Business Process Map



Receipt of Referral / Lead



Prospecting of Lead (Request for Information)

Creation of portal for prospect and complete fillable PDFs or Info Requests as part of the company's prospecting and lead details capturing



Content Packages to auto deliver Standardized Documents & Disclosures



Scheduling of Meetings

Use vCard links to book client meetings



Filling up of Questionnaires

Complete fillable PDFs for business or dealer submission

Approval and Client Signature





Shortlisting of Offerings

Upload and communication of Shortlisted
Offerings to the client





Collection of Documents

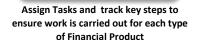
Info Requests or Simple File Requests to collect documents needed



Official Onboarding

Info Requests or checklists with links to 3rd party platforms to collect information about family, estate, income/expenses, assets and liabilities, etc

Application and Execution (PMO)





Uploading client related Investments, Insurance and other related documents



Client Survey

Automated push of Client Survey to the client for effective feedback





Payment of Commissions to Third-Parties

> permissions for all relevant parties

Collaboration

Sharing with Finance Team/
External Bookkeepers

Collaboration permissions for all relevant parties to have access to the Portal



Annual Review and Questionnaire

Automated Annual Questionnaire (Fillable PDFs) to understand clients' requirements better



Know Your Customer (KYC) Updation

Clients can update their information – email, mobile number etc. in the portal



Monthly / Periodic Communication

Blast delivery of content, or Content Packages to distribute

