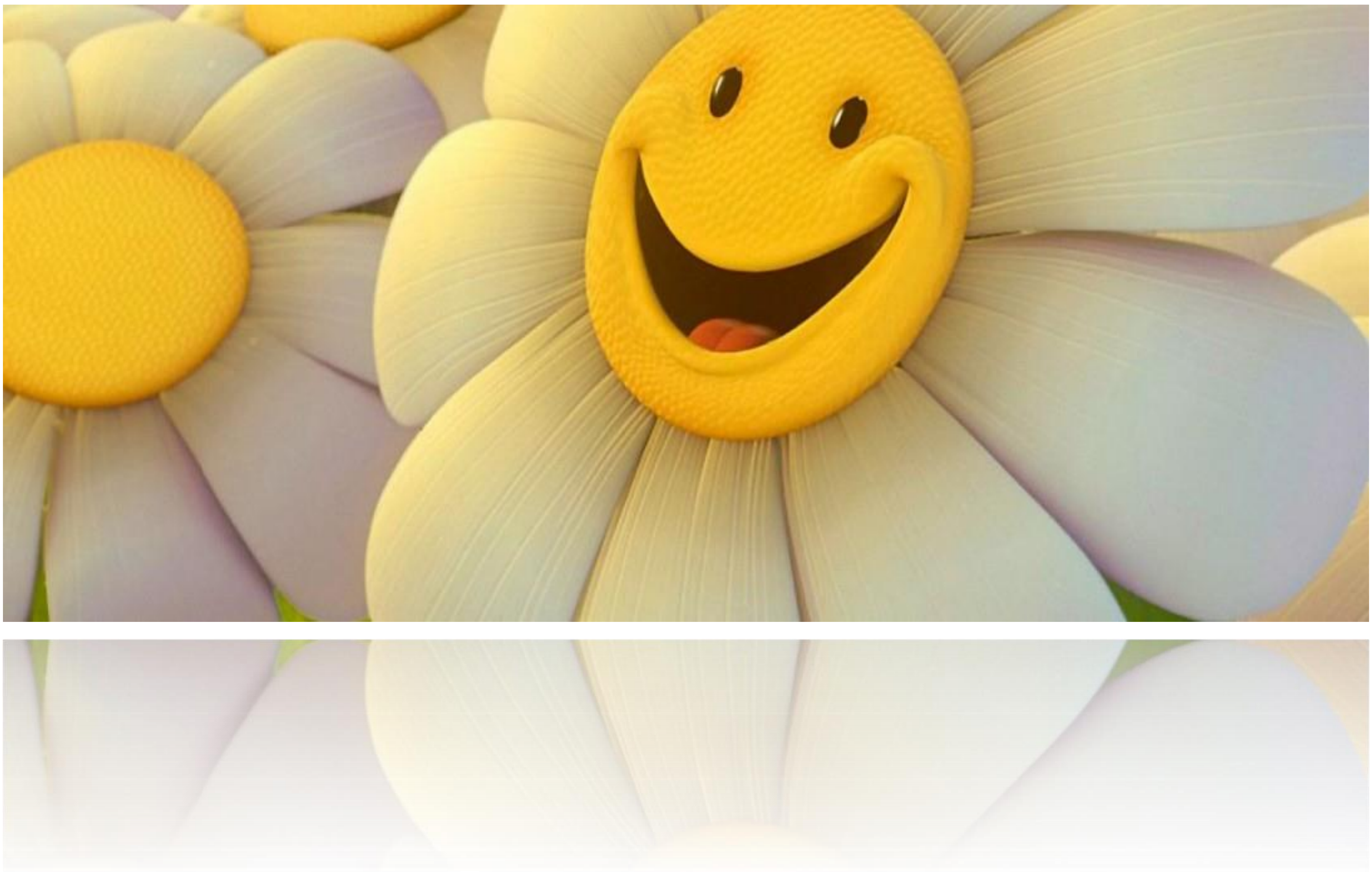
Marketing & Client Service Manual



MARKETING & CLIENT SERVICE MANUAL

"An internal Document of NeuSource to guide the team through a well thought Action Plan, so that all efforts of the team would take the organization ahead in its journey to Growth, Prosperity & Success for all in the Team"

<u>**Neusource Process Outsource Private Limited**</u>

TABLE OF CONTENTS

INTRODUCTION

This document is a guide for the organization to lead the efforts for marketing & customer service area in a strategic manner and to drive the efforts; whether short term or long term, to fulfil the objectives of the organization. Without proper marketing direction and effective follow-ups, cost towards the marketing becomes a huge waste. While at the same time if existing clients are not taken care to win their confidence then the whole efforts on marketing shall be like daily digging for organizational business needs. Therefore we took decision to drive the marketing & CS efforts with a single vehicle.

To start with we are outlining here our targets & guiding principles for all long term goals, so as to make policies accordingly.

MISSION STATEMENT

Establishing a high class **lead generation** system that generates continuous leads.

Attaining the **new client setup** rate at Averaged 4 per month by the end of June 2014.

Increase **customer satisfaction** in terms of Quality Performances.

Making Reminders, Reporting, Courtesy, responsiveness & promptness as a **culture** of neusource.

Increase new customers from **referral** and word of mouth to be 20% of overall new customers per month.

Increase visibility and memorable factor of **brand identity** in NCR area.

Establishing a client **feedback** system through customer service Department.

Serving Clients through regular casual meetings and **exploring new VAS** to serve them & regularly analysing the running assignments.

TARGET CLIENT RANGE

The better we are able to define our target client, the better our chances of developing a list or database that will help us to reach them. For client lists, we want to be alert to all the details pertaining to geography, income, turnover, age, gender, area of operation, hobbies, and special interests etc. Our prime target client is of following description:

Segment:	B 2 B
Market Presence:	At least good Website
Turnover:	Minimum 5/15/25 Crores for (Service/Mfr./Trading)
Employee Count:	Minimum 50
Billing:	Minimum 8,000 p.m.
Financial Trend:	Growing/ Company spending budget on marketing

KEY MILESTONES

Following key dates need to be met in due course

Dates	Targets
November 2013	Establishment of Marketing Plan & Team
December 2013	Crossing Avg. Monthly Billing up to 12 Lakhs
March 2014	Crossing Avg. Monthly Billing up to 15 Lakhs
June 2014	Crossing Avg. Monthly Billing up to 18 Lakhs
September 2014	Crossing Avg. Monthly Billing up to 22 Lakhs
December 2014	Crossing Avg. Monthly Billing up to 26 Lakhs

MAJOR LINE OF ACTIVITY

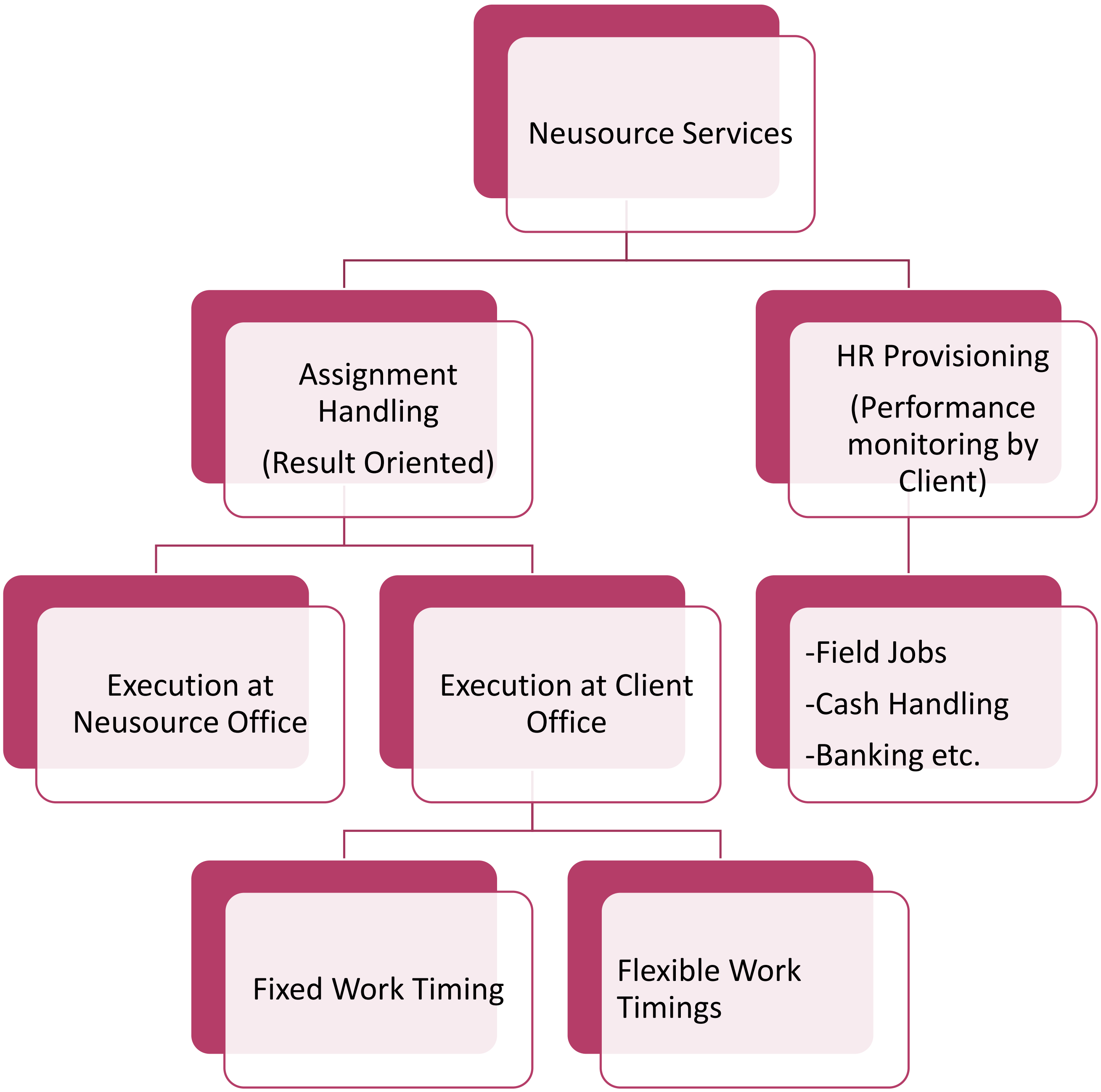
a) Current

- Accounting Services
- Audit Services
- Professional Support

b) Planned

- IMS (Online)
- IMS Implementation
- Neusource Business Growth Programme (Online)
- NGP Implementation
- Seminar & Growth Book
- Online Accounting Support Software

SERVICE PROVISION MODEL



PROCESS & COVERAGE

MARKETING AND CS PROCESS – AT A GLANCE

Enquiry by Client through Call/ SMS/ Mail/ reference/ Other media

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Telephonic respone from Neusource

↓

E-mailer from Neusource

↓

Tentative Meeting Fixed

↓

Corporate Intro shall be sent thru Snail Mail/ Courier

↓

Confirmation of Meeting

↓

Meeting & Quotation during the meeting

↓

Signing of Service Agreement

↓

Signing of Detailed List of Output/ MIS

Decision upon Activity/ Assignment, Tally Set-up/ other outsourcings, if required

Decision upon Backlog completion method

Handover of Relationship Cheque

Opening up Client code

Recruitment Request is sent to HR

"Operations" starts developing & forwarding "Thank You Kit"

Executive is selected & recruited by HR

Co-ordination between Operations, HR & Client shall be done by CS (First Time & Ever After)

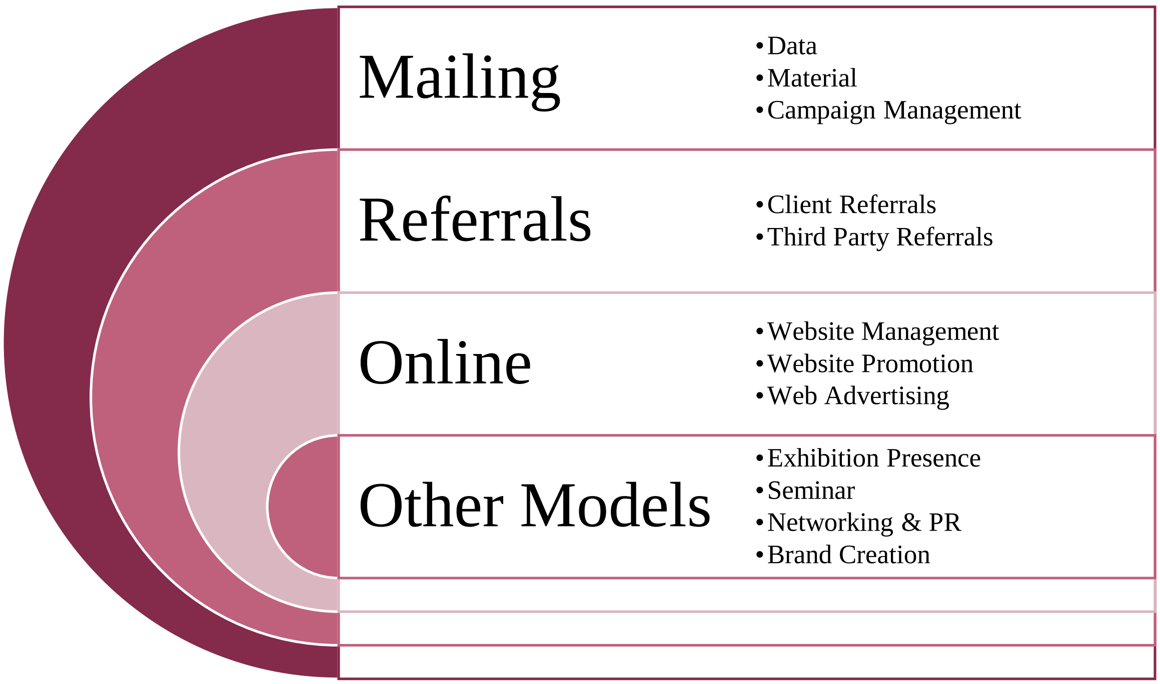
DOCUMENTS & RECORDS

Sl. No.	Document/ Record/ Register	Responsibility	Type	Remarks
1	Lead Register	CS Executive		

LEAD GENERATION

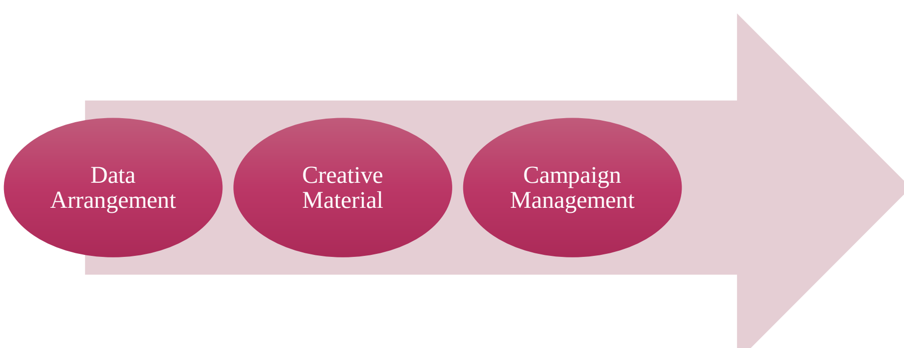
For us, lead basically refers to enquiry for service from a prospective client. We may receive leads through mail/ calls/ personal communication.

We cover the following aspects in our lead generation process.



MAILING

Mailing activity requires control over the following processes



DATA

- We can arrange data from

    a) Data Collection through online Sales
    b) Data Collection through online form submissions
    c) Data Collection through HR Database
    d) Physical data creation from Directories & other Sources (India Mart, fundoo Data etc.)
    e) Newspaper data collection (Classified, Accounts vacancy ad etc.)
    f) Data of touched clients & past prospects for future references (Past Client List, Proposal Register, Card Holder, Our email IDs)
    g) Just Dial references
    h) Selling Product with No cost/ No profit (Book, Formats etc.)
    i) Commission to Associate
    j) Linked in
    k) Old gathered data
    l) Accountant vacancy ad on net

- Data must satisfy following criteria

    a) Relevance (Target Client Base)
    b) Freshness (Data must be current)
    c) Quantum (Activity Size)
    d) Decision maker data (Owner, Director, CEO, CFO, CMD)

CREATIVE MATERIAL

- Creative Mailing Material is identity of Neusource; we may use

    a) X-Ray Film
    b) Photo – Frame
    c) Jewellery Box

- Mailing Piece includes

    a) Mailing Piece
    b) Accompanying Brochure/ Folder
    c) Envelop

- All material must be Logo Bearing, Printed and Innovative
- Mailing piece may be of following types

    a) Regular
    b) Special Occasion (Diwali/ New Year/ New Financial Year/ New Rulings)
    c) Informative

MAILING CAMPAIGN

- Each campaign must have a minimum data size of 200
- Data must be carefully selected
- No envelop should go on ignorant data or without name of concerned person
- Data of all campaign with results drawn should be maintained separately
- Campaign Tracker must bear following Fields
    - Company Name
    - Concerned Person
    - Designation
    - Address
    - Website
    - Delhi/ NCR zone
    - Phone No.
    - Date of dispatch
    - Remarks
- All Campaign data separately should be maintained
- Each Campaign plan should be approved by board

REFERRALS

- Referral can also be used as a mode of Indirect convincing (Mediation)
- Referrals can be of two types
- Third Party referral programme includes Following Activities

- Prepare list (Also Personals)
- Regular Meeting Plan
- Finalise incentive plan
- Send referral letter with a guide "what they should tell about us to reference" (Including Testimonials or what our client says)
- Follow up
- Thank you letter with a gift
- Client gained/ Non converted letter
- The collaborators of company may also be profiled, which may include various suppliers, distributors and other channel partners.
- An analysis of complementary products may also be performed.

- Client referral programme includes Following Activities
  - Letter for implementing the work flow and how they may get benefited
  - Renew Annual Contract (with free IMS)
  - Follow-up
  - Send them feedback form
  - Follow-up
  - Send Them Testimonial Letters
  - Follow up
  - Meeting
  - Finalise incentive
  - Finalise matter "what they tell about us to reference"

    (Including Testimonials or what our client says)
  - Referral letter
  - Follow up
  - Thank you letter with a gift
  - Client gained / Non converted letter
  - Client meet seminar

ONLINE MARKETING

- Maintenance of "www.neusourceindia.com" includes 2 Activities
    - Material Updates
        - Monthly News Letter
        - Forum Management
        - Content Updating
        - Blogs on website – Posting & Commenting
        - News on Website
        - Payment gate Way
        - RSS feeds

    - Designing of Content
        - Currently Outsourced to Amit

          (Requirement from amit listed on google drive)

- Website Promotion (SEO) is outsourced to Amardeep we control his performance through 2 Models
    - SEO Activity monitoring (offline)
        - Press Release Submissions
        - Articles Submissions
        - Natural back links
        - Anchor text diversity
        - Bookmark real content to leading Bookmarking sites as digg, delicious etc.
        - Forum Posting
        - Guest blog posting
        - Web directories
        - Classified
        - Competitor Activity Analysis
        - Link Exchange

- SEO result monitoring
  - Keyword status monitoring
  - Enquiry count monitoring

- Social Media Management
  - Face book
  - Twitter
  - You tube channel
  - Google+ page
  - Online Forum
  - Managing & Creating Social Media Content

- E-Brochure mailing
  - After 1 month of snail mail post and in case of no response we email them our e brochure
  - Gap between 2 brochures should not be less than 45 days and more than 60 days.
  - Special drive for old leads may be made
  - Mail Client Sites (simplycast.com, mailchimp.com, aweber.com) may be used for the purpose.

OTHER MODE OF LEAD GENERATION

- Exhibition Presence
  - Gifting & Stalls
  - Performances

- Seminar
  - Book & NGP

- Networking & PR
    - Preparation of LinkedIn profile of Staff
    - Search of networking event
    - Participation in events
    - Relationship Management
    - Data Management
    - Sorting Data & using as List

- Brand Creation
    - Print Media Presence
    - Electronic Media Presence
    - News Creation
    - Press Release
    - Media Relations
    - Improving Corporate Image

MEETING MANAGEMENT

LEAD HANDLING

All received leads are entered into lead register as soon as they arrive. Column of Lead register are as follows:

- Sl. No.
- Name
- Designation
- Company Name
- Address
- Mobile No.
- Mail-id
- Source of Information
- Service asked for
- Website

ATTENDING LEAD AND GENERATION OF MEETING

- Telephonic Response to enquiry
    - Call answering script (If client call directly)
    - System of Qualification of lead
    - Remorse letter (if rejected)

- Mail Response
- Follow-up
- Meeting confirmation mail or letter
- Send booklet (Received by Prospect Client before meeting)

MARKETING MEETINGS

- Preparation of meeting requires
    - Visiting card
    - Booklet
    - Book
    - How We Start Video
    - How we do video
    - Client panel PPT
    - IMS PPT
    - Blue Form
    - MIS list
    - Start-up Guide

- Meetings must be taken care for
    - Effective Presentation
    - Art of Gifting
    - Genuine Courtesy
    - Do's & Don'ts of Effective Meeting

- Meetings must be attended by at least 2 persons; however considering the client profile one person can go for the meeting. Person going for the meeting must give a demo to the board.

MEETING FOLLOW-UP

- Regular quality upgrading follow-ups
- Still we do not press a prospect we just collect acceptances

START-UP PROCEDURE

SRM MEETING TO START-UP

- To start-up a client it's the duty of CS executive to take the SRM for first client meeting and introduce him with the client.
- In exceptional cases. SRM may also be requested to attend the first client meeting alone but CS executive must co-ordinate the meeting over phone.
- See the relevant content of start-up guide (as below)

<u>Before actually putting up the team SRM shall visit the client to draw the following Results (Initial Set-up Meeting) – Marketing person shall also accompany</u>

a. Mutual introduction of client (Ideally the first client SRM meeting)
b. Asking Challenges he may face on the Job
c. Telling his experience about challenges on their job
d. Getting Managements' Opinion, *Existing system & improvements expected* on
    i. Previous pending jobs – refer checklist
    ii. Input & Output System – refer checklist
    iii. Control System (Critical Point of Control) – refer checklist
e. Additional requirement for software setup – refer checklist
f. Any other Instruction/ Expectation of Client
g. Discuss on Final Charges Requirement after considering
    i. Previous pending jobs
    ii. Software set-up requirement
h. Collect Blue form & Relationship Cheque
i. cross confirm
    i. Assignment/ Activity detail from client
    ii. MIS report format confirmation
    iii. Discuss start-up procedure
    iv. Input/ Output Chart
    v. Point of Controls

OPENING CLIENT CODE & ASSIGNMENT CREATION

- As this start-up meeting shall result in signed blue form & various other terms fixed –up; now CS executive shall create client code and make the first assignments as directed by SRM.

THANK YOU KIT

- Start-up meeting shall also result in fixed –up terms for sending the client thank – you kit.
- Kit shall be send by snail mail and won't be send without approval of SRM
- Kit basically includes
    - Printed CD & Printed CD Box
    - One Letter of Client Code and password
    - Envelop

- Content of CD shall be
    - Service agreement- Scan copy of "blue form" duly approved
    - Assignment Detail – Collect Soft copy from SRM
    - Reporting Format- Collect Soft Copy from SRM
    - How we Start presentation PDF
    - How we Proceed presentation PDF
    - How to use Client panel presentation PDF
    - How to use IMS presentation PDF
    - Escalation Matrix presentation PDF
    - Client Policies presentation PDF
    - Client value Statement presentation PDF

COORDINATION AND WATCH-UP – NEW CLIENT

CS Executive shall cross control over every new start-up and shall look over the deviations in start-up from the start-up guide.

GENERAL CLIENT MANAGEMENT

CLIENT MASTER DATA MANAGEMENT

- CS Executive shall manage 2 Client Trackers
  - Retail Clients
  - Regular Clients

- Client Tracker shall bear the following fields
  - Sl. No.
  - Client Name
  - Category A/ B/ C/ D
  - Authorized Person 1/ Designation/ Mobile/ Mail id/ DOB
  - Authorized Person 2/ Designation/ Mobile/ Mail id/ DOB
  - Authorized Person 3/ Designation/ Mobile/ Mail id/ DOB
  - Annual Turnover
  - Tax Audit (Y/N)
  - Statutory Audit (Y/N)
  - Annual Billing Prospected
  - Last Year Billing Actual
  - Actual Direct Expenses
  - Expected Annual Contribution
  - Major Service Area
  - Current Action
  - Remarks

- This tracker is useful for various Activities & Management decisions

RELATIONSHIP MANAGEMENT

- Currently we are running three drives for improving relationship with clients
  - Client Birthday Management
    - Regularly Printed Card to be sent

  - Feedback letter & Follow up
    - Only good feedback required hence settle the client first
    - At least 1 feedback from retail and 2 from regular in one calendar year required

  - Testimonial letter & Follow up
    - Maximising the testimonial is target for us
    - Testimonial should be in fixed format with visiting card & photo

COMPLAINT MANAGEMENT

- Manage Client Complaint, Grievance Collection & Settlement
- All tickets are to be responded asap
- Response to tickets shall be queried from the team through threads
- Team is directed to respond on CS threads on utmost priority

CLIENT DIGGING

- CS Executive shall analyse assignments of different clients on fortnightly basis to draw following conclusions
  - Client with 0 Assignment
  - Client with missing Assignments
  - Client with lower billing
  - Excess Resource planned
  - Other Observation

- CS Executive Shall submit its report to SRM each fortnight with following recommended actions
  - Delete Client ID
  - Make Assignments
  - Delete Assignments
  - Resource re-planning

TOUCHING THE HEARTS

CREATING MOMENTS OF TRUTH

- Board Shall decide an action each month
    - Greetings
    - Reminders
    - Knowledge Updates
    - Recording of Interests
    - Plan launching & keep-in-touch concept

IMPLEMENTING THE CLIENT VALUE STATEMENT IN BEHAVIOUR

- These points shall be brought into our habit
- Actions are yet to be decided

CLIENT MEET

- Board Shall decide an event annually

APPENDIXES

- Email List
- Data Folder
- Creative Material (CDR/ PDF Format) Folder
- Campaign Data
- Client Value Statement
- Choose your MIS
- Package Details
- Meeting Checklists
  - Previous Pending Job
  - Software setup checklist