

MODULE	RESPONSIBLE OWNERS	A	CAMPAIGN: Generates Traffic	B	LEADS: Lead/Prospect Generation	C	OPPORTUNITY: Signup as prospect	D	DEAL: Signup as customer	E	ORDER: Gives Order
CRM	Value Stream Process		Goals>Target>Research>Budget>Content		LeadAssigned>Initiated>Established>Opportunity		New>Qualify>Proposition>Negotiation>Decision		Prospects>Customer		Customer>Supporter>Ambassador>Partner
DIR	Director	x	Campaign Performance	x	Salesmen Performance	x	Sales Forecast	x	Product Performance	x	Customer Lifetime Value
MGR	Manager	1	Sets Budgets/Territories	1	Sets Salesmen Targets	1	Sets Incentives	1	Sets Pricelist	1	Sets Scheme/Free Value Offer
MAS	Marketing	2	Design Campaigns/Contents	4	Prepares Salesmen Call/Travel Plans	6	Checks Opportunities	15	Approves Offer	20	Approves Order
SFA	Salesmen	3	<i>Work on Campaigns&gt;Generate Leads</i>	5	Contacts/Sign Prospects as per callplans	7	Followups Prospects	16	Delivers & Followup Offer*	21	<i>Delivers OA: Order Ack*</i>
ALL	Prospect	3	<i>Gets Awareness via Campaign&gt;Generate Leads</i>	5	Fills Landing Page>Signup as Prospects	8	Asks for Trial/Demo*	10	Asks for Offer/Discounts etc.*	18	Places Order* OR Loops from pt. 10
CSS	Customer	3	<i>Customer Referrals&gt;Generare Leads</i>	5	Fills Landing Page>Signup as Prospects	8	<i>Signup as New Customer*</i>	17	<i>Gets Automated Offer*</i>	22	<i>Gets Order Acknowledgement*</i>
PSS	Partners	3	<i>Affiliated Partners&gt;Generate Leads</i>	5	Fills Landing Page>Signup as Prospects	8	<i>Signup as Affiliated Partner*</i>	17	<i>Gets Automated Offer*</i>	22	<i>Gets Order Acknowledgement*</i>
TCM	TechnoCommercial					9	<i>Gives Demo/Trial/Estimates/Customer Ref*</i>	11	<i>Creates Final RFQ*</i>	18	Enters Customer Account/Sales Order*
COM	Commercial					9	<i>Create Product Estimates/Rate Analysis</i>	14	Creates Product Offers/Proforma Invoice	23	Create Invoice and Delivery Schedule*
ENG	Engineering					ii	<i>Tender Item TBOQ/RateAnalysisBOM Prepared</i>	13	<i>Designs Draft TBOQ/BOM/Process</i>	19	<i>Gets Final BOM/PROCESS Approved</i>
MRP	Planning	3	Marketing Planning	4	Sales Pipeline/Call Planning	ii	<i>Tender: Item Delivery Plan prepared</i>	12	Find ATP Dates for Offer	19	<i>Runs MRP. Provides ATP Dates*</i>
FRM	Financial	3	Budget/Billed+Used/Unused/Payments	4	Travel/Advance/Budget/Claim/Settlement	ii	<i>Tender Purchased/Costing/Profits Prepared</i>	iii	<i>Orders/Tender: Costing/Profits/Credit Checks*</i>	iv	<i>Create Project, Customer and its Cost Centers</i>
PRJ	Project	i	<i>Tender Agency &gt; Generate Tender Leads</i>	i	<i>Pre-Tender Search&gt;Approve&gt;PQMatch&gt;Bid/NoBid</i>	ii	<i>Tender Bid Prepared</i>	iii	<i>Tender:Purchase&gt;Bid-Submit&gt;Open&gt;Won/Lost</i>	iv	<i>Post Tender: Won:Project&gt;OA&gt;PO&gt;Agr&gt;EMD</i>
CRM	Direct Online Channels		Website, SM Advts.		Website Contact or Landing Page		MS Teams, Webex		eCommerce, Chatbot, Email, MobileAPP		eCommerce, Chatbot, Email
CRM	Direct Offline Channels		BulkEmails, Callcenter		Phones, Emails, WhatsApp, FB Chats		PPT, URL Access		Retail POS, SelfChekout Kiosks		Retail POS, SelfChekout Kiosks
CRM	InDirect Channels		Physical Visits, Events		Physical Visits, Events, Webinars		Physical Visits		Distributor, Wholesaler, Retailer		Distributor, Wholesaler, Retailer

\* Can be Automated

\*\* Things in italics can be optional