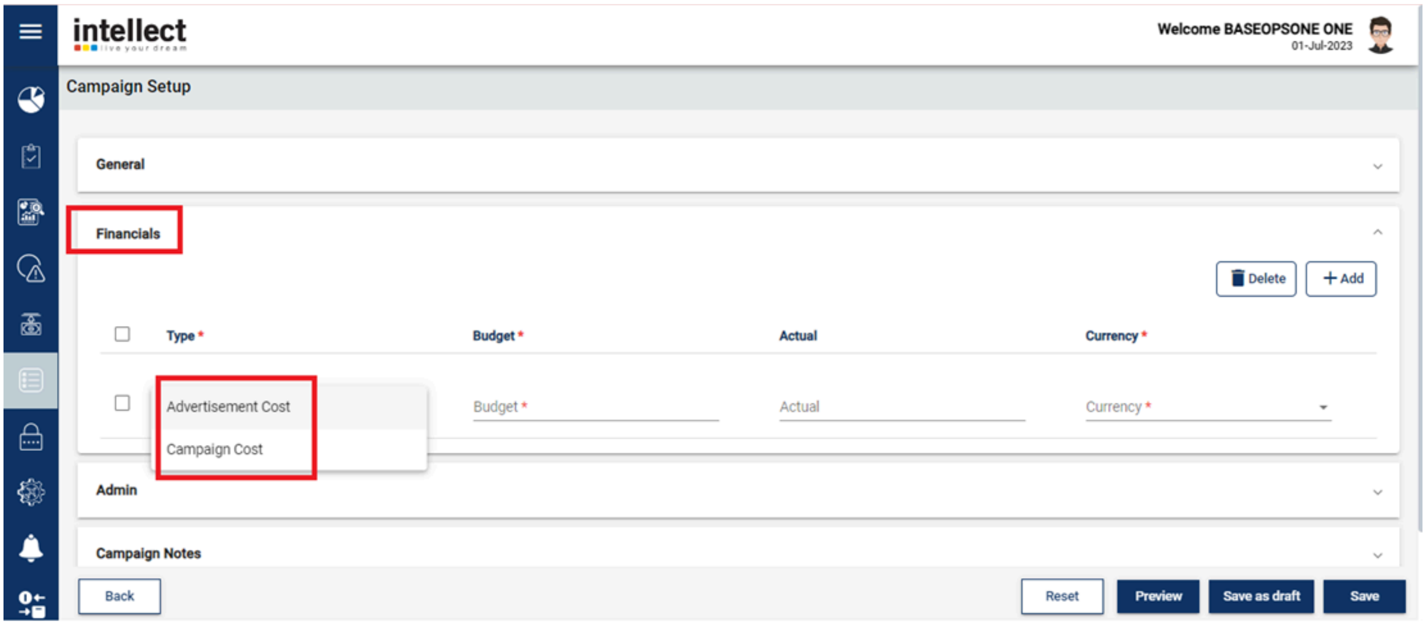
3. The Supervisor can select any Campaign and click on the “Authorize/Reject” button to view the selected campaign details and Authorize/Reject the same

4. 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.



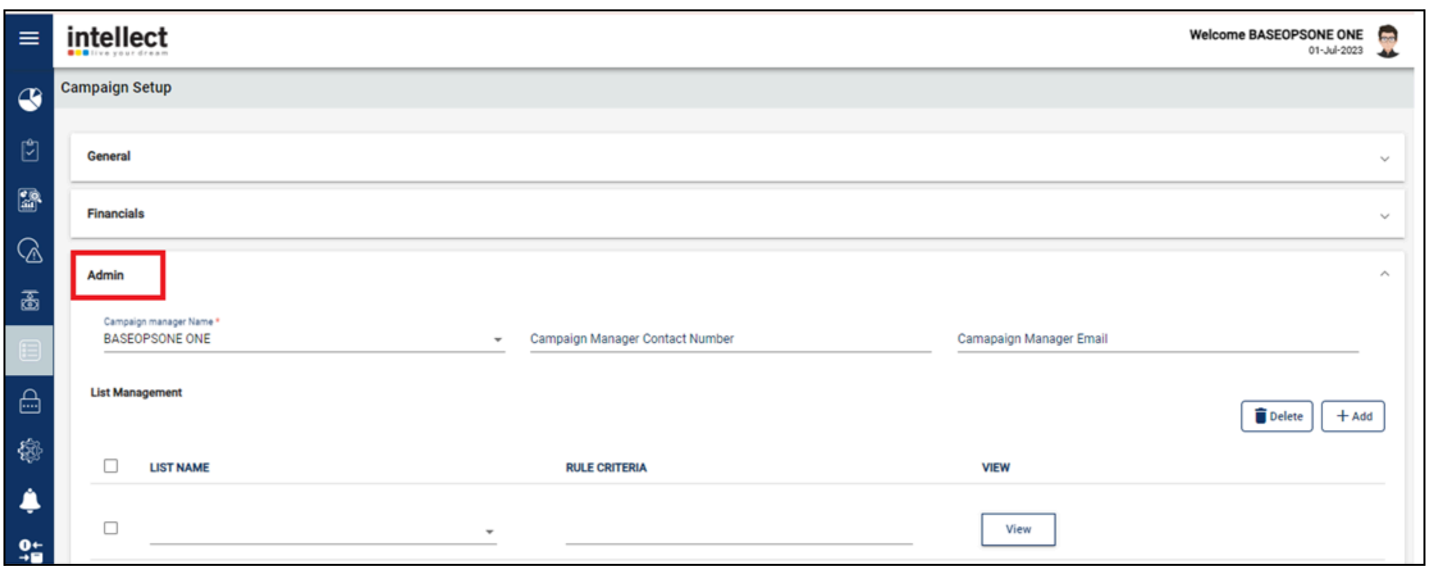
Screen: Campaign General Details

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



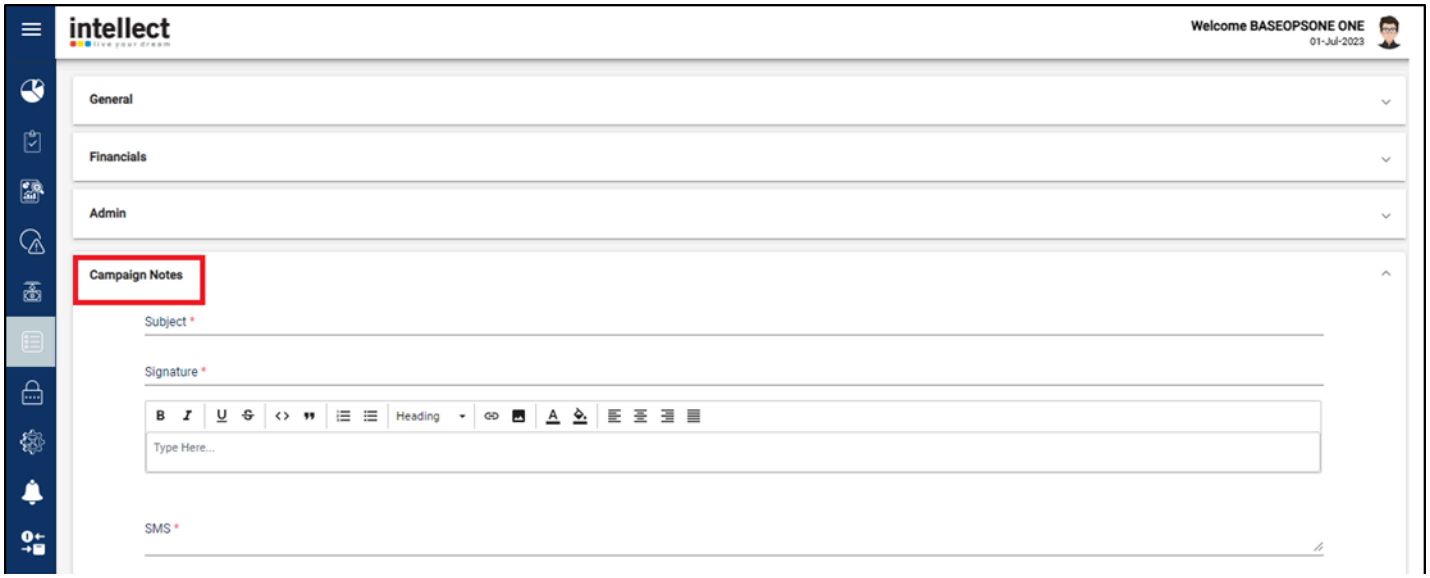
Screen: Campaign Financials

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



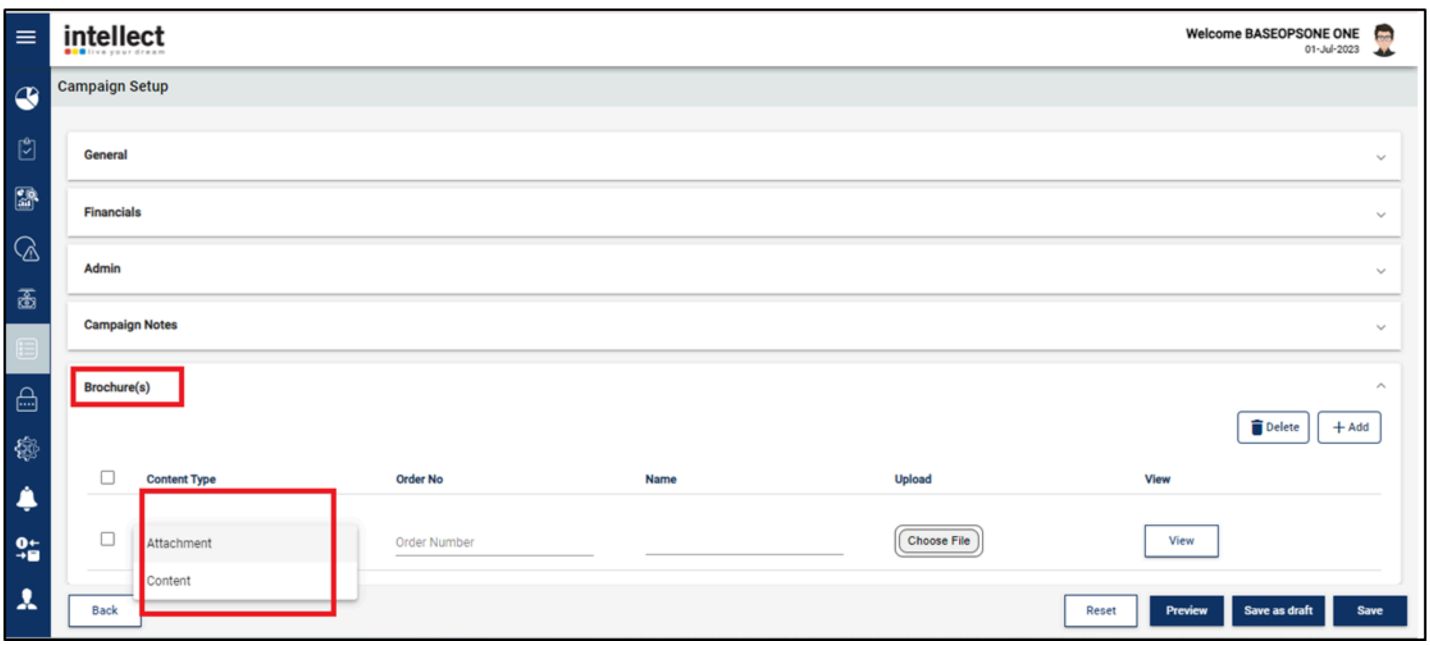
Screen: Campaign Admin details

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



Screen: Campaign Notes

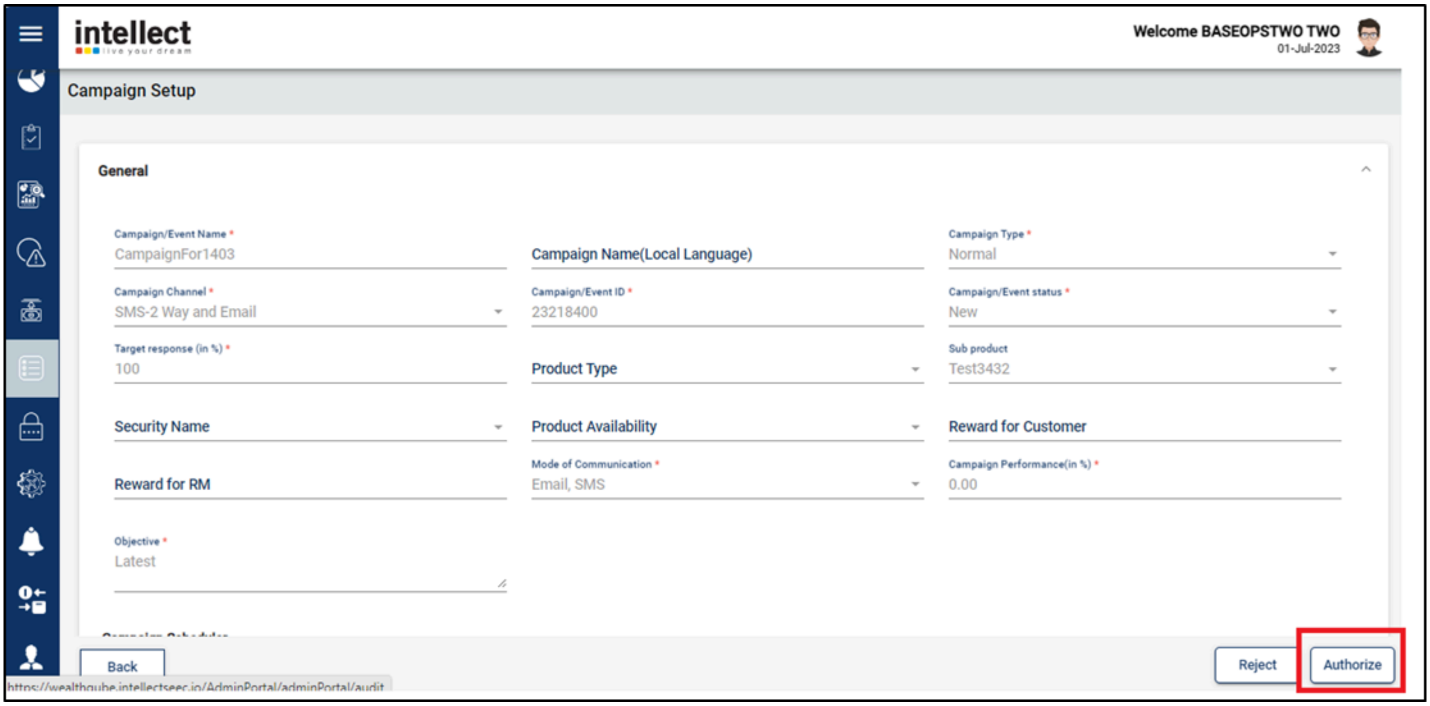
e. **Brochure** - View brochures related to the campaign



Screen: Brochures

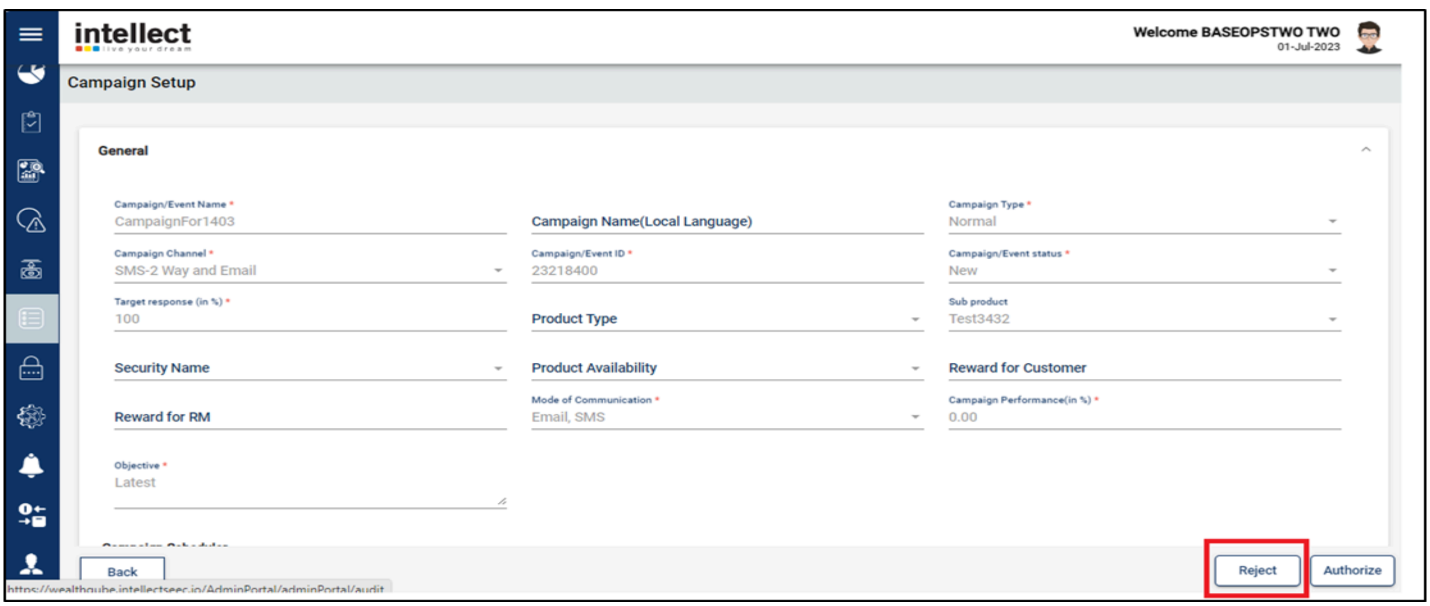
f. After Viewing the Campaign details, the Supervisor can do the following:

   i. **Authorize** - Click on the “Authorize” button to approve the campaign



Screen: Authorize the Campaign

ii. **Reject** - Click on the "Reject" button to capture the Rejection Reason, and subsequently on the "Reject" button on the overlay to reject the Campaign

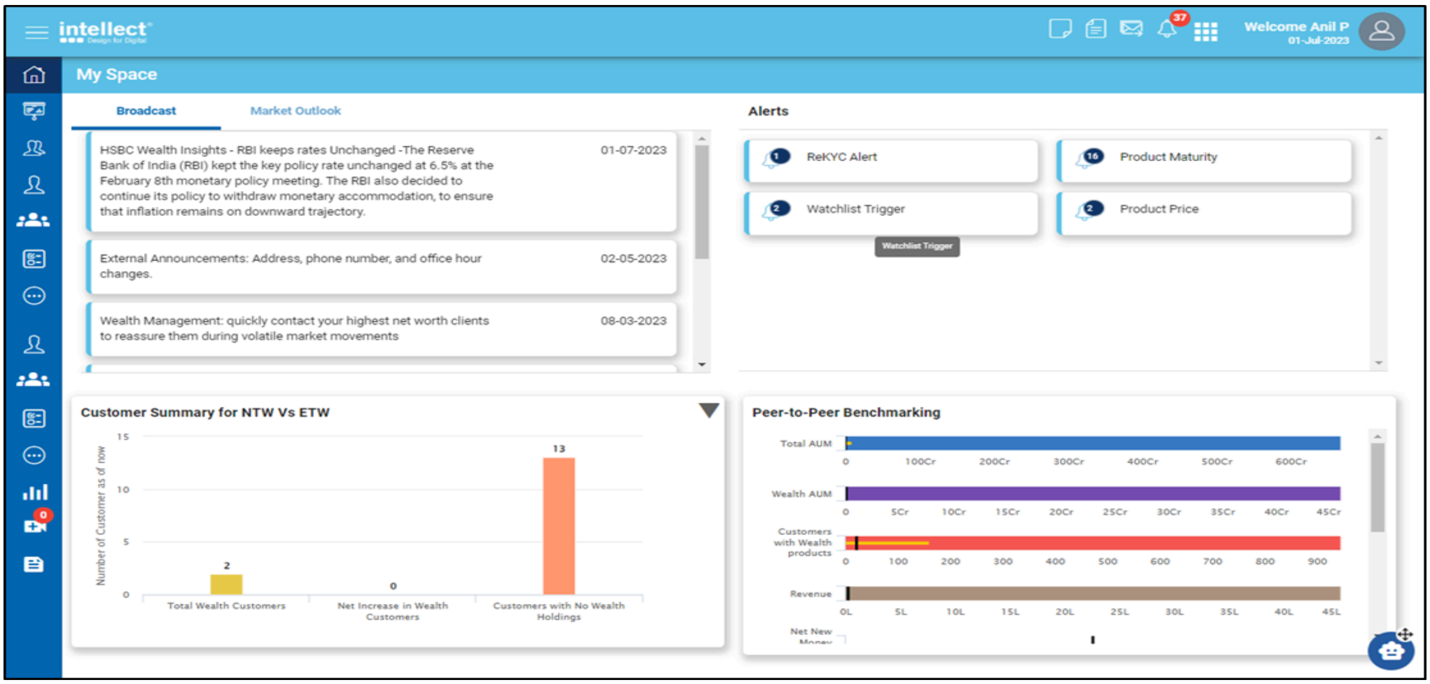


Screen: Reject the Campaign and capture Reject Reason

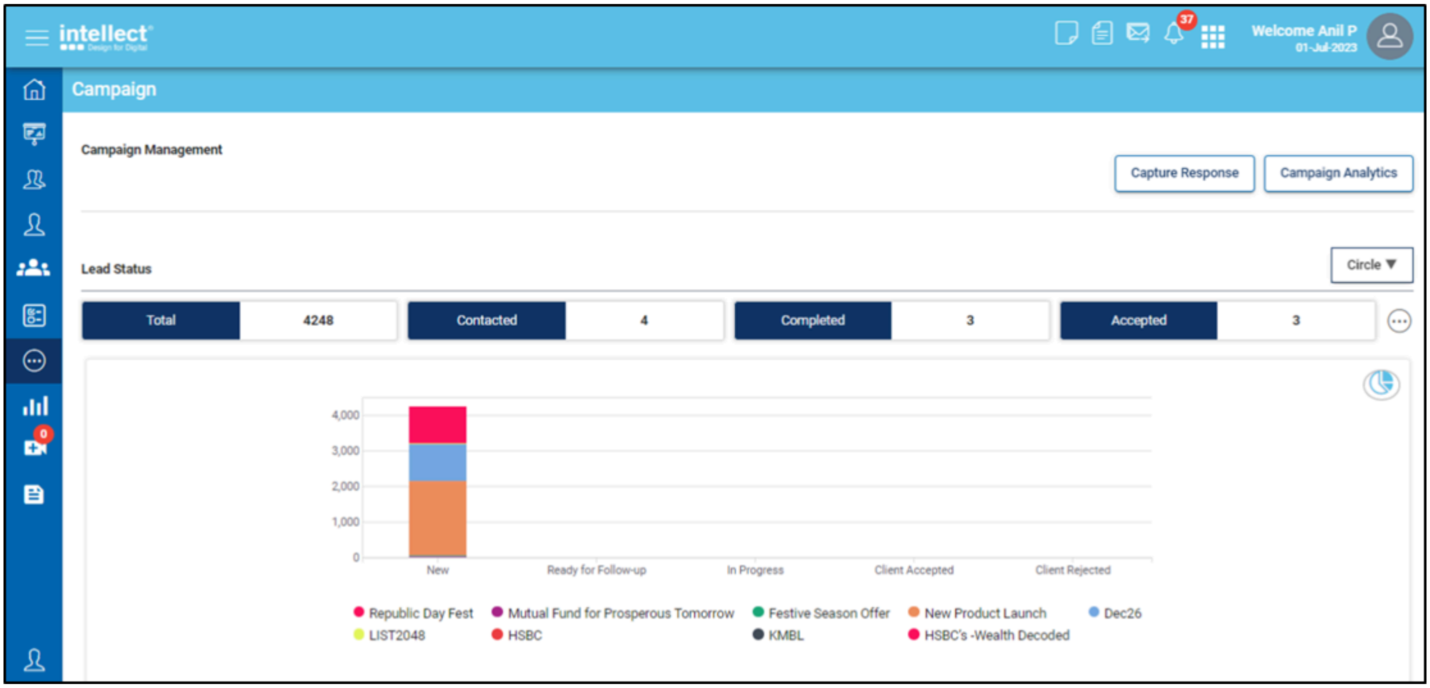
4.3.8 View Campaign Dashboard

1. The Campaign Dashboard can be accessed from the RM Office Module. Once the User has logged into RM office, they can navigate to the Campaign Dashboard by clicking on the Campaign Management widget on the left panel. In 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

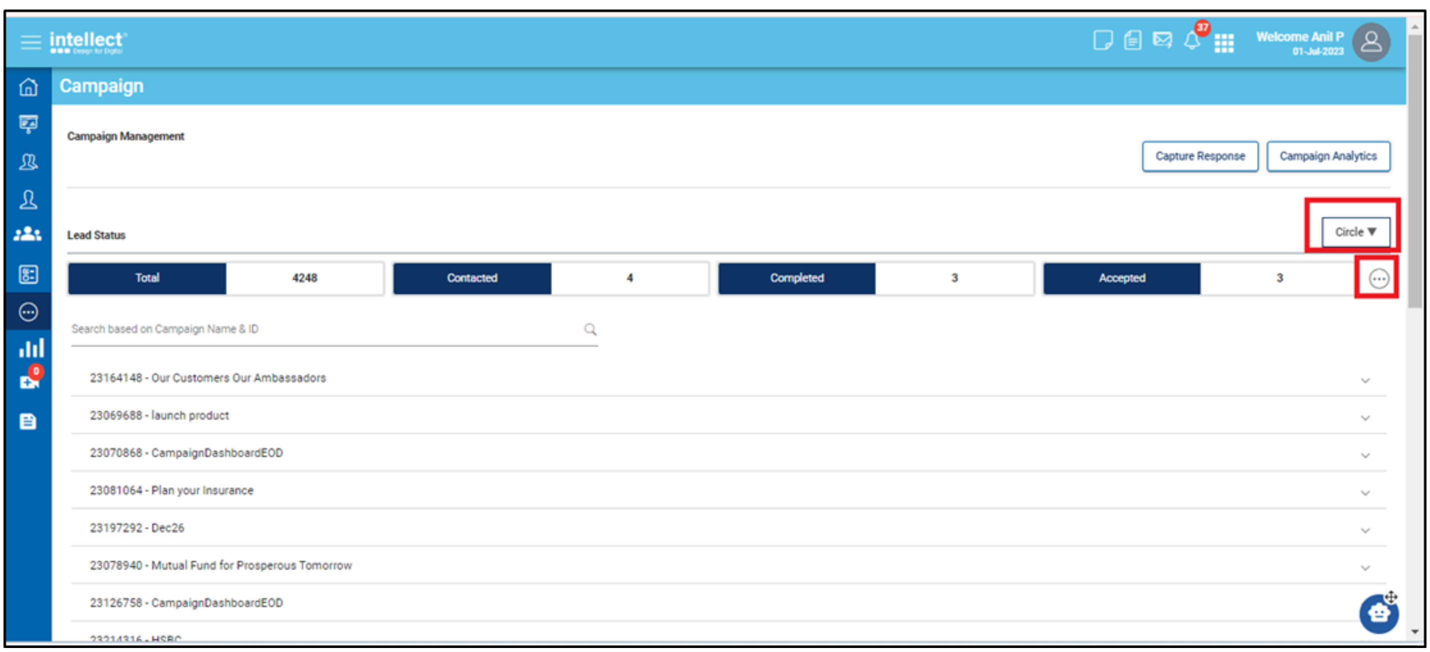


Screen: Navigate to the Campaign Dashboard

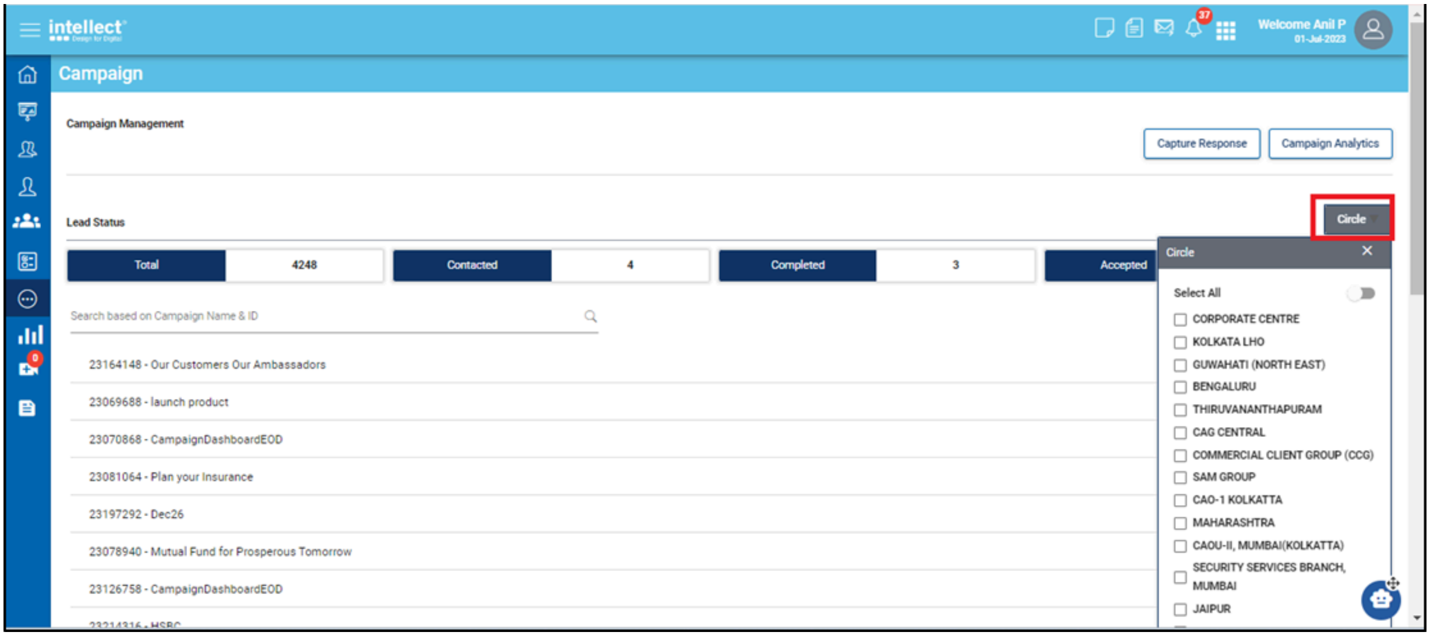


Screen: Campaign Dashboard

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

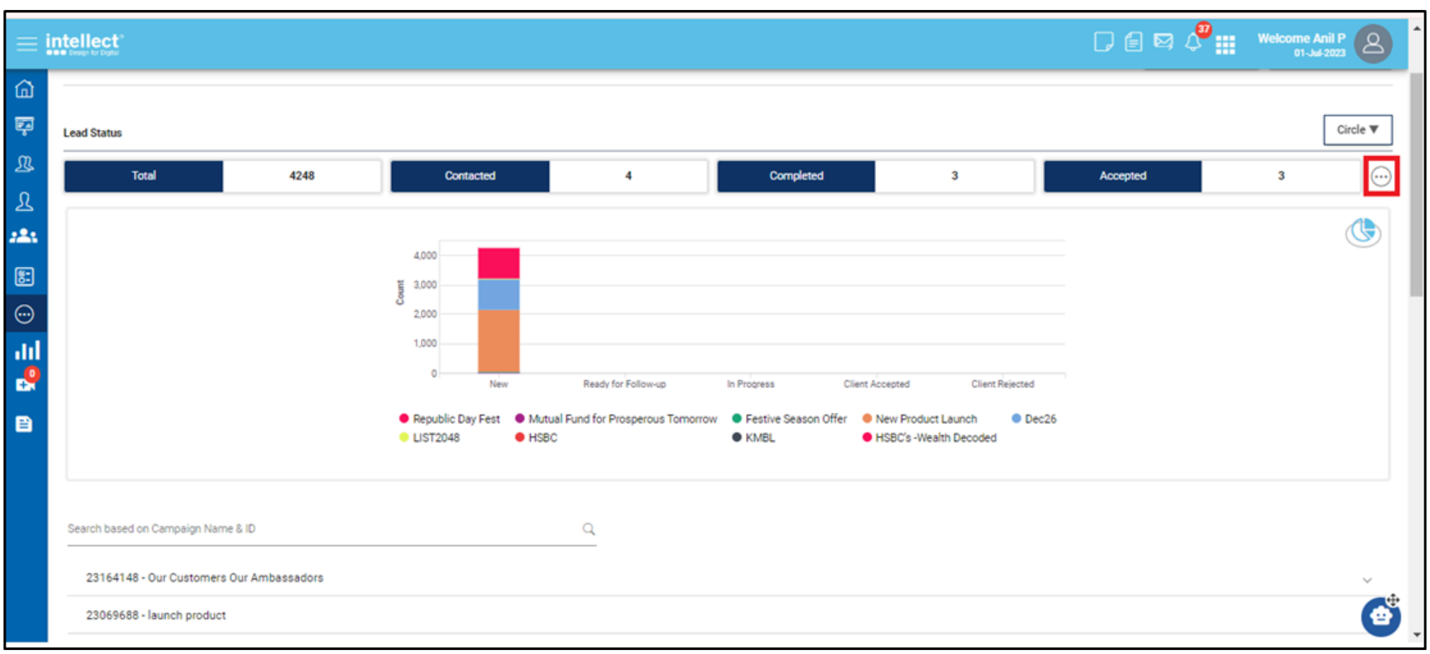


Screen: Filter and Three Dots



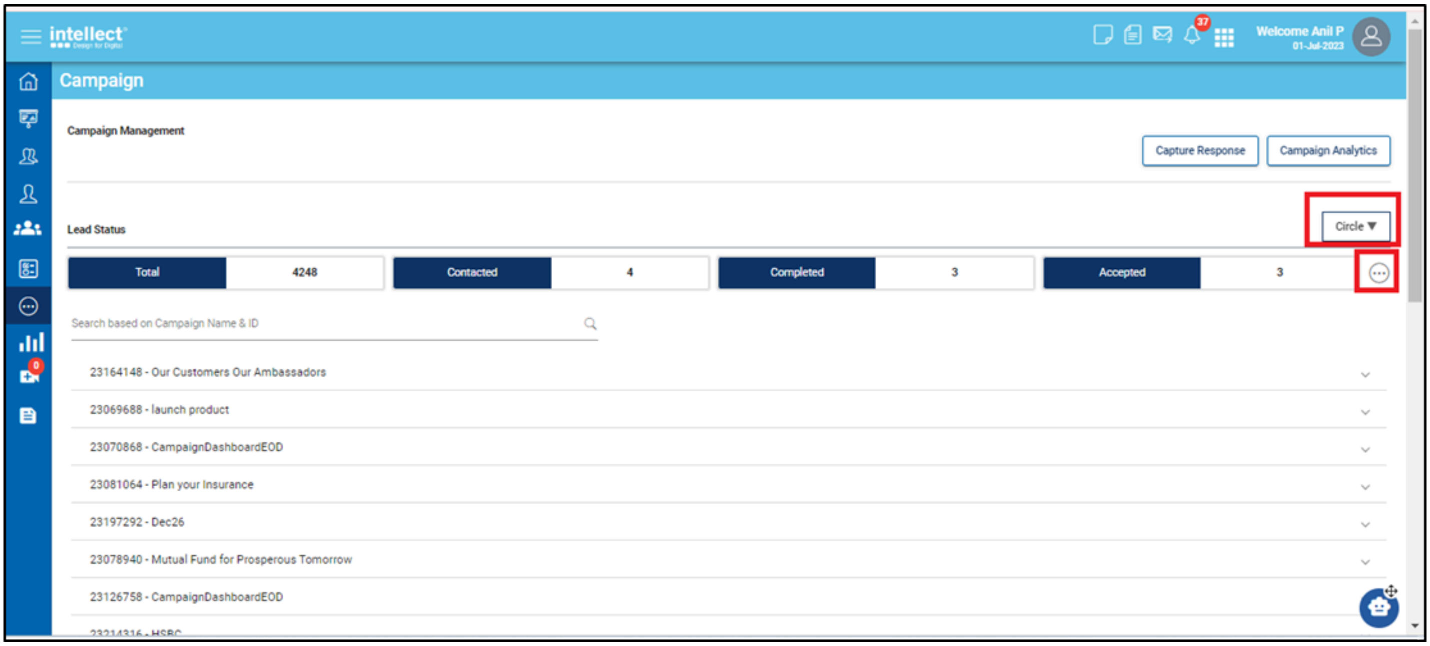
Screen: Select Circle Filter

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

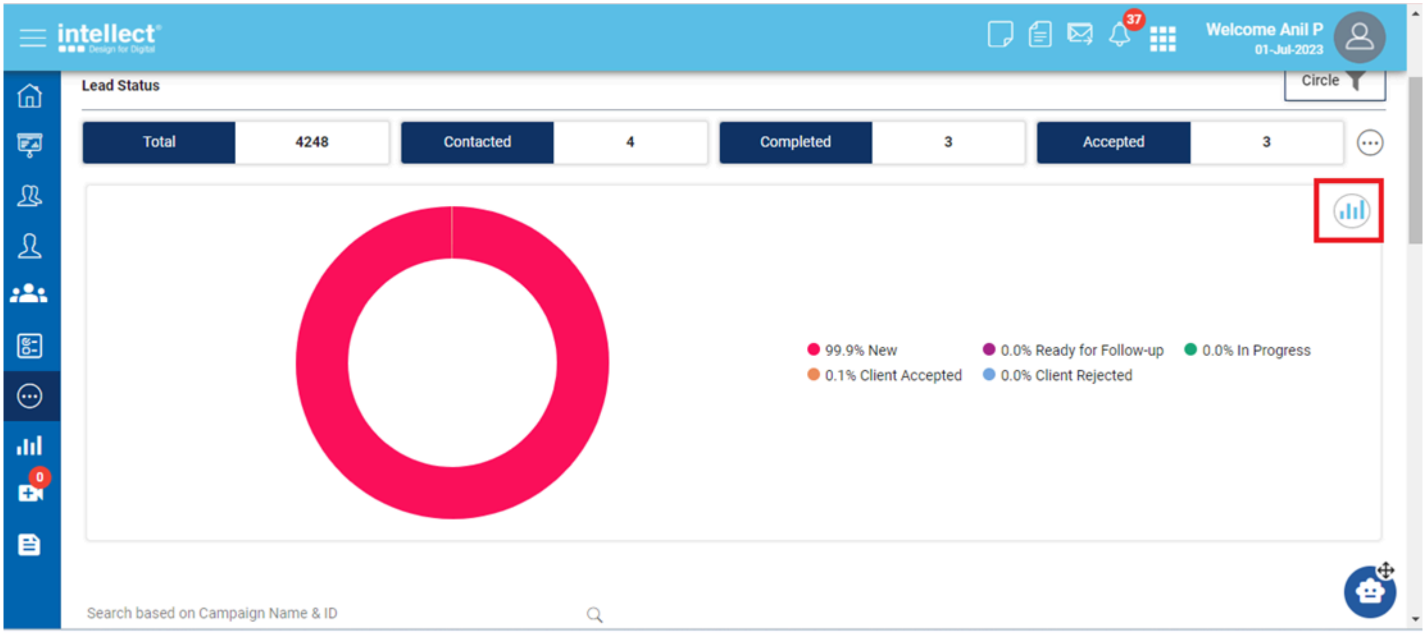
intellect™
Design for Digital



Screen: Collapsed Graphs

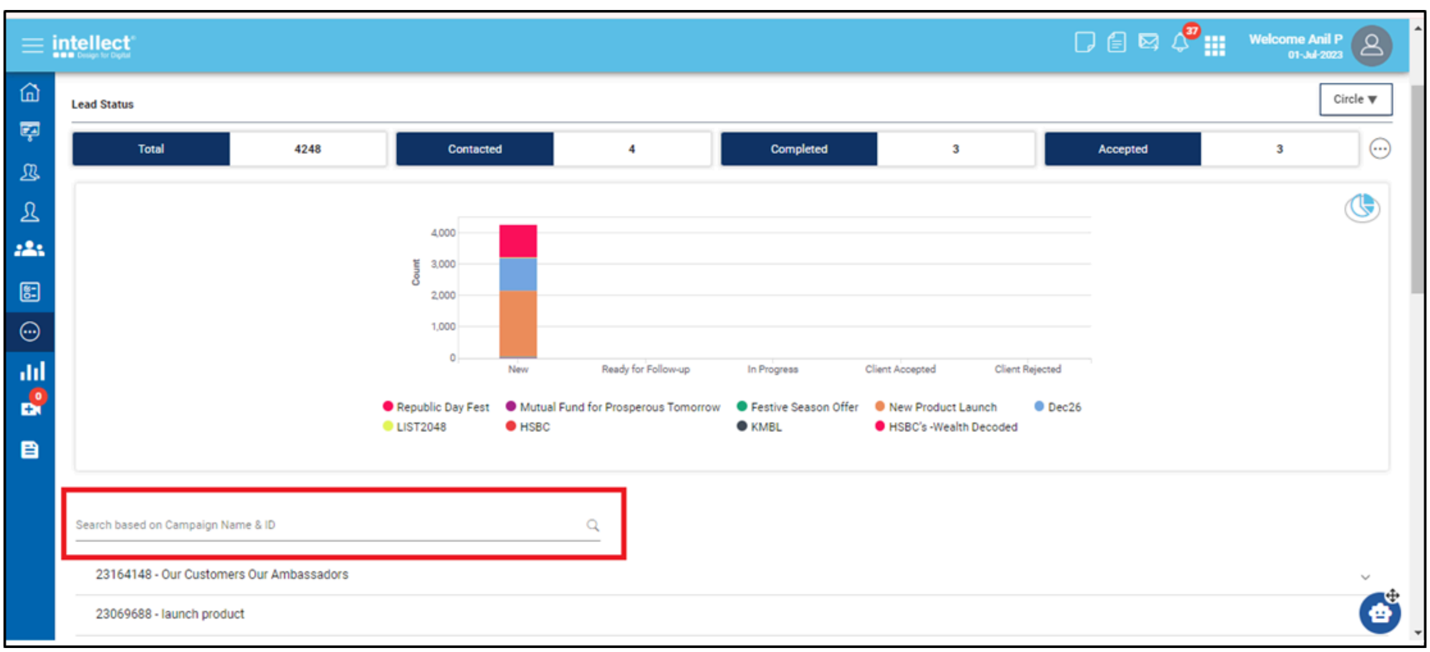
4. The User can switch between a Column chart or Pie Chart view by clicking on the button (highlighted) in the top right corner of the graph

Screen: Column Chart View



Screen: Pie Chart View

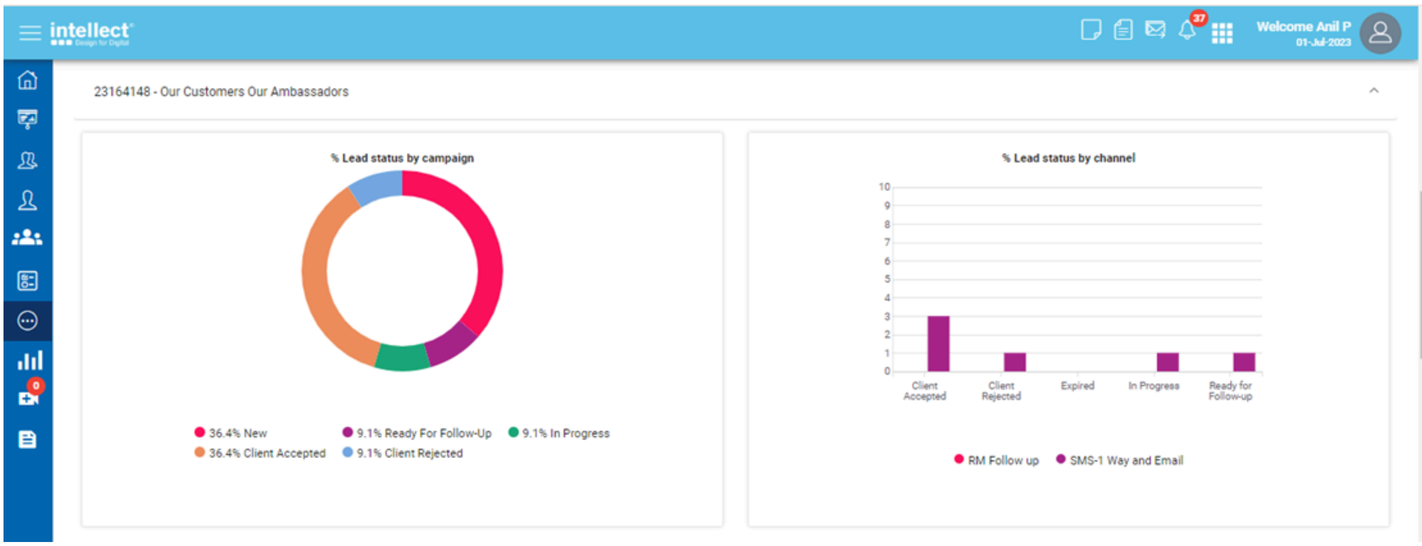
5. The User can view the campaign-specific lead status either by searching for the Campaign by entering the Campaign Name and ID, or by clicking on the "Down Arrow" beside the campaign name to expand the view. This view can be collapsed by clicking on the "Up Arrow" beside the Campaign name



Screen: Search for a Campaign

6. The "Lead status by campaign" and "Lead status by channel" are displayed to the user. Leads who are followed up by the RM (RM updates the lead response status – refer to section Capture Responses) would be tracked under the "RM Follow up"

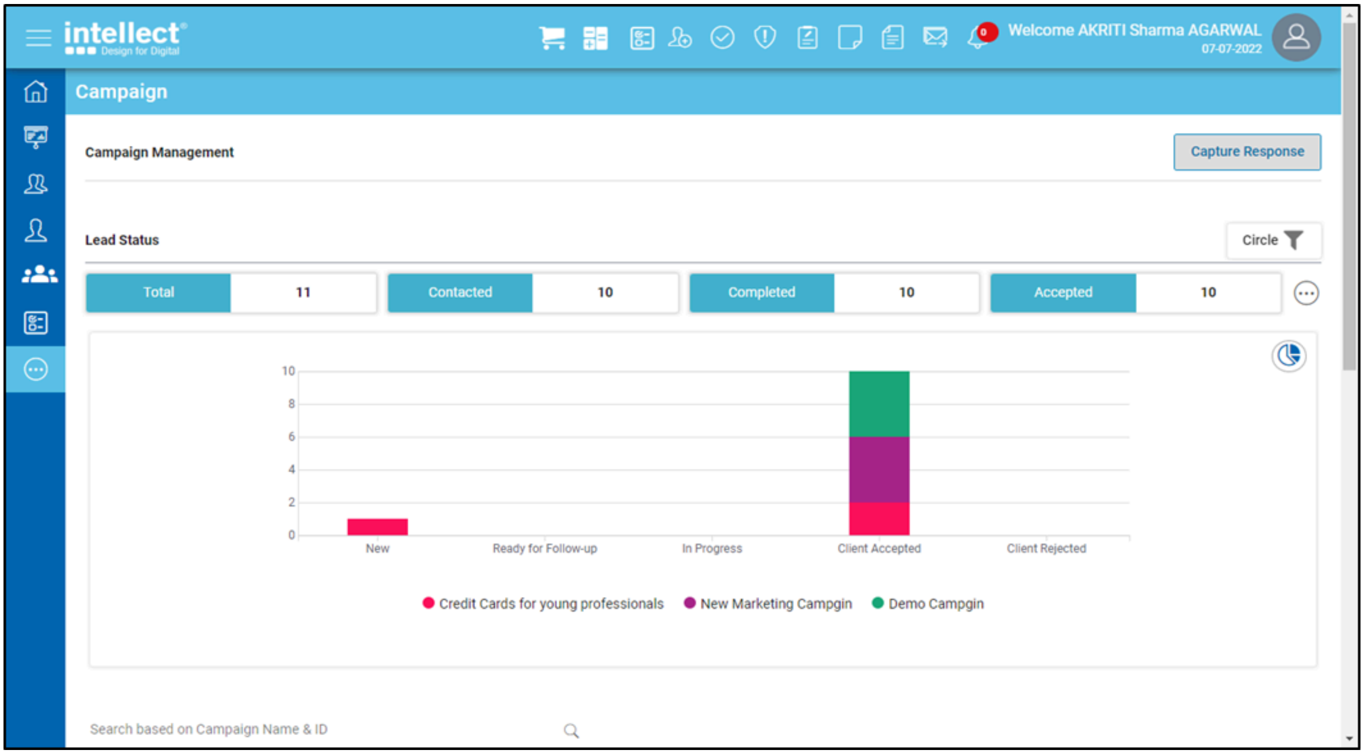
channel. Leads for whom the response status is received through campaign communication channels (No Contact, SMS-2 way and Email, SMS-2 way, SMS-1 way, Email, SMS-1 way and Email) can be uploaded in the system and would be tracked under the respective campaign communication channel (refer to section 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 Annexure for Campaign Response Upload Template)



Screen: Individual Campaign Lead Status

4.3.8.1 Capture Responses

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



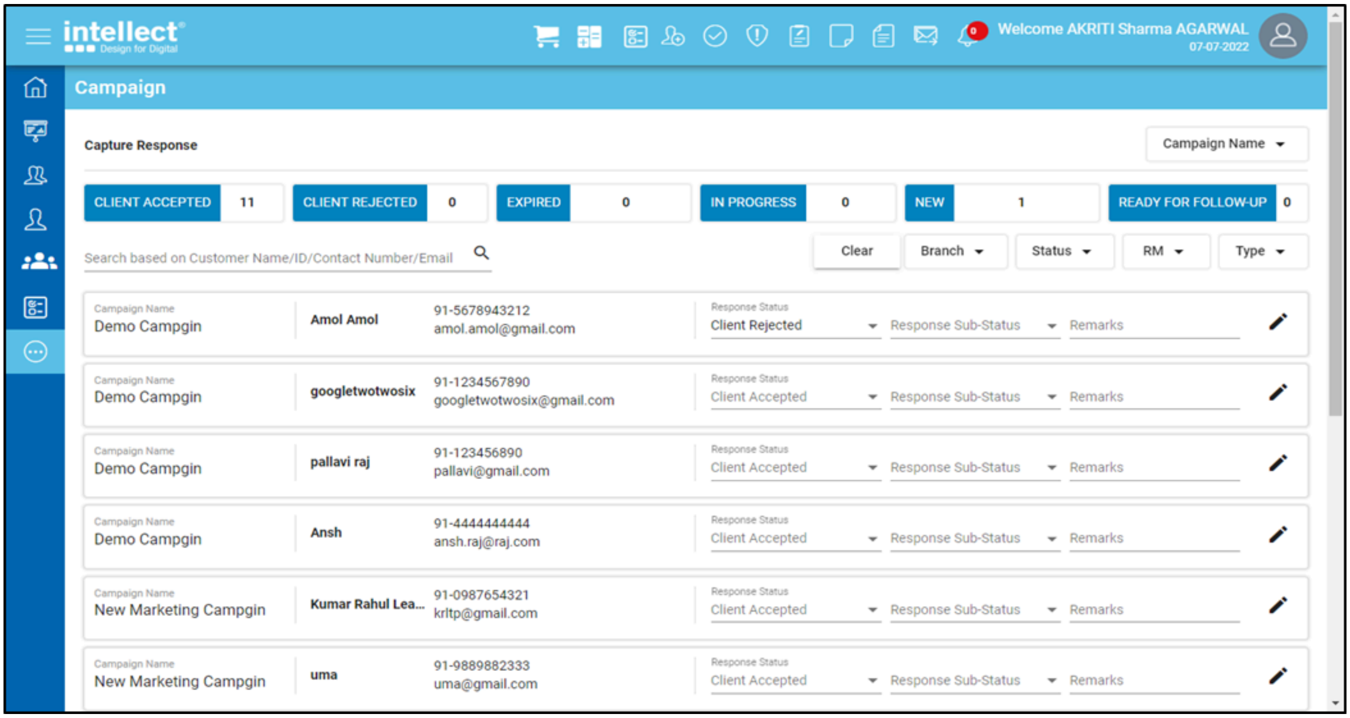
Screen: Navigating to the Capture Response screen

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 an 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 to section View Campaign Dashboard)



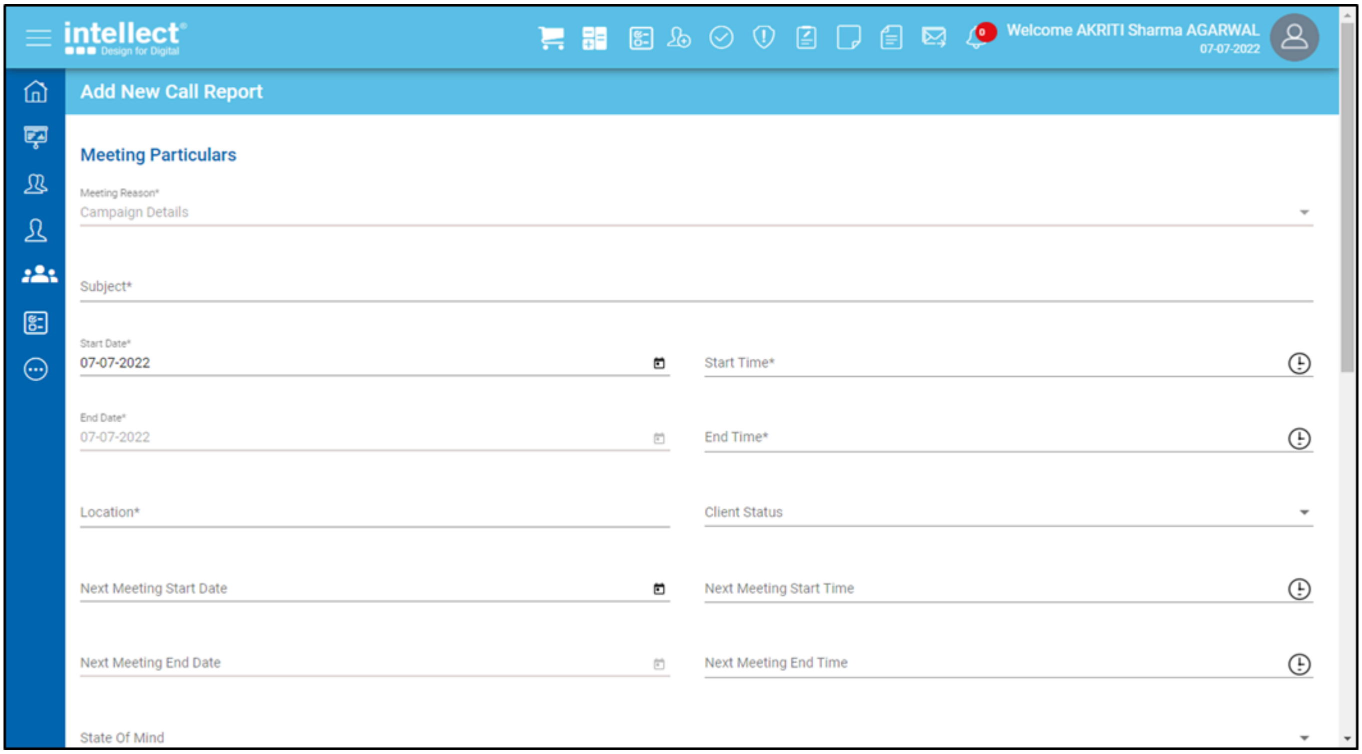
Screen: Capture Response screen

4.3.9 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. In 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, the 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

intellect™
Design for Digital

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	Display	No	String	Yes	Not Applicable	
2	Campaign Type	Displays the Campaign Type	Display	No	String	Yes	1. Event 2. Normal	
3	Campaign/Even t 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	Maker Id-Maker Name	Displays the Maker Id and Name	Display	No	String	No	Not Applicable	
7	Authorizer Id-Authorizer Name	Displays the Authorizer Id and Name	Display	No	String	No	Not Applicable	
8	Creation date	Displays the creation date of the campaign	Display	No	String	Yes	Not Applicable	
Campaign Definition – General								
1	Campaign/Even t name	Inputs the Campaign/Event name	Input	Yes	String	Yes	Not Applicable	
2	Campaign name (local language)	Input the Campaign name	Input	Yes	String	No	Not Applicable	
3	Campaign Type	Select the	Select	Yes	String	Yes	1. Event	

		Campaign Type					2. Normal	
4	Campaign/event ID	Displays the Campaign/Event ID. For a new campaign, this field is not editable	Display	No	Numeric	Not Applicable	Not Applicable	
5	Target response rate (%)	Inputs the Target response rate (%)	Input	Yes	Numeric	Yes	0-100	
6	Objective	Inputs the Objective of the campaign	Input	Yes	String	Yes	Not Applicable	
7	Campaign Channel	Selects the Campaign Channel for broadcasting the campaign information	Select	Yes	String	Yes	1. No contact 2. SMS-2 way and Email 3. SMS-2 way 4. SMS-1 way 5. Email 6. SMS-1 way and Email	
8	Campaign/Event Status	Displays the status of the campaign	Display	No	Character	Not Applicable	1. New 2. Rejected 3. Active 4. Completed	
9	Sub Product	Selects the type of sub products associated with campaign	Select	Yes	String	No	List of sub products	
10	Product Type	Selects the type of products associated with campaign	Select	Yes	String	No	List of products	
11	Product Availability	Selects the availability of campaign product	Select	Yes	String	No	1.Yes 2.No	
12	Product Name	Selects the name of product	Select	Yes	String	No	Not Applicable	
13	Reward For RM	Inputs the reward to RM on successfully achieving the	Input	Yes	String	No	Not Applicable	

		campaign targets						
14	Reward for customer	Inputs the reward to customer if he/she subscribe to the campaign	Input	Yes	String	No	Not Applicable	
15	Campaign Performance (%)	Displays the campaign performance	Display	No	Numeric	Yes	0-100	
16	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 5. Others	
17	Start Date	Inputs the campaign start date	Input	No	String	Yes	Not Applicable	
18	End date	Inputs the campaign end date	Input	Yes	String	Yes	Not Applicable	
19	Broadcast Date and Time	Inputs the date and time at which campaign information will be broadcasted	Input	Yes	Numeric	No	Not Applicable	
20	Campaign Period(Days)	Displays the period during which campaign will be active	Display	No	Numeric	Yes	Not Applicable	
21	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	Selects the Currency for the selected cost type. This is defaulted to INR	Select	Yes	String	No	List of Currencies	
Campaign Definition – Admin								
1	Campaign Manager Name	Selects the Campaign manager name	Select	Yes	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	Yes	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	Display	No	String	Not Applicable	1. Lead 2. CIF	

		(Existing wealth Customer)						
Campaign Definition - Campaign Notes								
1	Subject	Inputs the Subject of the email for the campaign communication	Input	Yes	String	Yes	Not Applicable	
2	Email Body	Inputs the Email Content for the campaign communication	Input	Yes	String	No	Not Applicable	
3	Signature	Inputs the Signature of the institution	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 Applicable	String	No	Not Applicable	
List Management – Grid								

1	List ID	Displays the Lead List ID	Display	No	String	Yes	Not Applicable	
2	List Name	Displays the Lead List Name	Display	No	String	Yes	Not Applicable	
3	Rule criteria	Displays the Lead Rule criteria of the list	Display	No	String	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	Circle	Displays the Circle 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 Applicable	Not Applicable	
2	Criteria Name	Displays the lead rule Criteria Name	Display	No	String	Not Applicable	Not Applicable	
3	Criteria	Displays the Criteria definition of the lead rule	Display	No	String	Not Applicable	Not Applicable	
4	Status	Displays the Status of the lead rule	Display	No	String	Not Applicable	Not Applicable	
5	Owner ID	Displays the	Display	No	String	Not	Not Applicable	

intellect™
Design for Digital

		Owner ID of user who has created lead rule				Applicable		
6	Creation Date	Displays the Creation Date of the lead rule	Display	No	String	Not Applicable	Not Applicable	
Lead Rule								
1	Criteria Name	Inputs the criteria name for the lead rule	Input	Yes	String	Yes	NA	
2	Select Criteria	Selects the criteria for the lead rule	Select	Yes	String	Yes	1. Segment 2. Differently Abled Person 3. ISA Form 4. Client category 5. Tax Status 6. Wealth Hub 7. Total AUM/ Credit 8. Fixed Income Holdings 9. Currency 10. Fixed Income Last purchase 11. No. of Product Type Holdings 12. Product Name 13. Current Age 14. Birthday 15. Gender 16. Citizenship 17. Last Contacted 18. Risk Appetite 19. Marital Status 20. No. of dependents 21. CIS creation date 22. Branch 23. City/Town 24. State	

							25. Postcode 26. Employer 27. Customer Category 28. Type of Business Unit 29. Deposits Holding 30. Investment Holding 31. Insurance Holding 32. Loan Holding 33. Current account Holding 34. Savings account Holding 35. Fixed deposit Account Holding 36. Mutual Fund Holding 37. Bonds Holding 38. Equity Holding 39. Structured investment Holding	
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/Select	Yes	String	Yes	List is based on Criteria	
Campaign Dashboard								
1	Total	Displays the total leads of all the active campaigns	Display	No	Numeric	Not Applicable	Not Applicable	
2	Contacted	Displays the number of leads contacted If campaign	Display	No	Numeric	Not Applicable	Not Applicable	

		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"						
3	Completed	Displays the number of completed leads "Client Accepted + Client Rejected"	Display	No	Numeric	Not Applicable	Not Applicable	
4	Accepted	Displays the number of leads accepted "Client Accepted"	Display	No	Numeric	Not Applicable	Not Applicable	
5	Circle	Filters the Campaign Dashboard details for the circle selected	Filter	No	Character	Not Applicable	List of Circles	
Lead Response – Summary								
1	New	Displays the number of leads with Response Status :New	Display	No	Numeric	Not Applicable	Not Applicable	
2	Ready for Follow	Displays the number of leads with Response Status : Ready for Follow Up	Display	No	Numeric	Not Applicable	Not 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	
Lead Response - Search and Filter								
1	Search Based on customer name/ ID/Contact Number/ Email	Search Based on Lead name/ ID/ Contact Number/ Email	Input	Yes	Character	No	Not Applicable	
2	Clear	Clears the filters applied	Clear	Not Applica ble	Character	Not Applicable	Not Applicable	
3	Branch	Filters the leads for the selected branch	Select	Yes	Character	No	List of Branches	
4	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	
5	RM	Filters the leads for the selected RM	Select	Yes	Character	No	List of RMs	
6	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 Name	Display	No	Character	Not Applicable		
3	Lead Contact Number	Displays the Lead Contact Number	Display	No	Numeric	Not Applicable		
4	Lead Email Address	Displays the Lead Email Address	Display	No	String	Not Applicable		
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	Select	Yes	String	No	1. Client Abroad, Email Taken 2. Conference Call 3. Not Contactable	

							4. Not Interested In Bank Services 5. None	
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	Input	Yes	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	Select	Yes	String	No	1. Happy 2. Irate 3. Satisfied 4. Sensitive 5. None	
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 Offshore 4. Others 5. Telephone 6. Telephone Offshore 7. Video Conference 8. Video Conference Offshore	
3	Relationship	Displays the Lead Name and Lead ID	Display	No	String	Not Applicable	Not Applicable	
4	Person Met	Inputs the name of the Person who	Input	Yes	Character	No	Not Applicable	

		met the lead						
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	Contact Details	Inputs the Contact details of the Lead	Input	Yes	String	Yes	Not Applicable	
10	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.

Lead Upload Template.xls

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

Campaign Response.xlsx

3. The sample Campaign Reports are attached below

Campaign Management-Campai   Campaign Management-Campai   Campaign Management-Lead M

9. Glossary

N/A

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