

EPATHUSA.

PROCESS MANUAL – BUSINESS DEVELOPMENT

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Approval Details

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VERSION HISTORY

DCR No	Date	Nature of Change	Brief Reason for Change	Page / Section Where Changes Made	New Version No

❖ **Definitions and Acronyms**

ACRONYM/ TERM	DEFINITION/ DESCRIPTION
BD	Business Development
MD	Director
MGR	Manager
SDH	Solution Delivery Head

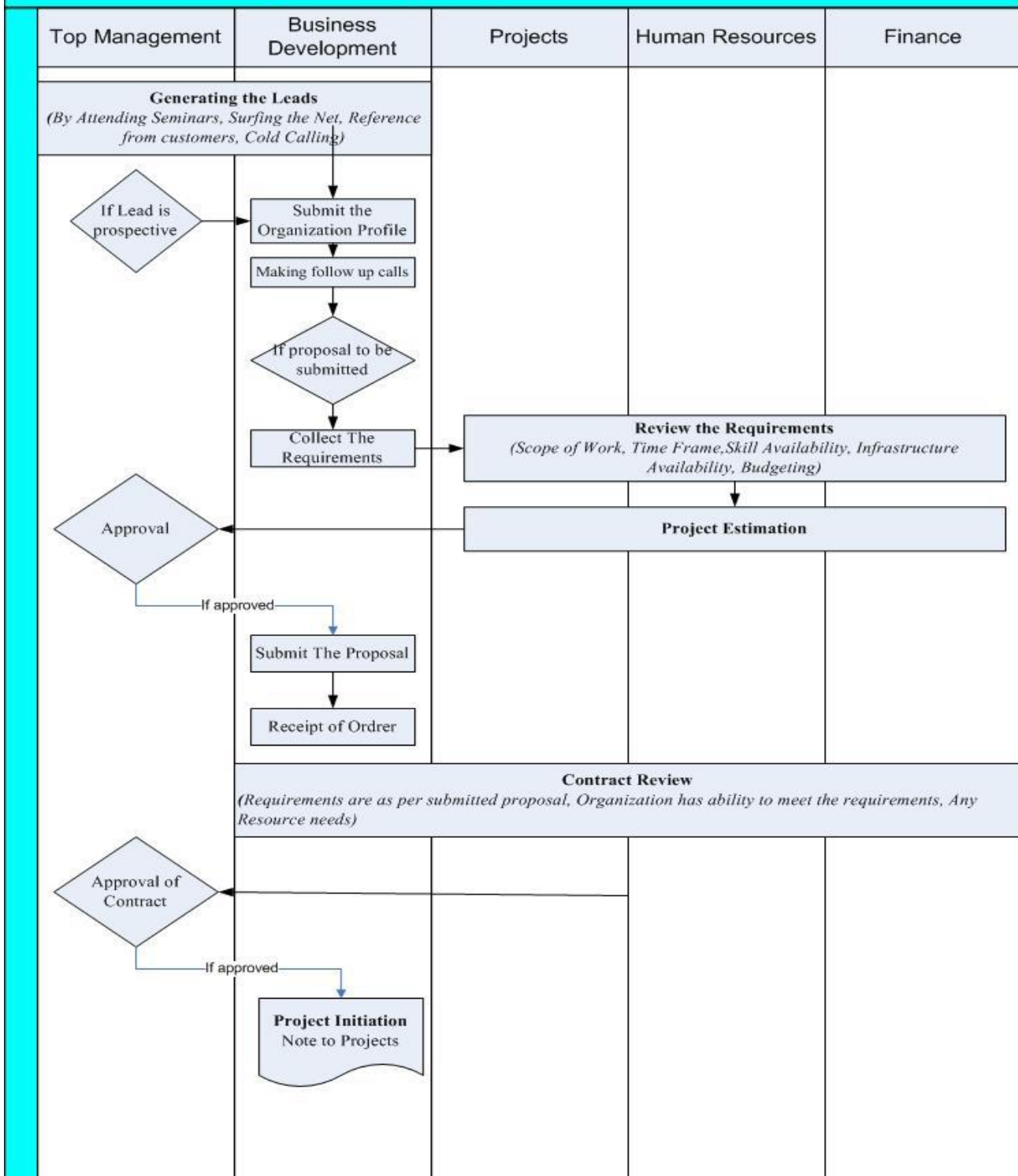
❖ **Activity / Responsibility Matrix**

NO	ACTIVITY	MD	MGR BD	SDH
01	Generating the lead	I	R	I
02	Making follow up calls		R	
03	Approving the prospect		R	R
04	Preparation of estimation		I	R
05	Approval of Quotation	R		
06	Contract Review	R	I	I
07	Preparation of Project Initiation Note			R
08	Response to Queries and Complaints		R	I
09	Collecting Customer Feedback		R	I

R – Responsible; I - Involved

- ❖ **Purpose**
To Ensure Business Development Team Generates Leads from various sources and convert them into prospective customers
- ❖ **Scope**
Covers All calls made by business development team regarding organization services and projects
- ❖ **Entry Criteria**
Leads Generated
Enquiry from Customers / Prospects
- ❖ **Exit Criteria**
Contract Review
Submission of Quotation
Receipt of Order
- ❖ **Output**
Project Initiation Note
- ❖ **Action & Method**
(Refer Process Flow Diagram in Next Page)
- ❖ **References**
Quality System Manual – QSM/EPATHUSA/01
- ❖ **Documents**
Nil
- ❖ **Formats and Records**
Contract Review Check List - QF/EPATHUSA/BD/01
Proposals Submitted
Customer Orders / Contracts
Project Initiation Note - QF/EPATHUSA/BD/02

Process Interaction Diagram for Project Acquisition



❖ **Purpose**

To ensure customer feedback is collected every quarter or after completion of the project. This feedback is analyzed and reviewed for continual improvement.

❖ **Scope**

This procedure covers all the customers of ongoing projects.

❖ **Entry Criteria**

Completion of the quarter with the customer

Project completion

❖ **Exit Criteria**

CSS agreed with the customer

❖ **Output**

CSS (QF/EPATHUSA/BD/03) duly filled up by the customer

❖ **Action Method**

- After every quarter or completion of each project, Customer Satisfaction Questionnaire (QF/EPATHUSA/BD/03) is sent to customer by seeking his / her feedback on organization performance during development
- Once filled questionnaire is received from customer, the SDH & Director reviews and takes appropriate actions for improvement if required
- The data is reviewed in management review meetings by Director.
- The corrective/ preventive actions are initiated in following cases
 - If overall rating is below 70%
 - If customer has given rating below 4 for any parameter in the report
 - Against suggestions given by customer
- A letter or mail shall be sent to customer describing action plan against his feedback if required.

❖ **References**

Nil

❖ **Documents**

Nil

❖ **Formats and Records**

- Customer Satisfaction Questionnaire – (QF/EPATHUSA/BD/03)