

CGT SDN BHD

Sales Tracking Process for Citadel (Internal Use Only for weekly updates to Group CEO)



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| Lead Mgmt (Prospecting) | LeadGen – In-House Agents, External Agencies, Events, Cold outreach, Inbound Inquiries | <ul style="list-style-type: none"> Sales & Marketing Plan to go to market How, What, Who, When and Why Target Mkt according to products |
| Lead Qualification and Analysis | BANT – Budget, Authority, Need and Timeline | <ul style="list-style-type: none"> Is it a good lead? |
| Lead Assignment | If it is Inbound Inquiries – share lead to right sales agent (if any). Each lead equals to an opportunity | |
| Proposition | Sharing of products and services with proposals etc <small>Based on products in the system</small> | <ul style="list-style-type: none"> List of products will be listed in the system and to be click on when proposing |
| Negotiation | Clients are given multiple offers and is contemplating on what is a good placement for them | <ul style="list-style-type: none"> Deal Value Probability of closing Expected date of closure |
| Commit/Decision | Clients are confirmed and will provide ekyc (Citadel First) and provide payment accordingly | |
| Closure | Payment made and FP signed and delivered | |

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Individual Opportunity and Pipeline Tracking



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| Deal Tracking | F2F meeting, calls, emails Time taken to convert a lead to an opportunity Time taken to convert an opportunity to a pipeline | <ul style="list-style-type: none"> How often each deal are being follow up? Weekly? Every other day Revenue size and type base on which product for each deal |
| Nurture of leads | Sharing of case studies, comparisons, testimonials | |
| Objections | Why Citadel? Earnings, Coverage, Pricing, Risk Concerns, Good returns on monthly basis | <ul style="list-style-type: none"> Who are the competitors Value proposition Trust and security of Citadel Issues Face What Help needed |
| Closing | Securing of approval but haven't sign yet. Secure verbal confirmation and follow up with eKYC in Citadel First and signed agreement | <ul style="list-style-type: none"> Why did we lose or win the deal Competitors Internal issues External issues |
| Closed | Signed, Sealed and Delivered | <ul style="list-style-type: none"> Commission Payout |
| CTB | CTB to ensure all paperwork and processes are followed accordingly to the SOP within CIMS | |