Techila Solutions Pvt. Ltd.

Phone: +91- 7762924123
E-mail: bhanu@techilasolutions.com
Website: www.techilasolutions.com

Branch Address:
204, Pentagon 3, Magarpatta City
Hadapsar, Pune-411028.

SLA

BETWEEN

TECHILA SOLUTIONS PVT. LTD.

&

ANAKIN MANAGEMENT CONSULTANTS PVT. LTD.

Developed By:
TECHILA SOLUTIONS PVT. LTD.

17-7-2014

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Version

Version	Particulars	Prepared By	Date
V1.0	Service Level Agreement	Sanjana Ramakrishna Anup Kumar	16-July-2014

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Agreement Overview

This is a Service Level Agreement ("SLA" or "Agreement") between *Techila Solutions Pvt. Ltd. (Service Provider)* and Anakin Management Consultant Pvt. Ltd. (Client) for the provisioning of IT services required to develop the requested Software.

This Agreement remains valid until superseded by a revised agreement mutually endorsed by both the parties & outlines the parameters of all IT services covered as mutually discussed.

1. Goals & Objectives

The **purpose** of this Agreement is to ensure that the proper elements and commitments are in place and to obtain mutual agreement for IT service provision between the *Techila Solutions Pvt. Ltd.* and Anakin Management Consultant Pvt. Ltd.

The **goal** of this Agreement is to document of different scenarios that would be possible for users of **CRM Site.**

The **objectives** of this Agreement are to:

- Provide clear reference to service ownership, accountability, roles and/or responsibilities.
- Present a clear, concise and measurable description of service provision to the client.

2. Role and Responsibilities

3.1 Service Provider (Techila Solutions Pvt. Ltd.)

- Develop and implement the software as per the timelines as mentioned in the quotation Dated # 14/07/2014.

- State security methods which will be implemented while developing your Software.

- Describe what process will be used to notify and Coordinate with the end-user organization concerning planned outages .

- To maintain the quality and to develop the software as mutually discussed and documented in the CRM requirement document.

3.2 End User Organization (Anakin Management Consultant Pvt. Ltd.)

- Provide exact requirements for the customized software.
- Make payments at the agreed intervals.
- Provide end user support during implementation.

3.3 Both the Parties.

Both the parties agree and adhere to all the points in the NDA duly signed by the organization.

3. Service Agreement

4.1 Service Scope

The following Services are covered by this Agreement;

PHASE 1 –
- CRM Development as per Annexure – 1.0
- Implementation and Training with 1st Time Data Upload.

PHASE 2 -
- Integration with Drishti Software.

4.2 Timeline

Sr. No.	Particular	Duration
1	Phase-1	45 Days
2	Phase-2	7 Days

4. Service Assumptions

Assumptions related to in-scope services and/or components included:

- Any change in requirement should be communicated and mutually discussed in advance.

- Any changes meeting the deadline will be communicated in the advance will be informed by service provider.

- Meeting will take place as and when required.

5. SLA Conclusion.

Parties agree that the terms of this agreement will be in effect till the completion of the project Service level and procedures established herein have been agreed to by parties represented by the undersigned.

_____   _____

Mr. Angad Singh   **Mr. Pritul Sanghavi**
Techila Solution Pvt. Ltd.   Anakin Management Consultant Pvt. Ltd.
(Service Provider)   (End User Organisation)

6. Attachments (Enclosed with the Email):

- Non Disclosure agreement (NDA)
- Revised Quotation (Pricing, Payment terms and condition and Time required for completion of project)

Annexure 1.0

1. PURPOSE

This document describes the different scenarios that would be possible for users of **CRM Site.**

2. PROSPECTS

1. SMS and Missed Call:

a. Prospects would SMS or give a Missed Call to the company.

b. Sorting of data according to lead and language and storing to CRM.

3. CRM

1. Import of SMS and missed call Data Files in CRM.

2. CRM will provide Number to different TSE.

4. CALLER

1. Data is received by Tele Sales Executive for calling.

2. TSE's call on the numbers for generating appointments for the prospects.

3. TSE's validate the qualifying criteria on the call with the prospects like :

- Nationality : Should be Indian

- Age : Greater than or equal to 25 year

- Education Qualification : 12 and above.

- Training completed and IRDA exam passed.

4. If prospects qualify TSE's explain the role, benefits and process.

5. TSE's convinces the prospects to visit the branch for further processing.

6. TSE's would be able to manage the enquiry and registration of the prospect.

7. If prospects agree TSE's generate the appointment or reason for not selecting.

8. TSE's will fill the required data of the prospects like: Name, Contact number, Address, Pin Code, State, Date of Birth, gender.

7. User would be able to find the eligibility from the date of candidate for qualifying the requirement.

8. User would select the details : Education(Undergraduate, Graduate, Postgraduate)as per selection points would be assigned and calculated as(1,2,3) respectively of selection.

9. User would select Background/Occupation: Self Employed, Self Employed FSS, Service, Housewife, VRS/Retired as per the selection points would be assigned and calculated as(3,3,0,3,3) respectively of selection.

10. User would select marital Status: Married, Unmarried as per the selection points would be assigned and calculated as (2, 1) respectively of selection.

11. User would select Annual Income: 2Lac-3Lac, 3Lac-4Lac, 4Lac+ as per the selection points would be assigned and used for calculation as (1, 2, 3) respectively of selection.

12. User would confirm the fee with the candidate.

13. Post capturing the details would be automatically sent to DEO(Data Entry Operator).

5. **DEO (Data Entry Operator)/ Team Lead**

1. Data Entry Operator will update the data in the Master File.

2. Master Sheet should be unique with no duplicates.

3. Data which will contain all the information about the prospects.

4. This Data will maintain in CRM.

5. Team Lead will validate the data and appointment updates in the master file.

6. Team Lead will allocate the appointment to the ADM/SM for processing.

7. Mail and SMS send to respective ADM/SM along with the prospects about the allocated appointments.

8. Appointment of aspects is based on priority.

9. Mail and SMS will contain Date, Venue and Time in company Excel Sheet.

6. ADM/SM

1. If ADM / SM like the prospects profile, it means she/he is shortlisted for further process.

2. ADM's / SM call the prospect for confirmation.

3. ADM's / SM call the prospects to visit the branch.

4. Prospects are allocated to ADM according to score (11-14).

5. Prospects are allocated to HO whose score is between(9-10).

6. If prospects agree and visit the branch then NAT ID is generated by ADM/SM, and imported in MAX Life server and also imported into the CRM.

7. NAT ID will be in the form of 6 Digit which will be send via SMS.

8. NAT ID will be send from MAX Life to the company which will be imported in the CRM.

9. Related documents are collected by ADM / SM from prospects and send to IRDA.

10. Various report will be generated which will be exported in Excel.

7. IRDA(Insurance Regulatory and Development Authority)

1. Prospects information would be received by IRDA.

2. URN is generated by registering the prospect with IRDA for Licensing.

3. The List of URN generated is also send to MAX life and also imported to CRM.

4. If PAN details are not available of the prospects then URN will not generated by IRDA.

5. IRDA will post URN (Unique Reference Number) to prospect, that Training is scheduled.

6. If prospects attends the complete training, then IRDA will scheduled exam for the prospect.

8. FOLLOW UP TEAM

1. Follow up team will send NAT ID to MAX Life and imported to CRM for 2nd Test.

2. Follow up team validate the data and appointments update in Master File.

3. Follow up team call and asks for appointment from prospects.

4. Follow up team allocates the appointment to the ADM/SM for processing.

5. Follow up team will update to company regarding prospect's exam.

6. Agent ID and ADM ID should be unique.

9. COMPANY

1. Information will be maintained by the CRM.

2. Information will be all about, number of prospects attended the Exam, passed the Exam and Fails or absent for the Exam.

3. Re – Exam will be scheduled by Company.

4. If prospect passes the exam he gets the license to work as an agent or Advisor with the said company.

5. Report will be generated which will be exported in Excel, PDF format and can be mailed.