ESKA® Business Manager

Customer Relationship Management (CRM) Processes Document

ESK/ES-19:0028 Uen

Prepared By

ESKADENIA SOFTWARE

Proprietary and Confidential

A

MSAYED

Laisan

Contents

M SAYED

Document History

Document Version	Date	Summary of Changes	By	Department
0.1	29.09.2019	Document Creation	Amer Kayyali	ESK/ES
0.2	10.10.2019	Review & Update	Laisan Mobaideen	ESK/INS
1	15.10.2019	Baseline	Laisan Mobaideen	ESK/INS

Scope

Identification

This document shall be referred to hereafter as the internal processes of **ESKA® CRM system**.

Purpose

This document describes the basic processes that are managed by the Business Development Department using **ESKA® Customer Relationship Management System (CRM)** to cover their operational activities along with the interaction with the technical departments of any insurance company.

H.SAYED

1 SALES PROCESSES

1.1 Prospect Customer Creation Process

1.1.1 Prospect Customer Creation Overview

- **Purpose:**

  Defining the prospect client in the system is the first stage for starting the sales process with that potential client to record later on communication log and move forward with getting business and close the deal.

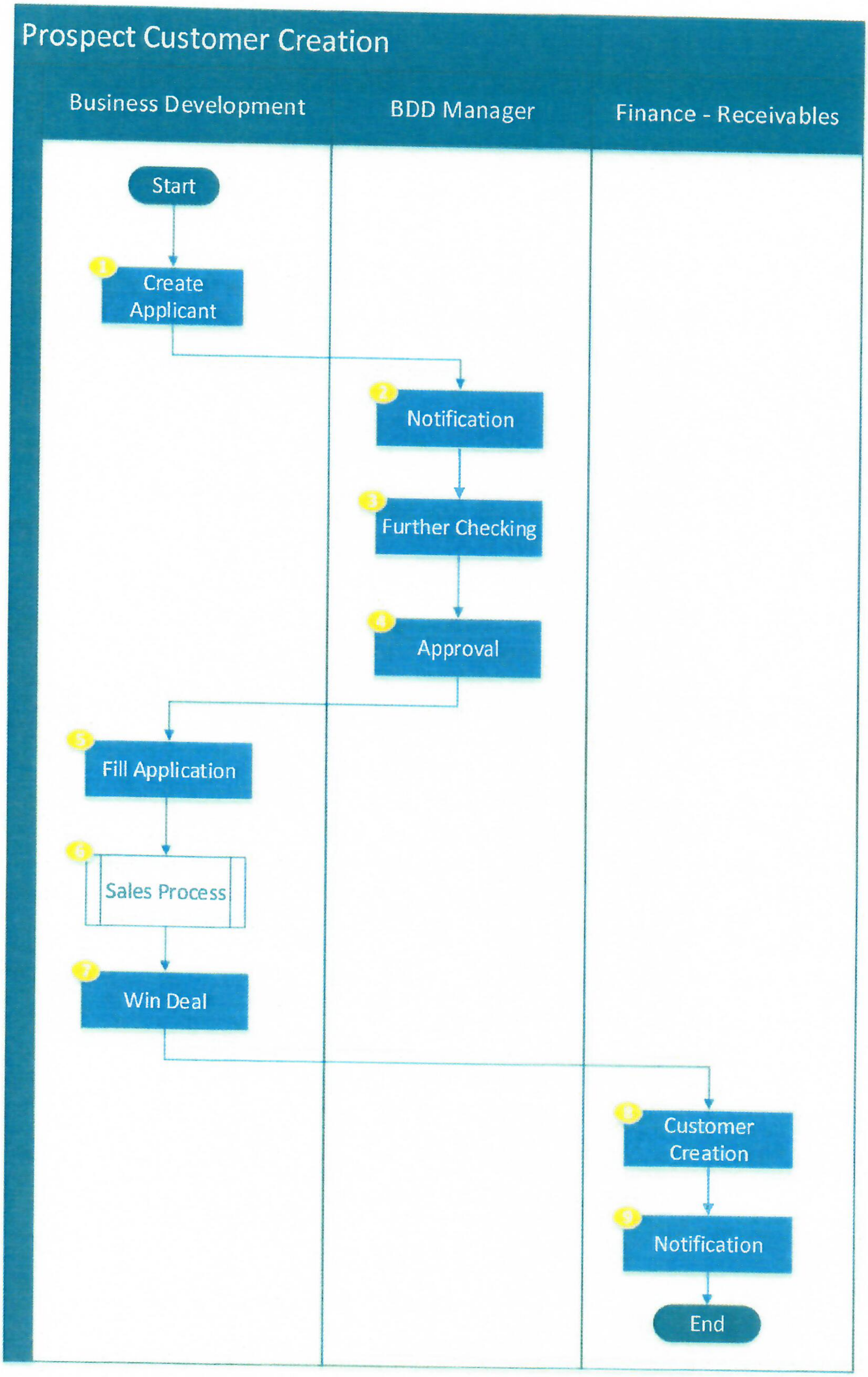
- **Documents:**

  - Documents at early stages may not be needed as the business is not taken yet.
  - Upon getting the business may further documents needed according to each product details and customer service requirements.

- **Involved Stakeholders:**

  - Business development team.
  - BDD Managers.
  - Receivables department.
  - Customers.

1.1.2 Prospect Customer Creation Flow Chart



1.1.3 Customer Creation Flow Description

Step No	Stakeholder	Step	Description
1	Business Development	Create Applicant	The sales team will define the prospect client through the CRM system with the minimum available information about that prospect and by default this applicant will be flagged as inactive till further approvals occur.
2	Business Development Manager	Notification	Upon creating a new applicant from the BDD team, a notification will be sent to the account manager direct supervisor or to a central customer service according to the CRM Gap document section (1.1.06).
3		Further Checking	Checking will be done at this stage to make sure that this prospect is not defined before or is not being assigned to any other account manager, along with validating the applicant information in case of missing any data or any needed checks.
4		Approval	* Upon giving the approval from the approver person on this prospect client, this prospect will be activated so the rest of application details can be filled and NBI later on can be issued. * In case this prospect has not been approved, the record will be still there in the system while no one can proceed with filling the application nor doing any transaction for him in the system.
5	Business Development	Fill Application	After getting the approval of the applicant, the BDD can access the Credit Insurance system and start filling the rest detailed information of the application.
6		Sales Process	Sales will go through the sales process and prospect information will be added during the pipeline journey as collecting information is a continuous process during this journey all communications done should be recorded in the system for historical and follow up purposes.
7		Win Deal	After all sale processes completed and getting all the needed approvals and agreements with the prospect client, the policy will be issued and the deal is closed by taking it up.
8	Finance - Receivables	Customer Creation	After issuing the policy and winning the deal the prospect client becomes a new customer in the financial receivables records automatically by the system according to the initial sales channel.
9		Notification	* The receivables team will receive a notification that a new customer has been defined in their records and a new customer no. will be automatically generated by the system. * The receivables team can determine the "Credit Limit" and "Credit Period" of this client for future transactions. * Flagging customers as "Black list" or "On hold" can be determined by the receivables team and will affect all systems that are integrated with AR module.

MSAYED

1.2 Communication with Customers Process

1.2.1 Communication with Customers Overview

- **Purpose:**

  The communication with the clients or prospects is a continuous activity of the business development team, so they need to follow up with them, arrange meetings or calls to make sure that the customer service and satisfaction is being met.

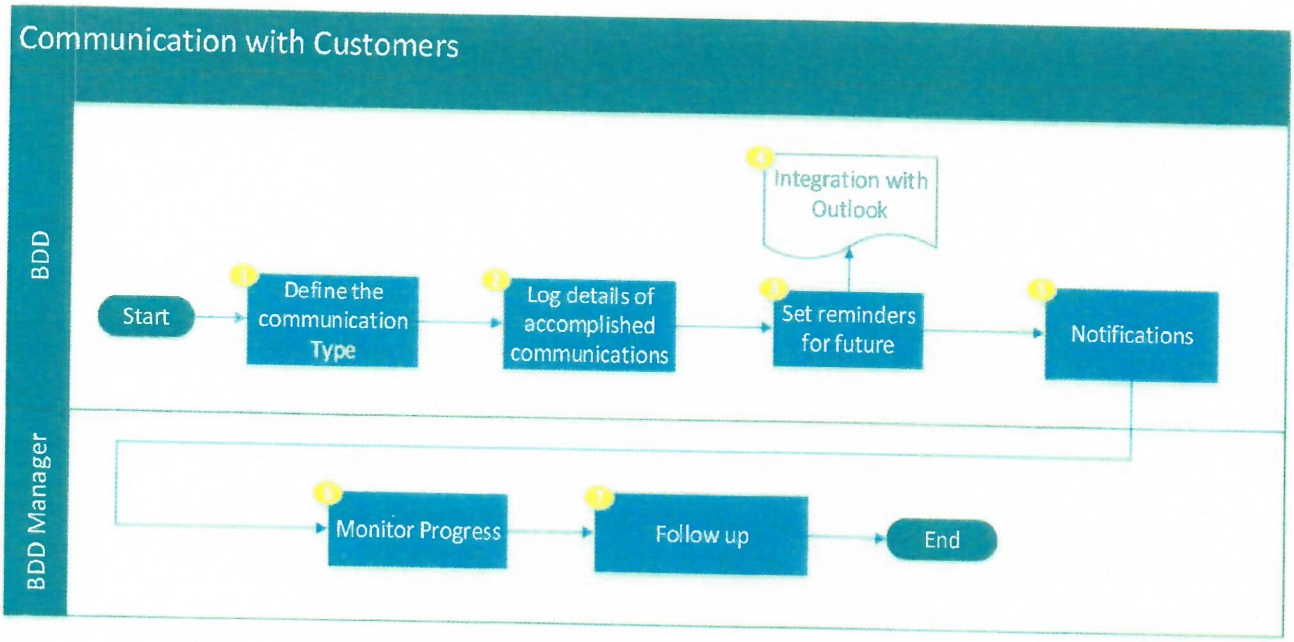
- **Documents:**

  - Minutes of meeting according to certain types will be needed.

- **Involved Stakeholders:**

  - Business development team.
  - BDD Managers.
  - Customers or Prospects.

1.2.2 Communication with Customers Flow Chart



Mahfouz
9/12/2019

Dawcan

1.2.3 Communication with Customers Flow Description

Step No	Stakeholder	Step	Description
1	Business Development	Defining Communication Type	Multiple communication methods can occur between the BDD and the client either by emails, phone calls, meetings or any other communication channel.
2		Log details of accomplished communications	After completing the communication with the client, all outputs should be logged in the system for further follow-ups and controlling that will ease reaching the information later on and enrich the system that can be helpful for the organization and the BDD team in case of reassignments of account managers or even resignations, so all details will be there in the system.
3		Set Reminders for Future	According to the communications performed, further communications might be requested and arranged for later stages, so the account manager should set the date and time for these activities in order to help him/her in managing these activities and reminders can be populated late on.
4	System (Back end)	Integration with Outlook	All reminders and appointments will be synchronized with Microsoft Outlook to generate reminders either from the Outlook itself or from the system. Booked meetings or appointments set directly on the Microsoft Outlook will be imported into the CRM system to make sure all activities related to the account manager are managed correctly and no intersection can occur.
5	Business Development	Notification	Upon reaching the next appointment or activity with the client, the system will automatically notify the account manager with the upcoming activity.
6	Business Development Manager	Monitor Progress	According to the filled data by each account manager, the supervisor or the manager can access his team progress and the recent activities they are doing directly through the system without even asking them to send the weekly report or to update him with the status for any certain lead or the account manager pipeline since all the information can be traced directly through the system from the manager side.
7		Follow up	Following up on the daily activities engaged by the account manager can be easily traced by the direct manager and can directly assign certain leads from one account manager to another or even reassign them according to the needed criteria.

Amer Kayyali
4/12/2019

4/12/2019

4/12/2019

04/12 .2019

04/12/2019

04.12.2019