

CGT SDN BHD

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



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 Based on products in the system	<ul style="list-style-type: none"> List of products will be listed in the system and to be click on when proposing Deal Value Probability of closing Expected date of closure
Negotiation	Clients are given multiple offers and is contemplating on what is a good placement for them	
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

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 <ul style="list-style-type: none"> Value proposition Trust and security of Citadel <ul style="list-style-type: none"> 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 <ul style="list-style-type: none"> 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	↑