

|                |                   |                 |            |
|----------------|-------------------|-----------------|------------|
| Doc. No.:      | ESK/ES-21:021 Uen | Classification: | External   |
| Prepared by:   | ESK/ Amer Kayyali | Date:           | 27-08-2020 |
| Approved by:   | ESK/ Mahmoud Issa | Rev.:           | PA. 1      |
| Authorised by: | ESK/C             | Reference:      |            |

# Training Syllabus

## ICIEC Takaful System

(Customer Relationship System - CRM & Incident Management System - IMS)

### 1. Training Information

|                           |                         |                         |                  |
|---------------------------|-------------------------|-------------------------|------------------|
| <b>Project Name</b>       | ICIEC Takaful System    | <b>Project Manager</b>  | Laisan Mobaideen |
| <b>Session Date(s)</b>    | 05.07.2021 – 06.07.2021 | <b>No. of Sessions</b>  | 2                |
| <b>Trainer</b>            | Anas Safi               | <b>Co. Trainer</b>      | -                |
| <b>Session Start Time</b> | 10:00 am                | <b>Session End Time</b> | 01:00 pm         |
| <b>Number of Trainees</b> | //                      |                         |                  |

### 2. Training Sessions Outline

**Session #: 1**

**Session : Customer Relationship System - CRM**

**Date : 05.07.2021**

**Trainees : BDD Team**

| Subject                         | Details                                                                                                                                                       |
|---------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. Summary                      | <ul style="list-style-type: none"> <li>View all activities for the account manager and activities for all account managers beneath the supervisor.</li> </ul> |
| 2. Leads                        | <ul style="list-style-type: none"> <li>Define new prospect clients</li> </ul>                                                                                 |
| 2. Contacts                     | <ul style="list-style-type: none"> <li>Define contacts per lead</li> </ul>                                                                                    |
| 3. Opportunities                | <ul style="list-style-type: none"> <li>Define new opportunity for prospect or existing clients</li> </ul>                                                     |
| 4. Communication                | <ul style="list-style-type: none"> <li>Define planned communications for leads / accounts</li> </ul>                                                          |
| 5. Calendar                     | <ul style="list-style-type: none"> <li>View or add any activities on the calendar along with the integration with Microsoft Outlook</li> </ul>                |
| 6. Accounts                     | <ul style="list-style-type: none"> <li>Converting leads to account and maintaining an account / customer profile</li> </ul>                                   |
| 7. Credit Insurance Integration | <ul style="list-style-type: none"> <li>Viewing all details related to a specific account from the Core technical system (Credit Insurance).</li> </ul>        |
| 8. Financial Integration        | <ul style="list-style-type: none"> <li>Viewing SOA, Outstanding Invoices and Aging for existing customers</li> </ul>                                          |

|                |                   |                 |            |
|----------------|-------------------|-----------------|------------|
| Doc. No.:      | ESK/ES-21:021 Uen | Classification: | External   |
| Prepared by:   | ESK/ Amer Kayyali | Date:           | 27-08-2020 |
| Approved by:   | ESK/ Mahmoud Issa | Rev.:           | PA. 1      |
| Authorised by: | ESK/C             | Reference:      |            |

**Session #: 2**

**Session : Customer Relationship System – CRM & Incident Management System - IMS**

**Date : 06.07.2021**

**Trainees : BDD Team**

| Subject            | Details                                                   |
|--------------------|-----------------------------------------------------------|
| 1. Missions        | • Reserve TOR and BTOR activities                         |
| 2. Sales Team      | • Define the sales team hierarchy and Zones               |
| 3. Sales Targets   | • Set the sales team targets on various factors           |
| 4. Incidents       | • Adding incidents for leads / accounts                   |
| 5. Escalations     | • Escalating incidents.                                   |
| 6. Team Assignment | • Default assignment of incidents to related team members |

### 3. Approvals

| ESKADENIA Project Manager                                                                                                                             | ICIEC Project Manager                                                                                                                                                |
|-------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Name : Ms. Laisan Mobaideen<br>Date : 22 June 2021<br>Signature :  | Name : Mr. Mohamad El-Sayed<br>Date : 22 June 2021                                                                                                                   |
| ESKADENIA Product Manager                                                                                                                             |                                                                                                                                                                      |
| Name : Mr. Amer Kayyali<br>Date : 22 June 2021<br>Signature :      |  Digitally signed by<br>Mohamad El-Sayed<br>Date: 2021.06.22<br>08:32:00 +03'00' |