Effex Business Solutions Pvt. Ltd.

Corporate Identity Number: U72900MH2011PTC220864

Scope of Work

Greetings,

We take pleasure in sharing with you the scope of work to streamline operation for the growth business.

The scope of work will take life in the following stages:

- **Evaluation** – This is stage when we will brainstorm with the leadership, talk to the staff to get grip of the current culture and working methods, their motivations and concerns. This will help us define better processes that work for them.
- **Design** – This is the stage where we start designing each of the above-mentioned process/SOP/policy. Please note these systems will be written documents, excel formats or no cost available applications which can be converted into an enterprise software in the future if the leadership decides to do so. Software automation is not scoped for in the current proposal.
- **Implementation and Review** – In this stage everything that is designed is communicated to the staff, assistance is provided to use the systems provided and periodic scheduled reviews are conducted to know the performance and changes or updates required.
- **Improve and sustain** – Here the changes/improvements identified during the review are made and activated.

Let us understand the details of each deliverable:

Propel Growth Planning & Execution

Propel Business Modelling– This activity allows entrepreneur to build business strategy using a world class business-tool called Business Model Canvas. It ensures that the strategy of the business is deeply thought through various critical aspects like customer segmentation, offer, approach and a lot more. This activity ends with the business making a financial deck for the strategy arrived at.

Propel Sales Analysis and Planning – The Sales Analysis process covers imperative aspects like market penetration, market development, product development and diversification (when needed). Sales planning helps you plan, what must be sold, to who and how much. Sales targets ae set accordingly.

Propel Sales Training – Our sales training offers a structure which helps the prospect navigate through the information he has about competing products and services, helps analyze pros and cons, walks him through the decision-making process and makes the sale happen.

Propel Sales Tracking Mechanism –Our Sales Tracking mechanism on MS-Excel or Google Sheets, gives deep insights to the business by keeping track of sales done from existing/new customers, sales cycle time, cost of sales, missed follow-ups and much more.

Propel Sales Performance Scorecards – Sales scorecard helps measure all ingredients of the sales effort and therefore calculate incentives, handle appraisals and promotions in the sales team. Parameters could be credit period offered, number of new customers added, business from existing customers, cost of sales, adherence to the sale activities planned etc.

Propel Operational Processes

Propel Order Management Process – Order Management System helps you create multiple orders for the same client, track every transaction, partial dispatch or batch-wise dispatch, track pending orders, dispatch and delivery details and a lot more.

Propel Project Management Process – Propel Project Management process helps in creating project with ease, create task within projects, schedule tasks with start time and end time, assign task owners and check task reports by statuses.

Propel Inventory & Warehouse Management Process – This process covers every relevant aspect like SKU creation, digitization of inward and outward of inventory, accurate visibility of what is in stock for purchase planning, visibility of consumption patterns for sales and purchase planning, ease to locate product with racking system, identify hidden cost associated with non-moving inventory, takes away dependency on one person to manage the warehouse, to name a few.

Propel Purchase Process – Purchase process helps a business statistically arrive at re-order levels and quantity of purchase. Also helps with budget allocation, vendor on-boarding criteria and much more.

Problem Solving | Growth Planning | Performance Improvement

Propel Production Planning Process – This process helps with clear visibility of committed turn-around time for orders, resource (manpower) requirement to execute order, scheduling of machinery, visibility of availability of raw materials in stock, effective shop floor communication, change over time reduction and way more.

Propel Collections Process – The Collections process helps arrive at prioritization on what invoices and accounts to collect on, smart ways to not miss payment follow ups, payment follow up methods, proactive ledger calibration with debtors, black/grey/white-listing of debtors, etc.

Propel Performance Management

Propel Organization Structure Optimization – This process includes defining designation, defining roles and responsibilities, defining job descriptions, creation of reporting structure, Internal job posting process (To be used for promotions, where applicable), defining of compensation bands, and more.

Propel Human Resource Policies – Various relevant HR policies will be drafted as per the organization's requirement. Some of these include but are not limited to attendance, leave, new joining procedure, overtime, working hours, phone and internet rules, hygiene, food and travel reimbursements, performance management methods, rules and regulations etc. We will also help develop the review/audit mechanism to ensure the HR polices are serving the organizations need in a periodic manner.

Propel Recruitment Process Creation and Interviewing Skills Training – Propel Recruitment process creation and interviewing skills training will include Defining MSR required for recruitment, creating interview evaluation format, creating test scoring sheet, training on how to conduct interviews, etc.

Propel Onboarding Process – The onboarding process is what sets the newly employed personnel on the right note. The onboarding process includes aspects like document collection and storage, administration checklist, job-role training, process, and skill training required to perform their job-role well, post-training evaluation, accreditation during probation, accreditation evaluation, and lots more.

Propel Performance Scorecards – This process comprises: defining key result areas and key performance indicators (KPIs), setting targets for each KPI, creating performance scorecards, defining performance review mechanism, creating performance improvement planning process, defining warning processes, etc.

Our Approach:

- We will deploy a Certified Propel Consultant (CPC), who will be available for visits & online meetings as per the need of the activity.
- All processes as per scope will be evaluated, designed, and handed over in maximum 6 - 8 months from the start of the project.
- Implementation support will be provided in the following 4 - 6 months, to maximum 4 days in a month.
- The overall project timeline will be 12 months.

Commercials:

Retainer fee starting @ INR 80,000/Mo + GST

Effex Resources on Project:

1 Certified Propel Consultant
1 Principal Consultant

Please Note:

- Any additional support required (post maximum 4 days in a month) will be charged per day.
- The commercials include the cost of automation on MS-Excel/Google Spreadsheet only.
- All software automation will be quoted for separately as and when required.
- Travel and accommodation will be charged at actuals for all outside-of-Mumbai interventions.

Schedule a call with us to get a custom proposal

Scan the QR Code and Pick a date and time convenient to you.

Connect with us over email or phone

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