Business Process Map

SIDEDRAWER™ VALENTA

1. **Receipt of Referral / Lead**
2. **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
3. **Automated Distribution of Disclosures**
   Content Packages to auto deliver Standardized Documents & Disclosures
4. **Scheduling of Meetings**
   Use vCard links to book client meetings
5. **Filling up of Questionnaires**
   Complete fillable PDFs for business or dealer submission
6. **Official Onboarding**
   Info Requests or checklists with links to 3rd party platforms to collect information about family, estate, income/expenses, assets and liabilities, etc
7. **Collection of Documents**
   Info Requests or Simple File Requests to collect documents needed
8. **Financial Need Analysis**
9. **Shortlisting of Offerings**
   Upload and communication of Shortlisted Offerings to the client
10. **Approval and Client Signature**
    Digital signature and approval of recommendation from the client
11. **Application and Execution (PMO)**
    Assign Tasks and track key steps to ensure work is carried out for each type of Financial Product
12. **Storage of Investments / Financial Products**
    Uploading client related Investments, Insurance and other related documents
13. **Client Survey**
    Automated push of Client Survey to the client for effective feedback
14. **Commission Calculations and Reconciliations**
15. **Payment of Commissions to Third-Parties**
    Collaboration permissions for all relevant parties
16. **Monthly / Periodic Communication**
    Blast delivery of content, or Content Packages to distribute
17. **Know Your Customer (KYC) Updation**
    Clients can update their information – email, mobile number etc. in the portal
18. **Annual Review and Questionnaire**
    Automated Annual Questionnaire (Fillable PDFs) to understand clients' requirements better
19. **Sharing with Finance Team/ External Bookkeepers**
    Collaboration permissions for all relevant parties to have access to the Portal

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