



Hydra Engagement And Sales Management

Hydra

Engagement Management Desk

- Contact management (From 'Target' to 'Prospect').
- Campaign Creation
- Campaign Administration
- Resource Management

Sales Management Desk

- Contact management (From 'Prospect' to 'Client')
- Pipeline management
- Sales cycle management
- Counterparty management
- Product management
- Resource Management

Engagement Management Desk (EMD)

Contact management

- Creation and interaction with an individual.
- Minimal data input required to create an individual (3 items)
- Interactions build client focused data set.
- No formalised fact find need be used

Campaign Creation

- Fully audited workflow with appropriate approvals
- Builds Email, Telephone and combined campaigns.
- Staged approach ensures solid foundation to all campaigns
- Correct information available to correct business function at correct time.

Campaign Administration

- Bulk import of contact list / data
- Real time update of campaign records
- Automated routing by response type
- Automated email response
- Direct allocation of completed campaign records to appropriate sales resource.
- Ability to use external marketing resource.

Resource Management

- Load balancing of marketing resource to process information
- Rules based approach for appropriate sales resource (Skills Matrix)

Sales Management Desk (SMD)

Contact management

- Interaction Management
- Document Storage
- Templated Document creation
- Note management
- Task Management with alerts into outlook
- Email sending

Pipeline management

- Sales requests auto forwarded to team leaders for allocation
- Pipeline reporting

Sales cycle management

- Administrative requests auto forwarded to team leaders for allocation
- Application of predefined product checklists
- Allows 'Just In Time' processing of client data
- Sales reporting

Counterparty management

- Creation
- Segmentation
- Rating
- Logging of contracts

Product management

- Creation
- Approval
- Real time status management (Active, On Hold, Capped Out)

Resource Management

- Rules based escalation procedures
- Rules based real time allocation of resource



THANK YOU