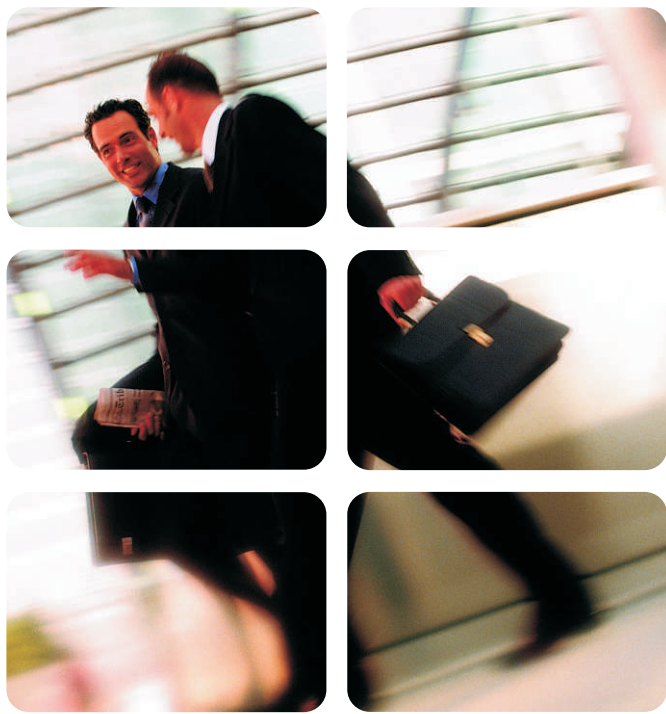


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Channel Management Solution for Retail Financial Services

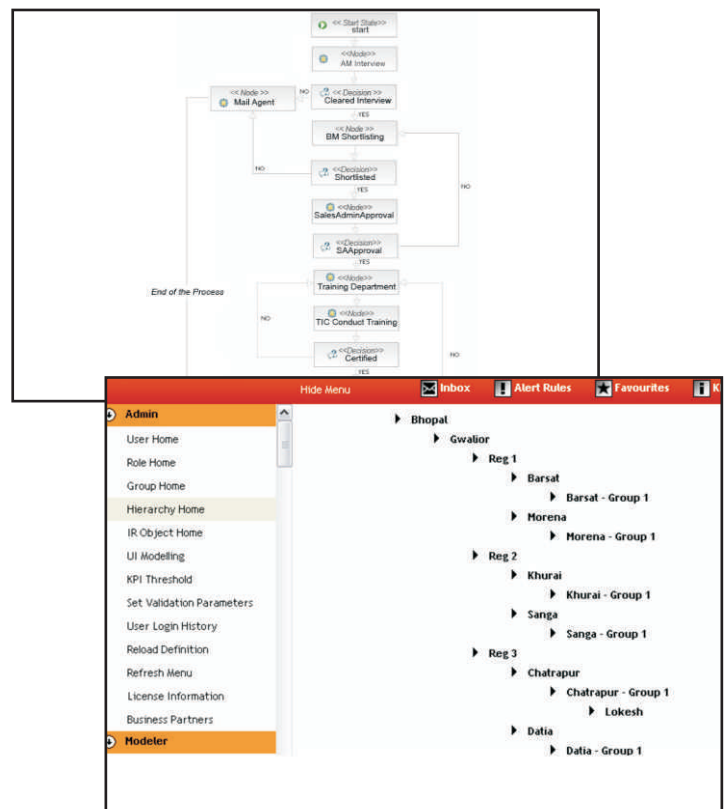


Support rapid growth of sales teams

The sales and distribution hierarchy is diverse and dynamic with complex interplay of direct & indirect channels. Constant expansion of this hierarchy and manpower churn requires frictionless on-boarding of new sales teams with due emphasis on regulatory compliance.

Our process oriented module for enrollment, training, evaluation and activation for sales teams puts business managers in full control of the on-boarding processes. This enables complete visibility of internal & external activities and monitoring of adherence to compliance.

Channel Management Solution for Retail Financial Services

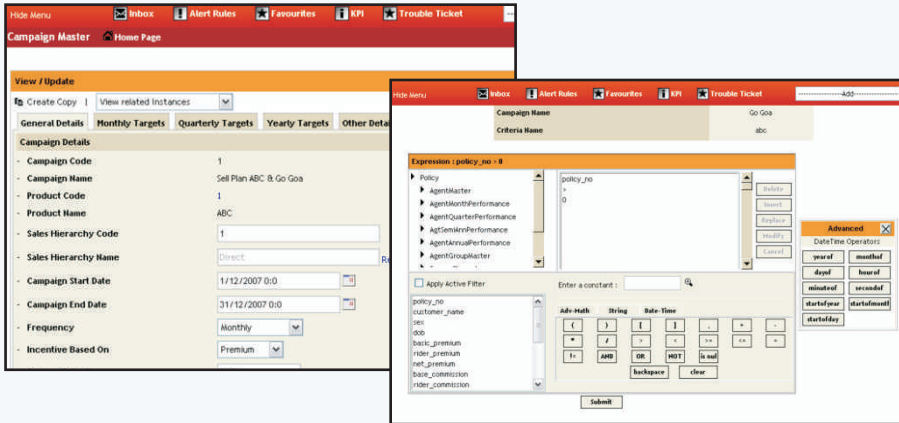


Flexibility and ease of maintaining and managing complex diverse sales hierarchies and on-boarding processes for sales teams



Sales activities are influenced by both long term strategies and short term tactical initiatives. Compensation policies and schemes need to be continually reviewed and designed to derive the expected behaviors from channels and to do so in a proactive and dynamic manner.

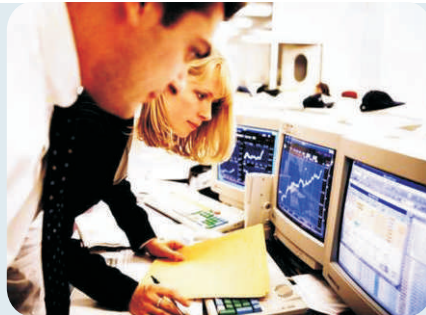
Define Compensation policies to align sales activities to business goals



Our solution enables definition of highly flexible and targeted compensation, contest and “reward and recognition” schemes based on geography, channel type, period, product, value, volume, past performance, targets and channel & sales demographics.

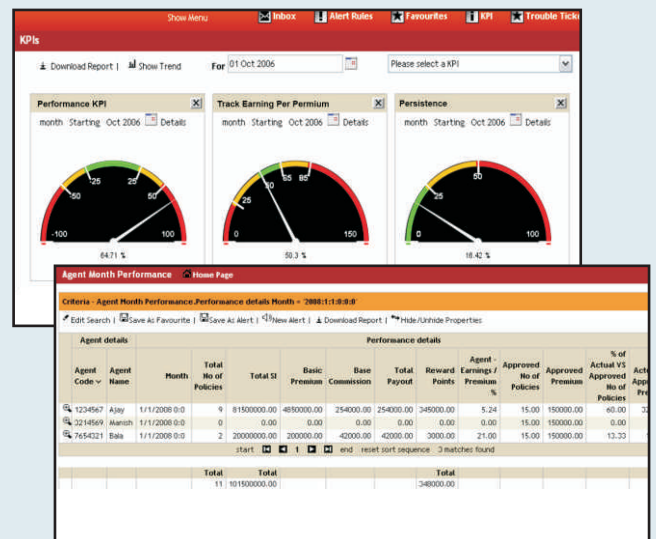
Flexible definition of incentive schemes and business rules by business owners enables agile response to market dynamics

Monitor & drive performance



What cannot be monitored cannot be controlled. Senior managers and sales people need real time visibility of sales performance to be able to continuously drive channel performance.

Our solution provides real time visibility of individual & team performance giving business managers real time insights on channel performance at various levels of granularity. Self Service for channel participants gives an up-to-date view of performance and accrued incentives. This enables in-time alignment of sales activities to maximize rewards and thereby achieve organizational objectives.



Alignment of sales activities to maximize rewards and achievement of organizational objectives

Channel Management Solution for Retail Financial Services:

Acquire Channel Sales Force Efficiently

- Manage the process of pre qualification, training and certification of candidates
- License, activate and attach sales teams to the channel hierarchy
- Maintain channel hierarchy and micro segmentation of channel profiles

Monitor Channel Performance Proactively

- Gather and aggregate the business plan from the field in a disciplined manner
- Detect deviations in target achievement vis-à-vis business plan
- Take proactive actions on incentives, contests and promotions

Reward Channels Effectively

- Define granular commissions, incentive schemes and “rewards and recognition” programs
- Automate computation of commissions, incentives and rewards to each channel participant
- Communicate performance achievement and incentive accrual

About Herald Logic:

We are a provider of sales & distribution solutions to financial services companies. Our technology & solutions automate mission critical processes to achieve dramatic performance improvements.

Our solution approach and methodology, is based on being non-intrusive and sustainable which supports accelerated time-to-market of the strategic & tactical initiatives of our clients.

Key concepts that we introduce and operationalise are:

- **A Sense And Respond** paradigm for managing channels and distribution
- **A Proactive Performance** monitoring paradigm in which business users can monitor performance of products, channel participants and business units
- **A Business Self Service** paradigm in which the control of the business wrests with the business! This means lowered dependency on IT Vendors and personnel

