# Scope of Work – Current

- client-base is made up of Corporates, Institutions, Private Investors, Family Offices
- Sourced from captive contacts , social media, targeted media campaigns, walk ins, startup ecosystems
- Operated on a fragmented basis
  - Email
  - LinkedIn
  - Telephonic
  - Personal Meetings
  - Social Media
- Currently managed through Excel based tracking , Manual follow up and up-dations
- Time consuming , Effortful, Tracking is a challenge
- Lacking a system to manage relationships
- Information traceability not optimized
- Client profiling is effortful

Scope of Work - Proposed
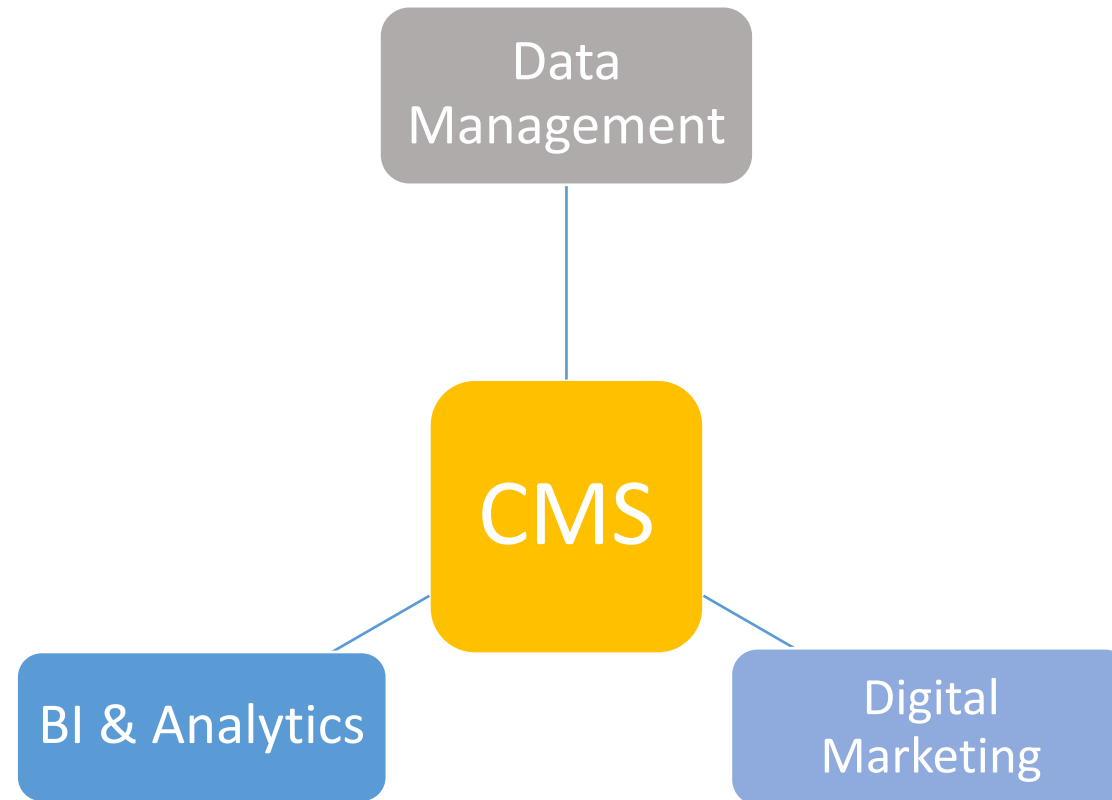
Scope of Work – Proposed

- Client Management System (CMS) features

      Robust | Scaleable | Secure | Automated |Tracking | Profiling

- Import data automatically from LinkedIn , Email, Social Media

- Data sorting & cleanup

- Synchronization of LinkedI In & Email to the CMS

- Create profiling pattern fields to be defined in consultation with CGA

- Support Social Media based Client Campaigns , Content Calendar

- Cliet System to provide Bulk mail / sms / LinkedIn / other social media campaigns support

- Data Transferability from external sources to spreadsheet or other systems and importing vice versa

- Analytics support to reflect Behavior pattern , Success Rate Ratio and further modifiable as per CGA instructions

- Further eventuality of building a AI / ML scaled model to enable "Behavior" Pattern Profiling using Analytics

- Business Intelligence support

- Digital Marketing support for supporting client with campaigns

- Embedded Control Systems

- Cyber Secure layer with 2FA protocol to ensure safety of data

- GDPRS support

Next steps

- SOW confirmation / modification or good to go
- Tech Team interview
- Pricing & Time Line Estimation
- Proposal firm up
- Contract Sign up
- Remote team assignment
- Execution with Timelined Review
- Final testing
- Implementation
- Support & Maintenance