

opsdog

WORKFLOW

SALES

Cash Management Sales

EPIM 2.0 FORMAT

The OpsDog General Line Hierarchy

- Customer Service
- Call Centers
- Product Development
- Collections

Sales

- Sales Support
- Telemarketing (Inside Sales)
- Field Sales (Outside Sales)**
 - Cash Management Sales**
- Sales Performance Management
- Commissions & Incentives

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Cash Management Sales : Workflow

- A** Proposal & Account Development
- B** Quality Control & Implementation

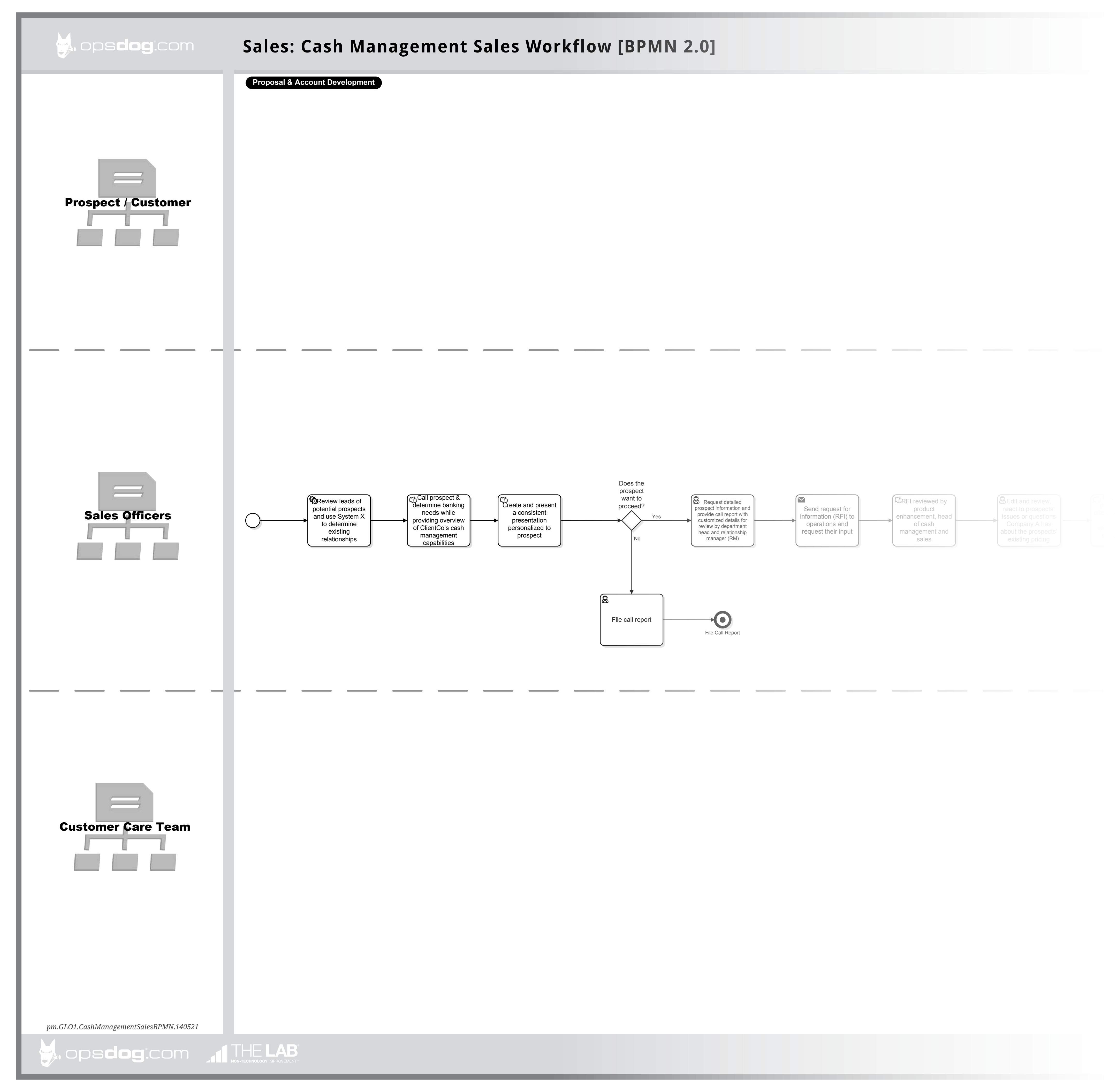
Workflow Description

The sale of cash management services to individual customers. Includes client requirements gathering, information collection, proposal generation, account opening and customer education.

Legend

- Start Event
- Intermediate Event
- End Event
- Gateway
- Group
- Task
- Expanded Sub-Process
- Pool
- Sequence Flow
- Message Flow

DO-IT-YOURSELF BUSINESS PROCESS IMPROVEMENT



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