Date

BDG-P-001 Business Development Procedure (7.2.1)

Prepared by	Approved by	Authorised By
Name: Title Date:	Name: Title: Date	Name Title Date

BDG-P-001 BUSINESS DEVELOPMENT PROCEDURE (7.2.1)

PURPOSE

To ensure that all necessary information from marketing through to account management is documented, actioned and recorded appropriately in a controlled manner.

To ensure all business activities are subject to the CHH Business Plan.

SCOPE

To be undertaken as and when, a new sales enquiry for an existing or potential customer is received.

ASSOCIATED RECORDS AND RETENTION PERIODS

Record Description	Location	Active Retention Period*	Archive Location	Archive Retention Period*
Proposal (BDG-F-003)	CRM	2 years		3 years
Non Disclosure Agreement (BDG-F-004)	CRM			
New Business Opportunity (NBO) Profile (BDG-F-005)		N/A		N/A

**Default record retention period is two years unless otherwise stated by the customer or legislation.*

SCANNED DOCUMENTS

Documents which are scanned and attached to CRM records can be shredded or thrown away if originals are not required for legal reasons. Documents are scanned in PDF format for security purposes.

DEFINITIONS:

NBO	New Business Opportunity	**BWD**	Business Working Days
RFQ	Request for Quotation	**CRM**	Customer Relationship Management
NDA	Non- Disclosure Agreement	**RT**	Relationship Type
LGS	Lead Generation Status		

RELATED DOCUMENTATION:

BDG-P-002	RFQ Procedure
BDG-S- 001	Order Creation Support document

HEALTH AND SAFETY STATEMENT

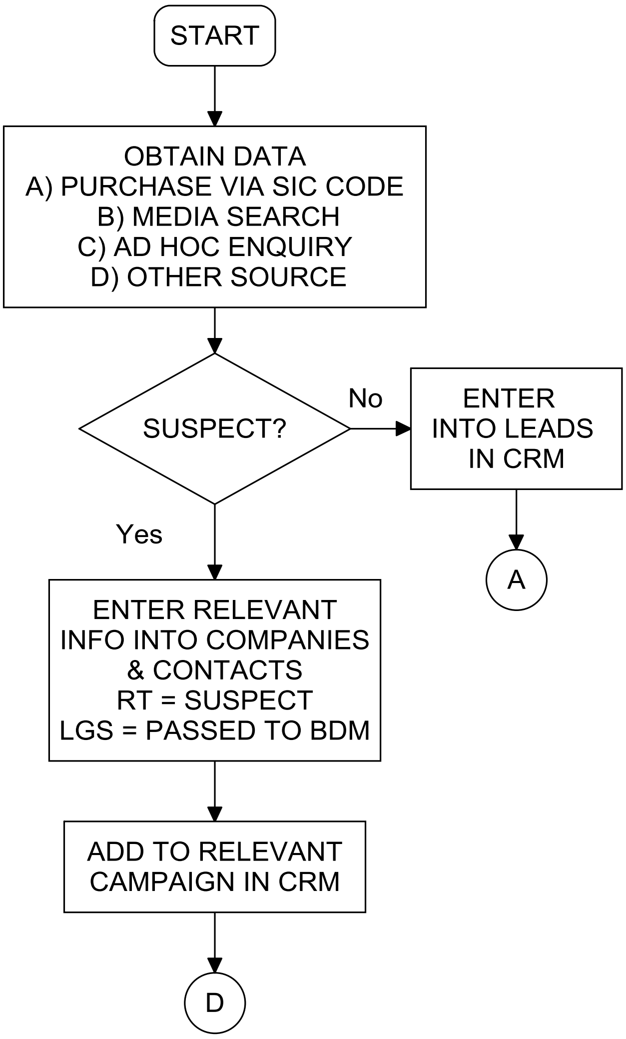
N/A

ENVIRONMENTAL STATEMENT

N/A

Flow Chart	1 MANAGEMENT RESPONSIBILITIES
	Sales and Marketing Director is responsible for ensuring that targets are set and the team are working towards them. CRM Manager is responsible for ensuring that the data in CRM is clean and up to date. BDM's and Account Managers are responsible for ensuring that their activity is recorded in CRM in a timely manner.

Flow Chart



2 LEAD GENERATION

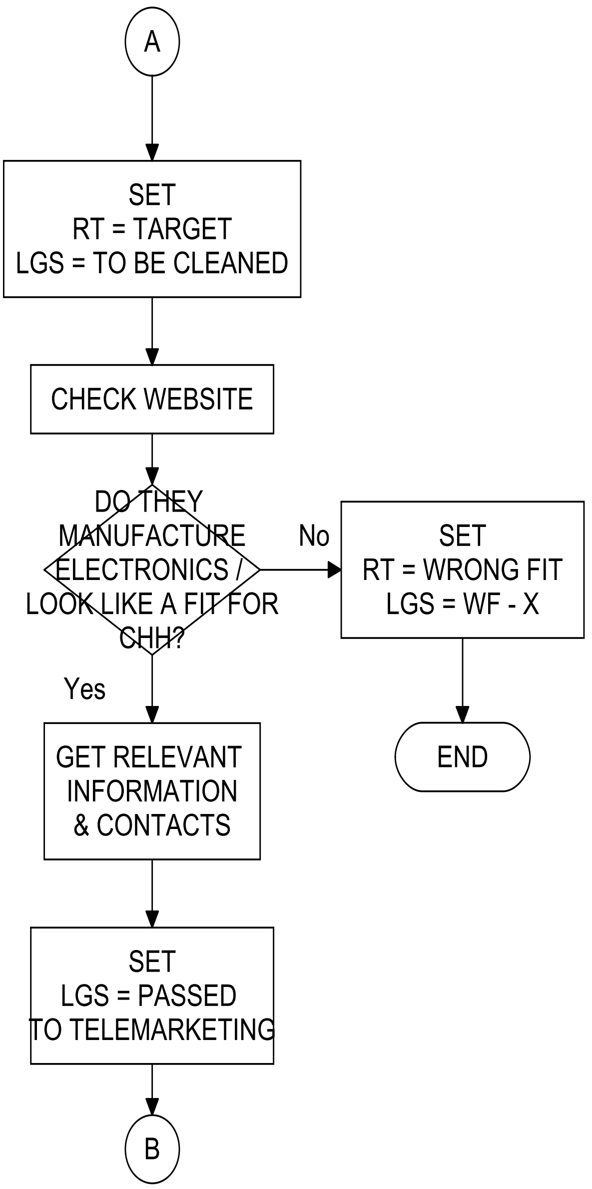
2.1 A sales lead or enquiry can be initiated by various means:

2.2 When a lead comes into CHH the first stage is to determine if it is a SUSPECT.

2.3 If YES it goes straight into COMPANIES and CONTACTS with ALL of the relevant data, the RELATIONSHIP TYPE (RT) is set to SUSPECT and the LEAD GENERATION STATUS (LGS) is set to PASSED TO BDM and BDM / Account Manager follows this procedure until an RFQ is generated then follow BDG–P-002.

2.4 If not a SUSPECT go to 3 – data cleansing.

Flow Chart



3 DATA CLEANSING

3.1 Where data is purchased or obtained from an external source and it is not a SUSPECT it is entered on the CRM system within the LEADS section with RT set to TARGET and LGS TO BE CLEANED.

3.2 TO BE CLEANED – all data with this status will then go through the following process:

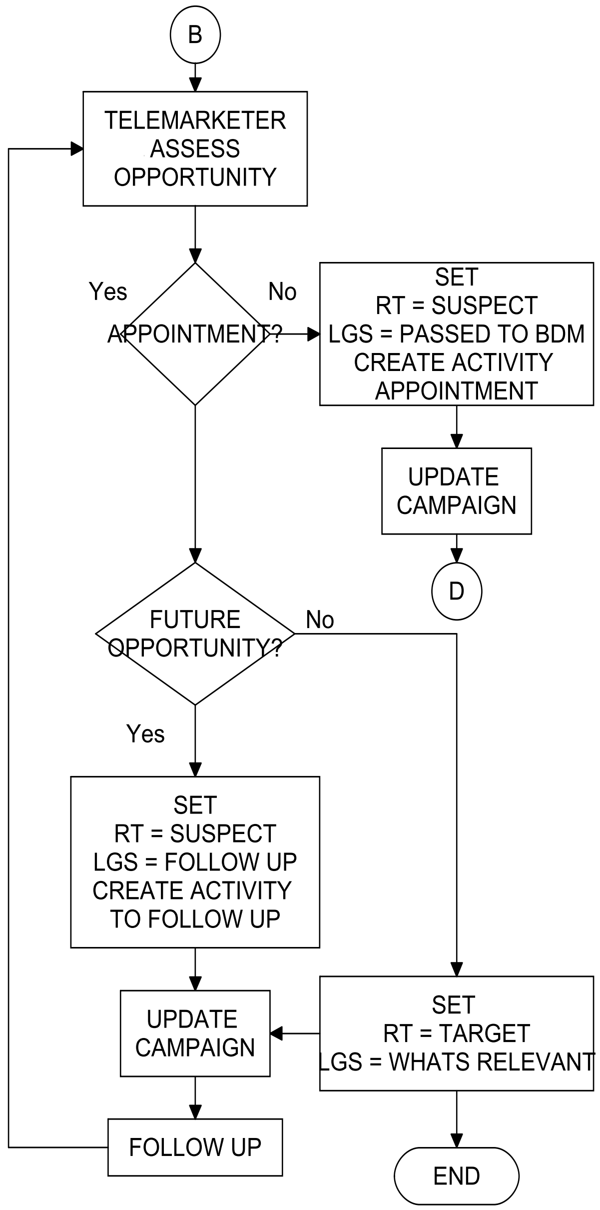
3.2.1 Website is checked to ensure that the company looks like it makes a good fit for CHH
3.2.2 Update the CRM record as fully as possible, e.g. address, telephone number, industry etc.
3.2.3 The company is called to collect the relevant contacts and their email address e.g.:-

- Purchasing Director or Manager
- Operations Director or Manager
- Person responsible for electronics/cable outsourcing

3.3 If the record does not fit the CHH NBO profile it is marked as such (e.g. RT - WRONG FIT) and it does not go to the next stage. The LGS must be set to reflect the wrong fit reason.

3.4 If the record passes the first stage of the New Business Opportunity (NBO) Ref BDG-F-005) profile the LGS is changed to PASSED TO TM, where it will be called to further understand the profile and to assess if there is an opportunity and potentially make an appointment

Flow Chart



4 TELEMARKETING

4.1 Telemarketer calls to assess requirements and if there is an immediate opportunity makes an appointment or passes to BDM to make appointment.

4.2 RT is set to SUSPECT and LGS is set to PASSED TO BDM.

4.3 The LEAD is converted to COMPANY/CONTACT and optionally OPPORTUNITY (for opportunity follow BDG- P-002)

4.4 ACTIVITY is created to record the appointment.

4.5 If the opportunity is not immediate then LGS is set to FOLLOW UP. ACTIVITY is created to record the follow up call.

4.6 If there isn't any opportunity, set RT to TARGET or WRONG FIT and set LGS to the relevant status (ACTIVE or WF – X).

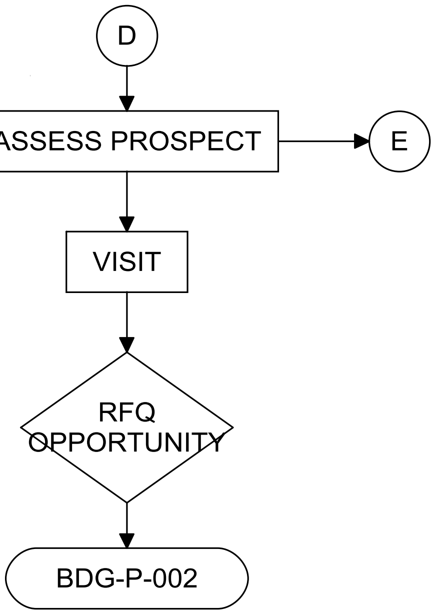
Please refer to BDG-S-001 for RT and LGS field meanings.

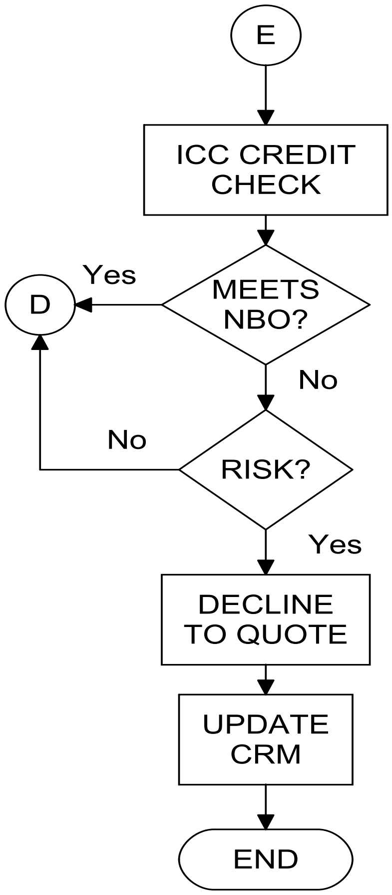
Flow Chart

N/A

5 ADHOC ENQUIRY

5.1 Where an enquiry / lead comes in, it is partially qualified via a conversation (BDM / Acc Man) and then it is cleaned, checked and qualified as above.

Flow Chart	6 BUSINESS DEVELOPMENT PROCESS
	6.1 At the appointment the BDM will assess if the prospect has a good business fit with CHH and what the opportunity comprises of. 6.2 Following a visit out to the prospect the next stage of the sales process is usually a visit from the prospect to CHH to assess our capability. 6.3 The RT field within CRM will be changed to reflect the stage the opportunity is. (SUSPECT, PROSPECT). Refer to BDG-S-001 for RT and LGS field meanings. 6.4 Where known enter TAM/SAM and other relevant CRM data.

Flow Chart	7 CREDIT CHECK
	7.1 When an appointment is made the credit check is usually undertaken. This is done with the ICC system. The system returns a numeric value. 7.2 ICC Credit system is used to check:- ▪ Company number ▪ Credit limit and risk score ▪ SIC code ▪ Ultimate holding company ▪ Turnover / profit ▪ Date last accounts 7.3 This data is entered into CRM and ICC check ticked. 7.4 If credit check ok, sales process proceeds as normal. If not risk assessed, if good sales process proceeds, if not decline to quote.

Flow Chart	8 DECLINE TO QUOTE
N/A	8.1 If the BDM decides to decline to quote then a communication is made via phone and followed up with an email sent through the CRM system. 8.2 RT & LGS are set accordingly.
Flow Chart	**9 NON DISCLOSURE AGREEMENT (NDA)**
N/A	9.1 An NDA, ref BDG-F-004 is then generated to protect the Intellectual Property (IP) of each party. The purpose of signing an NDA is to allow free and open communication between both parties without jeopardising relationships that either company may already have. 9.2 Either CHH or the customer will generate an NDA. Which is signed by both parties 9.3 The signed NDA is scanned and attached to the CRM record. 9.4 Providing all parties agree that there is potential for a partnership the prospect will pass an RFQ to CHH.
Flow Chart	**10 FOLLOW UPS**
N/A	10.1 Companies placed in follow up are called when the follow up activity becomes due. 10.2 They then follow the procedure from B.
Flow Chart	**11 CRM UPDATES**
N/A	Following each interaction with the prospect the CRM system is updated.