

Document ID: OAK-BD-PR



Business Development Process

Version 2.5

23-Jan-14

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Abstract: This document describes the Business development process to be followed by the Business Development group at OAKSYS

CHANGE HISTORY

Version	Release Date	Authors	Review team	Description
1.0a		Ben	Pradeep, Pai Balasubraman ya, Asmita	Refer below line
Draft				
1.0	15-Jul-03	Ben	Pradeep, Pai Bala, Swati, Asmita, Santosh, Ben, Manik	Refer below line
Sec 4.0, 5.2.1,				
1.1a				Refer below line
Section 9.0 Form PIF is changed(CR2,CR13,CR17)				
1.1	29-Aug-03	Ramesh	Asmita	Refer below line
Latest version				
1.2	06-Sept-03	Pradeep	Vivek	Refer below line
Sec 9.0 Appendix Contract review checklist is added(CR27), CRS doc id corrected(CR55)				
1.3	08-Sept-03	Asmita	Pradeep	Refer below line
Change in sec. 5.3 to define basis of allocating members to project (CR 71)				
1.4	03-Jan-04	Asmita	Pradeep	Refer below line
As per CR 48 and CR 98, the customer response sheet and customer feedback form templates are changed .				
1.5	15-Sep-04	Pradeep	N Pai	Refer below line
Since new Sourcing Project Management Process is being introduced, related changes into this process are incorporated. This version incorporates change requests CR				
1.6	13-Apr-05	Prashant S.O	Shashidhar Joshi	Refer below line
As per CR151 Address, Phone number & email-ID is changed in the first page of the process. Similarly OAK-BD-FR-PPR template is changed (new version 1.1).				
1.7	30-Nov-05	Prashant S.O	Asmita	Refer below line
As per CR 245 Customer response sheet is modified. As per CR 211 sec 5.1.2 point 4 is updated. As per CR 243 sec 5.1.2 point 4 is updated. As per CR 248 OAK-BD-FR-RDB template is updated. As per CR 220 new templates are (OAK-BD-FR-RRF), (OAK-BD-FR-CRCF) added into the BD process.				
1.8	15-Jun-06	Asmita		Refer below line

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As per CR 135,235, 272 appraisals are added in HRT process , therefore customer feedback section 5.6 in BD process is also updated. As per CR 253 project plan id from appendix is removed. As per CR 264 duplicacy of CRC, RRF, RDB is elaborated. As per CR 231,237 review of PO, tender is elaborated. As per CR 262 phone umber of organization has been changed. As per CR 250 Status column is updated in CRS template				
1.9	11-Jan-07	Pradeep		Refer below line
CR 293 & 314 – To incorporate new template ‘Customer Complaint Sheet’ into the QMS. Refer it in sections 5.6 and also list it under section 9.0				
2.0	23-Jul-07	Asmita	Pai	Refer below line
As per CR 334 to incorporate RDB of new customers in weekly BD meeting sec 5.1.2 bullet As per CR-297 getting customer feedback is more elaborated in sec. 5.6				
2.1	10-02-09	Asmita	Pai	Refer below line
As per CR 379 Section 5.6 is rewored to include RCA.OAK-BD-FR-CCS is updated with Root cause Analysis and Corrective action.				
2.2	10-Aug-09	Asmita	Pai	Refer below line
As per CR 386 : ISO 9001:2008 referred CR 388: Address change both in this document and in OAK-BD-FR-PPR document (new version 1.2) CR 385: BD process improved after review – sections 5.1.1 & 5.2.1				
2.3	09-Aug-10	Asmita	Pai	Refer below line
As per CR 393 Upgraded OAK-BD-FR-CDB template (ver 1.1) for certain key background information about the potential customer such as the market segment, process maturity, history of outsourcing, presence of other vendors (potential competition), known contacts and future growth plans. To the extent possible, strengths and weaknesses of the potential customer and the competition that is in the picture be collected. As per CR 350 and 352 feedback frequency in sec 5.6 is updated to collect first feedback within 1 month of start of assignment of the team member.				
2.3.1	01-Aug-11	Vinoth	N Pai	Refer below line
CR 406 : Address change both in this document and in OAK-BD-FR-PPR document (new version 1.2.1)				
2.4	20-Aug-12	Pradeep	N Pai	Refer below line
CR 409 : Inclusion of Business Plan : These sections are updated - section 3.0, 5.1 (new), 6.0, 7.0, 9.13 (new) CR 414: Inclusion of creation of Business Units – section 5.2.4(new) added.				
2.5	23/01/14	Pradeep	Pai	Refer below line
CR 444: Update Contract review Checklist (OAK-BD-CL-CRV) for confirming statutory compliance & forms submission to client, if any. No change in this document.				

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1.0 BUSINESS DEVELOPMENT PROCESS

1.1 Purpose

To establish and maintain procedures for review of enquiries (both for sourcing and Turnkey projects) and contracts / orders accepted to ensure:

- ≡ That the Customer requirements / specifications are adequately understood.
- ≡ That the company can meet the Customer requirements / specifications in terms of quality, cost, and schedule.
- ≡ That any ambiguities in the Customer requirements / specifications are resolved prior to acceptance / execution of the order.
- ≡ That all customer feedback is recorded and appropriate actions are taken

1.2 Scope

This process shall be applicable to all the enquiries for which the company plans to offer a proposal / quotation and all the confirmed orders / contracts which need to be executed by the company as well as all amendments to confirmed orders / contracts.

1.3 Target Audience

Head Business Development, Head Operations and Delivery, Business Development Executives, Head Quality, HR.

1.4 Glossary

BD--Business Development
 BDE – Business Development Executive
 HBD – Head Business Development
 HO & D – Head of Operations & Delivery
 HR- Human Resource
 Oaksys - Oak Systems Pvt Ltd
 RFP- Request for proposal.

1.5 References

- ≡ Quality Management Systems - Requirements ISO 9001:2008
- ≡ HR & Training Process – OAK-HRT-PR
- ≡ Project Management Process - OAK-PM-PR
- ≡ Sourcing Project Management Process - OAK-SPM-PR

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2.0 ENTRY CRITERIA

- ≡ The entry for this process is the point at which a customer is identified as a potential prospect and is added to the list of the Prospective Clients.

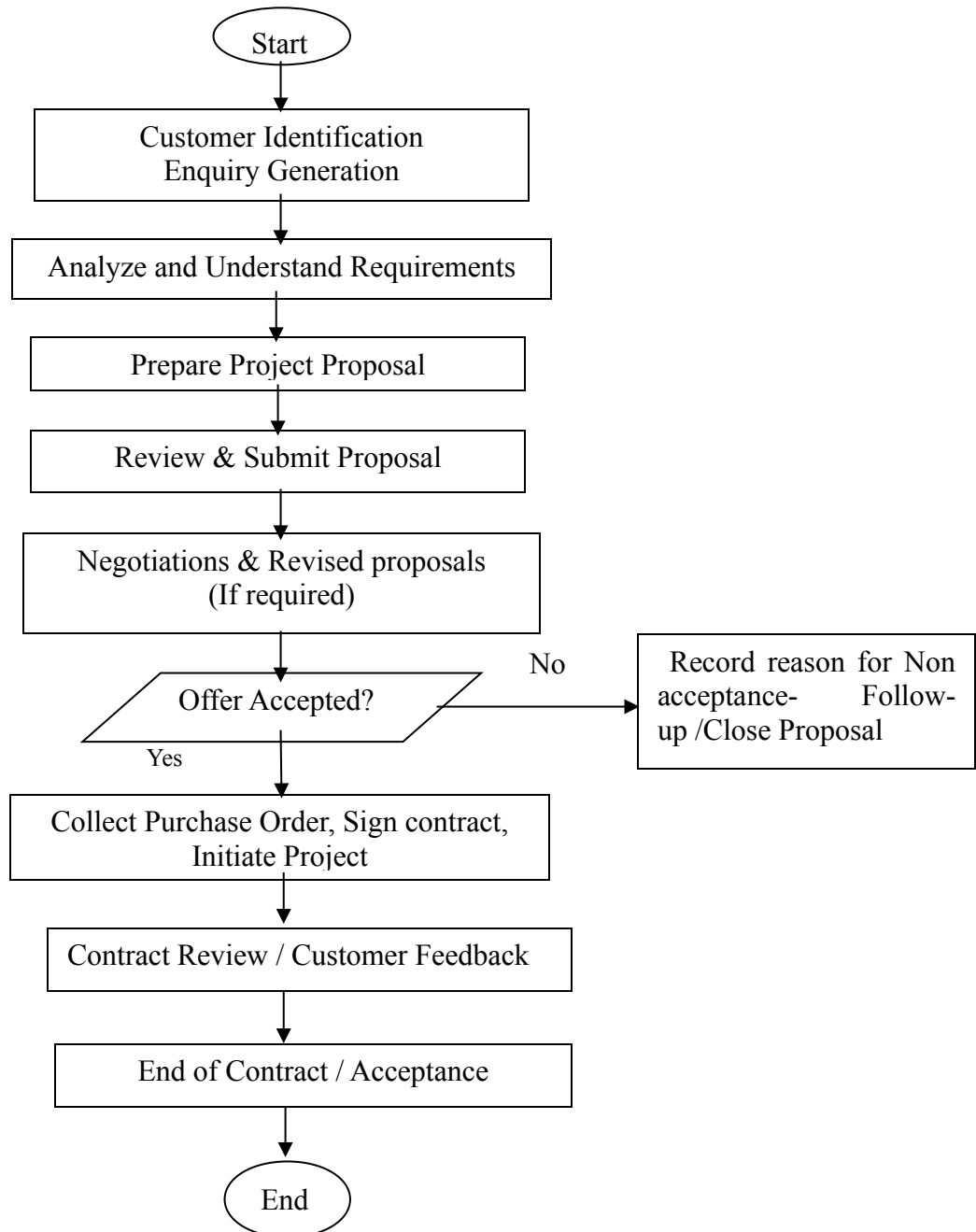
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3.0 RESPONSIBILITY

The Business Development Group under the guidance of its HBD shall be responsible for the Business Development Functions.

- ≡ Head Business development: Reviews and approves Business Plans; Reviews Request for proposal & contracts
- ≡ Head Operations and Delivery: Supports Head Business Development in proposal preparation.
- ≡ Business Development Group: Initiates RFP, Prepares Project Proposal, Submits Proposals, Negotiates Contracts, follows-up/communicates with existing customers on an ongoing basis. Prepares Business Plan.

4.0 PROCESS FLOW DIAGRAM



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5.0 PROCESS DESCRIPTION

5.1 Business Planning

Business development group shall plan the business activities for the company in line with the directions set forth by the company. The business plan shall be the basis for all the business activities of Oaksys. The business plan shall contain the following information at the minimum.

- ^ Current market situation
- ^ Targets/Goals for the ensuing period
- ^ Action plan for achieving goals
- ^ Indicative Resource requirements (hardware/software/manpower/funds)
- ^ Risks & possible mitigation plan

Business Plan Template [**OAK-BD-FR-BP**] can be used for this purpose. The business plan can be reviewed and updated from time to time depending upon the changing market scenario and company's focus.

5.2 Customer Identification and Enquiry Generation

5.2.1 Market Segments

1. Oaksys has broadly classified its target market segments into three categories, viz.:
 - ≡ Software Development Corporates
 - ≡ Government Organizations involved in Software Development
 - ≡ Corporates with IT Service Requirements
2. The business development group maintains the list of organisations in these market segments. [**Client List Database (format: OAK-BD-FR-CDB)**].
3. Based on the information available from the database, the business development group shall locate and contact the potential customer either through phone / mail or in person.
4. The business development group may collect certain key background information about the potential customer such as the market segment, process maturity, history of outsourcing, presence of other vendors (potential competition), known contacts and future growth plans. To the extent possible, strengths and weaknesses of the potential customer and the competition that is in the picture be collected and analysed.
5. With the inputs from the background information, the Business Development group shall highlight Oaksys capabilities to the potential customer. Company brochures and other marketing material can be used for this purpose.
6. During the interaction with the potential customer, the Business Development group shall explore the possibility of Business with the customer for mainly following two models, viz.:
 - ≡ Sourcing projects.
 - ≡ Turnkey Projects.
 Any other model can also be explored depending upon business potential.

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5.2.2 Receipt of Enquiries

1. The BD group will initiate contact with the prospective customer and generate enquiries. The enquiries of the customer can either be for a specific requirement or for a generic set of requirements with long-term sourcing engagement model.
2. The Business Development Group shall receive the inquiries from the existing or prospective customer.
3. At the outset all enquiries that do not pertain to the company's field of work may be regretted / ignored.
4. The enquiry from the customer may be received for two types of contract, viz.:
 - ≡ Sourcing Projects – Sourcing projects are carried out at customer premises with the customer managing the project
 - ≡ Turnkey Projects - Turnkey projects could be done onsite at customer location or done at Oaksys premises or a combination thereof.
5. The enquiries that are relevant shall be updated and maintained in the [Requirements DB](#) (format: **OAK-BD-FR-RDB**) by the Business Development Group. If any further clarification is required for the requirement the requirement can be captured into Customer requirement collection form (OAK-BD-FR-CRCF), by the BDE and then it can be sent to customer. The manpower resource requirements shall be given to HR using Recruitment Request Form (OAK-BD-FR-RRF) or part of RDB. In cases where the requirement is part of an existing sourcing project contract, it will be captured in PTS need not be in the RDB. The requirements are recorded and handled as per the **Sourcing Project Management Process** (OAK-SPM-PR) The Business Development group shall carry out the weekly reviews of the customer enquiries and requirements from new customer shall be discussed in weekly BD group meeting. The requirements captured in RDB shall be used for such reviews and discussions. the **Weekly Report** (OAK-PM-FR-WR) can be presented to the Director. The Director will review the status of uncompleted actions planned in the previous meeting, the status of active customers and prospective customers. The Director shall whenever required guide the Business Development Group for further actions to be taken

5.2.3 Customer Visits

1. The Business Development Group shall be responsible to co-ordinate any visits by customer/s or potential customer/s. Intimation regarding the purpose of the visit, duration etc shall be intimated to the concerned people via email/in person.
2. The feedback received from the customer and the action planned, based on the feedback, shall also be recorded in the **Client List database OAK-BD-FR-CDB**.

5.2.4 Business Units

In order to provide better delivery focus and to attract customers, Oaksys may identify certain domains/areas and group them under multiple business units. The business development and operations & delivery groups shall align their activities, responsibilities and members to map into these business units. Each business unit can have a BU head and can have exclusively assigned members.

Currently, the following business units are identified.

- a. **Banking Business Unit (BBU)**: Covers all the activities for the banking domain

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b. Embedded Business Unit (ESBU):Covers all the activities under various domains such as Avionics, Automotive, Networking, Telecom, Space, Medical Electronics etc.

c. Others: All the activities and initiatives that do not fall under either BBU or ESBU will continue to be handled by the BD group.

5.3 Proposal

1. The information necessary for preparing the proposal document for the proposed project is obtained by BD Group with support from HO&D through discussions, study of documents etc. This ensures that Customer requirements are correctly understood by Oaksys.
2. Once Oaksys is convinced that the Customer requirements with regard to the quantum of work, quality and quantity needs of software, delivery schedules and such other aspects can be met, a **Project Proposal** (OAK-BD-FR-PPF) shall be prepared. In certain cases, if the customer specifies a different proposal format, that format shall be used.
3. The Business Development group with support from HO&D shall prepare the [Project Proposal](#). The [Project Proposal](#) or tenders shall be reviewed by walkthrough process and shall be approved by the Director .
4. During the negotiation phase the Business Development Group shall clarify all the issues raised by the customer. Business development group obtains inputs from HO&D when considered necessary. It is possible that the requirements themselves might undergo revision leading to changes in the proposal.

5.3.1 Signing of Contract

Once the Customer is satisfied with the company's proposal, a sign off from the authorized signatory shall be obtained on the proposal. The customer shall optionally raise a formal purchase order or sign an MOU or an agreement.

In case the contract is **not** awarded to the company, the business development group shall try to collect and analyse the root causes for the same after collecting the related information from various sources. This analysis shall be recorded in Requirements DB. The possible solutions to win similar contract in future can also be recorded by BDE.

5.3.2 Review of the order received

1. The Business Development Group shall receive the Purchase Order from the Customer. Business development group shall review the Purchase Order by Walkthrough process and shall resolve any issues with the customer.
2. Any differences shall be immediately brought to the notice of the Director for Resolution. The acceptance of the order / contract shall be communicated with the customer by mail / letter.

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5.4 Project Initiation

5.4.1 Turnkey projects

Once the project has been accepted, BD Group shall communicate to the HO&D to initiate the project. The **Project Initiation Form (OAK-BD-FR-PIF)** shall be used for this purpose. The HO&D shall assign the Project ID, Project Leader and Team Members required to execute the project. PL and Team Members shall be identified using the **Availability List**. The Project Leader and Team Members working on the project may change / increase / decrease during the execution of the project.

Project leader is responsible for preparing the project plan as per the **Project Management Process (OAK-PM-PR)**.

5.4.2 Sourcing Projects

Once the project has been accepted, HBD shall initiate the project. The HBD in consultation with HO&D shall assign the Project ID, BDE and Team Members required to execute the project. BDE acts as a project leader for the sourcing projects.

BDE is responsible for preparing the project plan as per the **Sourcing Project Management Process (OAK-SPM-PR)**.

5.5 Contract amendments

All amendments to the agreed contract shall be recorded in the **Contract Review Form (OAK-BD-FR-CRF)** for every contract amendment. Once the amendment is agreed to, the Business Development Group shall issue an amendment to the original contract through this form. The revised specifications and schedules, if any, shall be communicated to the concerned project group for compliance. All amendments to contracts / orders shall be appended to the original contract / order and filed for ready reference.

5.6 Order confirmation

For every order / amendment that has been accepted after review as detailed above, an order confirmation shall be communicated to the Director.

5.7 Customer Feedback & complaints

The Business Development Group with help from PL, shall receive all the Customer Complaints as well as collects customer feedback. The Customer Complaints shall be recorded in the **Customer Complaint Sheet (OAK-BD-FR-CCS)** format. It is important that the customer complaints are addressed with high priority. Depending upon the nature of complaint, its root cause analysis, resolution mechanism and action plan can be defined in discussion with HBD.

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Recommendations for Process enhancements as corrective actions shall be captured in **Customer Complaint Sheet**.

Customer feedback shall be recorded in **the Customer Response Sheet (OAK-BD-FR-CRS)** by the BD group. The feedback can also be collected thru performance reviews of each employee for both Sourcing and Turnkey projects. For a person who is inducted into the project, BD will try to collect the first feedback within 1st month. After that, regular feedback frequency can be followed. The required actions along with the responsibility and target date shall be recorded in the sheet by the Business Development Group. BD group shall convey the appropriate feedback to the customer.

The frequency of receiving customer feedback can be discussed with customer and accordingly it can be mentioned in PTS for Sourcing project or Project Plan for Turnkey project. The feedback can be received for entire team or specific team member if customer agrees to provide on individual basis.

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6.0 DELIVERABLES AND QUALITY RECORDS

- ≡ Client List Database – OAK-BD-FR-CDB
- ≡ Requirements Database – OAK-BD-FR-RDB
- ≡ Project Initiation Form – OAK-BD-FR-PIF
- ≡ Contract Review Form – OAK-BD-FR-CRF
- ≡ Project Proposal – OAK-BD-FR-PPR
- ≡ OAKSYS Resume – OAK-BD-FR-OR
- ≡ Weekly Report – OAK-PM-FR-WR
- ≡ Customer Response Sheet – OAK-BD-FR-CRS
- ≡ Customer requirement collection form (OAK-BD-FR-CRCF)
- ≡ Recruitment Request Form (OAK-BD-FR-RRF)
- ≡ Business Plan (OAK-BD-FR-BP)

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7.0 VERIFICATION

7.1 Head-Business Development

- ≡ Review of Business Plan alongwith H O&D
- ≡ Review of Request for Proposal
- ≡ Review of Proposal for Project with the HO&D
- ≡ Review of Contract and minutes of requirements review meeting

7.2 Head Operations and Delivery

- ≡ Review of Business Plan alongwith H O&D
- ≡ Review and analyse the Requirements
- ≡ Review proposal along with HBD

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8.0 EXIT CRITERIA

≡ As this is an ongoing process, there are no exit criteria.

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9.0 APPENDIX

9.1 Client List Database – OAK-BD-FR-CDB

9.2 Project Initiation Form – OAK-BD-FR-PIF

9.3 Contract Review Form – OAK-BD-FR-CRF

9.4 Requirements Database – OAK-BD-FR-RDB

9.5 Project Proposal – OAK-BD-FR-PPR

9.6 OAKSYS Resume – OAK-BD-FR-OR

9.7 Weekly Report – OAK-PM-FR-WR

9.8 Customer Response Sheet – OAK- BD-FR-CRS

9.9 Contract Review Checklist - OAK-BD-CL-CRV

9.10 Recruitment Request Form – OAK-BD-FR-RRF

9.11 Customer Requirement Collection Form – OAK-BD-FR-CRCF

9.12 Customer Complaint Sheet – OAK- BD-FR-CCS
Business Plan
Template – OAK- BD-FR-BP