



CROSS-SELLING



What is Cross-Selling ?

Scenario	Details	Is it a Cross-Selling?	Type of Cross-Selling Referral
Cross Country	MY business developer gets a SG BS opportunity from an event and refers it to SG	Y	Cross Country
	CN CS service manager gets a HK CS opportunity from a Chinese law firm and refers it to HK	Y	Cross Country
	HK BS service manager contacts a HK existing client to explore further business opportunity and then refers a JP CS opportunity to JP	Y	Cross Country
	JP business developer identifies a business opportunity involving JP, SG and HK from a Japanese law firm and reach out to SG and HK	Y	A multiple-country opportunity is considered as a cross-country cross-selling opportunity.
Within the same country	HK CS service manager contacts a HK existing client to explore further business opportunity and then refers a HK BS opportunity to BS	Y	In Country Cross Service Line
	JP accounting service team (BS) refers a JP payroll opportunity to JP payroll service team (BS)	N	Not a cross-selling. This is a In-Country Same Service Line referral
	SG CS service manager gets a referral from Big 4 accounting firm, which involves both CS and BS opportunities in SG at the same time . SG CS service manager refers to BS	N	Not a cross-selling. This is a multiple-service opportunity with SG CS directly benefiting from this opportunity

A Sample Scenario

- **Brenda Lee (BS)** from **Tricolor HK** contacted her existing client **David Tam (HK HR Manager)** of **Sony HK** and would like to explore more cross-country cross selling opportunities from Sony. Following the discussion, **Brenda** identified the payroll service opportunity in MY.
- David connected Brenda to his counterpart **Melisa Ong (HR Manager)** in **Sony MY**
- **Brenda** submitted the referral via the Cross-Selling Form and **Celine See** is the deal owner who receiving the email.

1
Source of Referral



David Tam
Sony Hong Kong
Source of Referral

2
Submit Cross-Selling Form (Tricorridor)



Brenda Lee
Tricolor HK
Referrer

3
Follow Up and Update the Deal (HubSpot)



Celine See
Tricolor Malaysia
Deal Owner

4
Prospective Client



Melisa Ong
Sony Malaysia
Prospective Client

01

How to Fill in Cross-Selling Form (Referrer)

Where to submit a cross-selling form?
What do you need to fill in?

02

Deal Owner in the Receiving Country

Who is responsible for updating the status of a cross-selling deal in HubSpot in each receiving country?

03

How to Update Cross-Selling Deals in HubSpot (Deal Owner)

How can you update a cross-selling deal in HubSpot for better tracking?

04

Cross-Selling Deals Reporting

How you can export the list of cross-selling deals and what information is included?

05

Resources

What are the services are being offered in other countries?

1

Source of Referral



David Tam
Sony Hong Kong
Source of Referral

2

Submit Cross-Selling
Form (**Tricorridor**)



Brenda lee
Tricor Hong Kong
Referrer

3

Follow Up and Update
the Deal (**HubSpot**)



Celine See
Tricor Malaysia
Deal Owner

4

Prospective Client



Melisa Ong
Sony Malaysia
Prospective Client

Tricor Cross-Selling Form



- With VPN, go to <https://tricorridor.tricorglobal.com/cross-selling-referral/>
- Without VPN, go to <https://www.tricorglobal.com/cross-selling-referral>

Global Homepage

The Global Homepage features a top navigation bar with links for Home, About Us, Investor Relations, and Careers. The main content area includes a 'Project Minerva announces tricor Applan' banner, followed by 'Announcements & Updates' with several news items. A 'Referral' link is prominently displayed in a red box. Below this are sections for 'Corporate Video' and 'Follow Us'.

HK Homepage

The HK Homepage features a top navigation bar with links for Home, About Us, Investor Relations, and Careers. The main content area includes a 'Tricor Young Talent Award Summer Internship Program 2019' banner, followed by 'Announcements & Updates' with several news items. An 'Events' link is prominently displayed in a red box. Below this are sections for 'Corporate Video' and 'Follow Us'.

Cross-Selling Referral

The Cross-Selling Referral page features a header with the 'CROSS-SELLING' logo and a banner image of people holding hands. Below this is an 'About Cross-Selling' section with a brief description. The main part of the page is the 'Cross-Selling Form', which includes fields for 'Your Information as a Referrer' (Name, Email, Phone, etc.), 'Your Information as a Recipient' (Name, Email, etc.), and a 'Source of Referral Information' dropdown menu. There are also checkboxes for 'I am a Tricor employee' and 'I am a former Tricor employee'. The form ends with a 'Submit' button.

Definition of Each Data Field: Your Information

Data Field	Definition	Data Type	Compulsory (Y/N)	How to Fill in the form based on the Sample given in Slide 4
Your Information	This section is about the person who submits the referral			
Your Name	Full Name of Tricolor Staff	Free Text	Y	Brenda Lee
Your Work Email	Your Tricolor/work email	Email	Y	Brenda.lee@hk.tricorglobal.com
Your Location	Which Tricolor Office/Location you are working at	Dropdown Selection	Y	Hong Kong
Service Line	Which Tricolor Service Line you are working for	Dropdown Selection	Y	Business Services
Single or Multi-Country Referral	Single country or more than one countries will be involved in the referral	Dropdown Selection	Y	Single Country
Single or Multi-Service Lines	Single or multi-service lines will be involved in the referral	Dropdown Selection	Y	Single Service Line
Type of Referral	<ul style="list-style-type: none"> • Cross Country: the opportunity is referred from one country to another. E.g. HK -> SG, SG -> MY, JP- > CN • In Country Cross Service Line: the opportunity is referred to the different service line in <u>the same country where you come from</u> • In Country Same Service Line: the opportunity is referred to the same service line in the <u>same country where you come from</u> 	Dropdown Selection	Y	Cross Country

Definition of Each Data Field: Source of Referral Information

Data Field	Definition	Data Type	Compulsory (Y/N)	How to Fill in the form based on the Sample given in Slide 4
Source of Referral Information	This section is about how and where you get the referral. For example, you may get a referral from your existing client or law firm. You need to key in their information here.			
How did you get the referral?	This indicates from what channel you get the referral.	Dropdown <ul style="list-style-type: none"> Existing Clients External Referral (Law firm, Financial Institution, Accounting Firm etc) Event Others 	Y	Existing Clients
Source of Referral – Company Name	The name of referrer company	Free text	Y	Sony Hong Kong
Source of Referral – Referrer Contact Name	The name of the person who gives you the referral	Free text	Y	David Tam
Source of Referral - Referrer Contact Email	The email address of the person who gives you the referral	Email	Y	david.tam@sony.com
Source of Referral – Referrer Job Title	The job title of the person who gives you the referral	Free text	Y	HK HR Manager

Definition of Each Data Field: Prospective Client Details

Data Field	Definition	Data Type	Compulsory (Y/N)	How to Fill in the form based on the Sample given in Slide 4
Prospective Client Details	This section is about the prospect you are going to refer. In order for the deal owner in the receiving country to have a better understanding about the prospect, please fill in the information.			
Prospective Company Name	The company name of a prospect Or the project name (<i>if a company name is not available</i>)	Free text	Y	Sony MY Ltd.
First Name	The first name of a prospect's contact person	Free text	Y	Melisa
Last Name	The last name of a prospect's contact person	Free text	Y	Ong
Job Title	The job title of a prospect's contact person	Free text	Y	HR Manager
Work Email	The work email of a prospect's contact person	Email	Y	Melisa.ong@sony.com
Office Phone No	The office phone no of a prospect's contact person	Numeric	Y	+6 03-6754 7865
Mobile No	The mobile no of a prospect's contact person	Numeric	N	+6 012 123 456 7865

Definition of Each Data Field: Prospective Client Details

Data Field	Definition	Data Type	Compulsory (Y/N)	How to fill in the form based on the Sample given in Slide 4
Time Frame	How soon a prospect would like to kick start the project	Dropdown selection	Y	3 months
Service Required (refer to slide 11 to 14)	Which service a prospect is interested in	Multiple check boxes	Y	Business Service
Require Service from	In which country a prospect would like to engage Tricolor	Multiple check boxes	Y	Malaysia
Other Referral Details	Any other information to help the deal owner in the receiving county to understand better about the referral.	Free text	N	Sony MY is exploring to change service provider due to the poor service delivery of the existing service provider. They have about 1,000 employees now. Sony MY has asked for a con call to discuss about the requirements further.

No.	New/Existing	Value	Description
1	New	Consulting & Advisory - Tax Advisory (non-Axcelasia)	-
2	Existing (Renamed)	Consulting & Advisory - GRC Services (non-Axcelasia)*	-
3	New	Consulting & Advisory - KYC Services	-
4	New	Digital Product - Boardfolio	-
5	New	Digital Product - Docusign	-
6	New	Digital Product - Remote Participation (RPV)	-
7	New	Digital Product - E-Services	-
8	New	Digital Product - SPOT	-
9	New	Digital Product - Client Digital Portal	-

*Renamed from “GRC Services”

No.	New/Existing	Value	Description
10	Existing	HR & Payroll Services	Payroll only
11	New	HR & Payroll Services - PEO	-
12	New	HR & Payroll Services - HRM/RRS	-
13	New	HR & Payroll Services - Payslip/Unify	-
14	New	HR & Payroll Services - Payroll Health Check	-
15	New	HR & Payroll Services - Recruitment	-
16	New	HR & Payroll Services - Consulting	-
17	New	HR & Payroll Services - Others	-
18	Existing	Fund Administration	-
19	Existing	Business Services	Inclusive of Accounting, Tax Compliance, Treasury & Payment, Others BS services

No.	New/Existing	Value	Description
20	Existing	Corporate Services	CS annual compliance services
21	Existing (Renamed)	Corporate Services – Trust*	-
22	New	Corporate Services - Offshore/BVI	-
23	New	Corporate Services - ODI	-
24	Existing	Axcelasia - Business Consulting	-
25	Existing	Axcelasia - EMS (Softnex)	-
26	Existing	Axcelasia - Tax Advisory	-
27	Existing	Insurance & Wealth Solutions	-
28	Existing	Investor Services	-

*Renamed from “Trust Services”

No.	New/Existing	Value	Description
29	Existing	Madison Pacific (Corporate Secretarial & Directorship)	-
30	Existing	Madison Pacific (Escrow & Custodial)	-
31	Existing	Madison Pacific (Trustee & Agency)	-
32	Existing	Orisoft - BPO	-
33	Existing	Orisoft - License	-
34	Existing	Orisoft - SaaS	-
35	Existing	Orisoft - Service	-
36	Existing	Other Services	-

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Pre-defined Deal Owner in Receiving Countries (to-be-continued)



Service Line/Location	Consulting & Advisory - GRC (BS)	Consulting & Advisory - KYC (Accelasia)	Consulting & Advisory - Tax (Accelasia)	HR & Payroll Services (Payroll)	HR & Payroll Services - FEO (HRM)	HR & Payroll Services - HRM/HRIS (Payroll/Unity)	HR & Payroll Services - Health Check (HR & Payroll)	HR & Payroll Services - Recruitment (HR & Payroll)	HR & Payroll Services - Consulting (HR & Payroll)	HR & Payroll Services - Others (HR & Payroll)	Digital Product - Client Digital Portal	Digital Product - Discussion Board	Digital Product - Portfolio (Digital Product)	Digital Product - Remote Participation (RPV) (Digital Product)	Digital Product - E-Services (Digital Product)	Digital Product - PCT (Digital Product)	Corporate Services - Corporate (Corporate Services)	Corporate Services - Offshore/BVI (Corporate Services)	Corporate Services - Trust (Corporate Services)	Corporate Services - ODI (Corporate Services)	Insurance & Wealth Solutions (Insurance & Wealth Solutions)	Madison Pacific (Corporate Secretarial & Directorship) (Madison Pacific)	Madison Pacific (Escrow & Custodial) (Madison Pacific)	Madison Pacific (Trustee Agency) (Madison Pacific)	Orisoft - BPO (Orisoft)	Orisoft - License (Orisoft)	Orisoft - SaaS (Orisoft)	Orisoft - Service (Orisoft)	Orisoft - New Product (Orisoft)	Business Consulting (Business Consulting)	Accelasia - EMS (Softline) (Accelasia)	Accelasia - Tax Advisory (Accelasia)	Fund Administration (Fund Administration)																						
Multi-Countries	Eva Loong										Karen Cheung					Aggie Jiang	NA	NA	Gillian Chan			Ferry Lugito/Elaine Chu				Arnieza Azam	Leonard Yap	Ray Page																											
United States	Michael Fisher																			NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA					
Australia	Kee Kee Wang / Carolyn Warren																			NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA		
China	Christine Wang																			NA	Aggie Jiang	Aggie Jiang	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	Christine Wang			
Hong Kong/Macau	HKITTCCommercial@hk.tricorglobal.com cc HKMarketingCommunicationDepartment@hk.tricorglobal.com																			NA	NA	HKITTCCommercial@hk.tricorglobal.com cc HKMarketingCommunicationDepartment@hk.tricorglobal.com	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	Ray Page
Indonesia	Sukiman Muljana			NA	NA	Sukiman Muljana					NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	Ferry Lugito/Elaine Chu				NA	NA	NA	NA	NA	NA																				
India	Vinay Sancheti			NA	NA	Vinay Sancheti					NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA																	
Japan	Tricolor Japan																			NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA				
Malaysia/Labuan	Celine See																			NA	NA	Celine See	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA				

Pre-defined Deal Owner in Receiving Countries (to-be-continued)



Service Line (Location)	Consulting & Advisory - GRC Services (non-BS)	Consulting & Advisory - KYC Services (Axcelasia)	Consulting & Advisory - Tax Services (Axcelasia)	HR & Payroll Services - Payroll (PEO)	HR & Payroll Services - HRM/HRIS	HR & Payroll Services - Payroll/Unify	HR & Payroll Services - Health Check	HR & Payroll Services - Recruitment	HR & Payroll Services - Consulting	HR & Payroll Services - Others	Digital Product - Client Portal	Digital Product - Discussion Board	Digital Product - Portfolio	Digital Product - Remote Participation (RPV)	Digital Product - E-Services	Digital Product - SPOT	Corporate Services - Corporate	Corporate Services - Offshore/BVI	Corporate Services - Trust	Corporate Services - DDI	Insurance & Wealth Solutions	IS	Madison Pacific (Corporate Secretarial & Directorship)	Madison Pacific (Escrow & Custodial)	Madison Pacific (Trustee & Agency)	Orisoft - BPO	Orisoft - License	Orisoft - SaaS	Orisoft - Service	Orisoft - New Product	Axcelasia - Business Consulting	Axcelasia - EMS (Softnrx)	Axcelasia - Tax Advisory	Fund Administration																			
Singapore	Suan Kit Foo & info@sg.tricorglobal.com																		Michael Shue	N/A	N/A	Suan Kit Foo	Gillian Chan			Ferry Lugito/Elaine Chu				Arnieza Azam		Leonard Yap	Ray Page																				
Taipei	Sue Lin	N/A	N/A	Sue Lin				N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	Sue Lin	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A																
Thailand	Supha Wiriyathamkul/ Tippanuch Jenpanyarat																		N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A		
Vietnam	Brian Nguyen																		N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	
Korea	Tricolor Korea																		N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Barbados	Tricolor Barbados	N/A	N/A	Tricolor Barbados				N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A														
Brunei	Tricolor Brunei	N/A	N/A	Tricolor Brunei				N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A														
British Virgin Islands	Tricolor BVI	N/A	N/A	Tricolor BVI				N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A														
Cayman Islands	Tricolor Cayman	N/A	N/A	Tricolor Cayman				N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	Ray Page														
Ireland	Tricolor Ireland	N/A	N/A	Tricolor Irelands				N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A														
United Kingdom	Tricolor UK	N/A	N/A	Tricolor UK				N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	Ray Page														

The Recipients of General Email Addresses



Country	Service Line	Email Address	List of Recipients
Hong Kong	All	HKITTCCommercial@hk.tricorglobal.com & HKMarketingCommunicationDepartment@hk.tricorglobal.com	<ul style="list-style-type: none"> • HK Commercial & HK Marketing Team
Japan	All	info@jp.tricorglobal.com	<ul style="list-style-type: none"> • Scott Sato / Kevin Smythe / Susumu Iwatsuki / Chuong Luu / Seisuke Shimizu / Sho-Yamauchi / Karmen Ong
Singapore	All	info@sg.tricorglobal.com	<ul style="list-style-type: none"> • Ho Lon Gee / Kitty
Korea	All	info@kr.tricorglobal.com	<ul style="list-style-type: none"> • Kum-Teck Han
Barbados	All	info@bb.tricorglobal.com	<ul style="list-style-type: none"> • Connie Smith
Brunei	All	info@bn.tricorglobal.com	<ul style="list-style-type: none"> • Cecilia Wong
British Virgin Islands	All	info@bvi.tricorglobal.com	<ul style="list-style-type: none"> • Clair Burke / Angel Fung
Cayman Islands	All	info@ky.tricorglobal.com	<ul style="list-style-type: none"> • Wendy Kam / Winnie Yuen / Andy Ma / Ella Wong
Ireland	All	info@ie.tricorglobal.com	<ul style="list-style-type: none"> • Gerry McNally / Kieran Obrien
United Kingdom	All	info@uk.tricorglobal.com	<ul style="list-style-type: none"> • Danila Valaythen (Tricor UK) / Dilen Valaythen (Tricor UK) / Heena Bhandari (Tricor UK) / Jin Liu (Tricor UK) / Monica Peters (Tricor UK) / Richard Tozer (Tricor UK) / Stephen Martin (Tricor UK)

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Tricor Hong Kong
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3
Follow Up and Update the Deal **(HubSpot)**



Celine See
Tricor Malaysia
Deal Owner

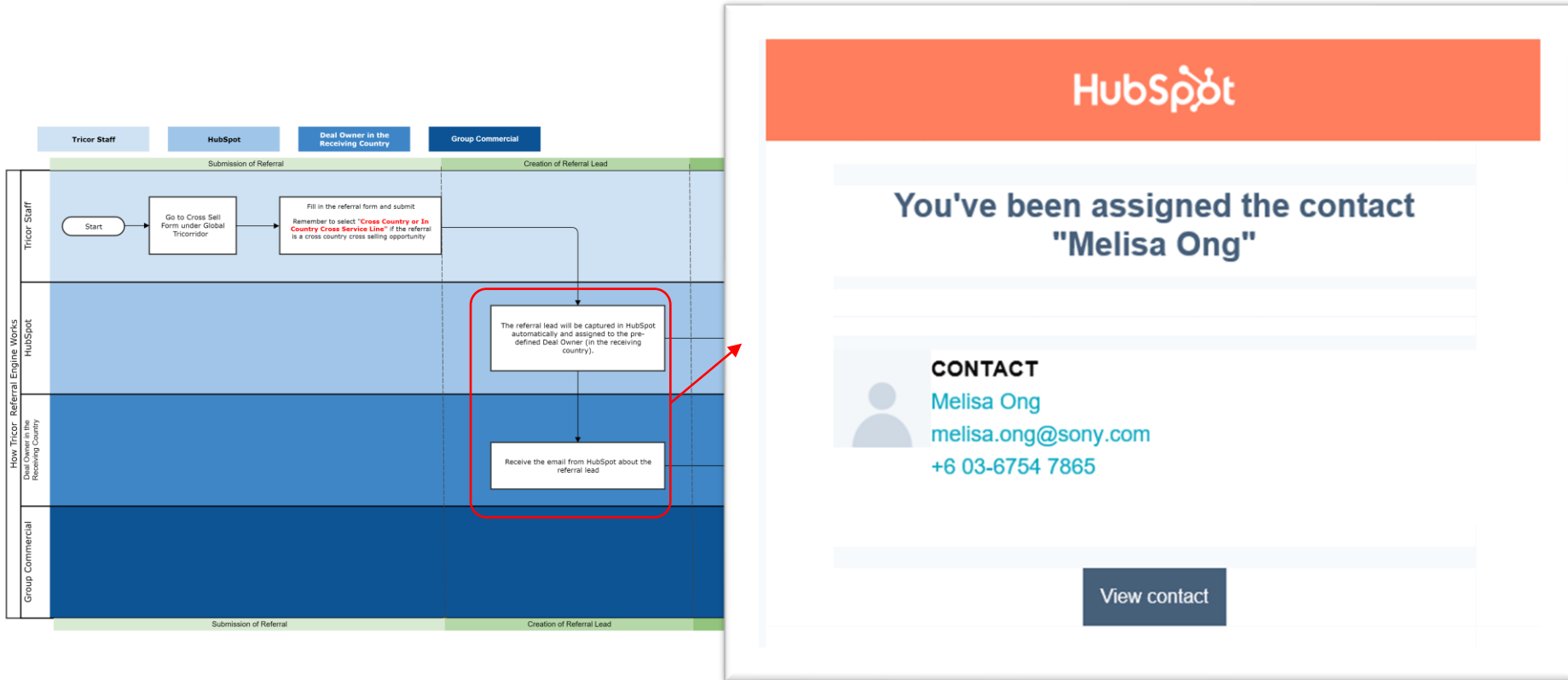
4
Prospective Client



Melisa Ong
Sony Malaysia
Prospective Client

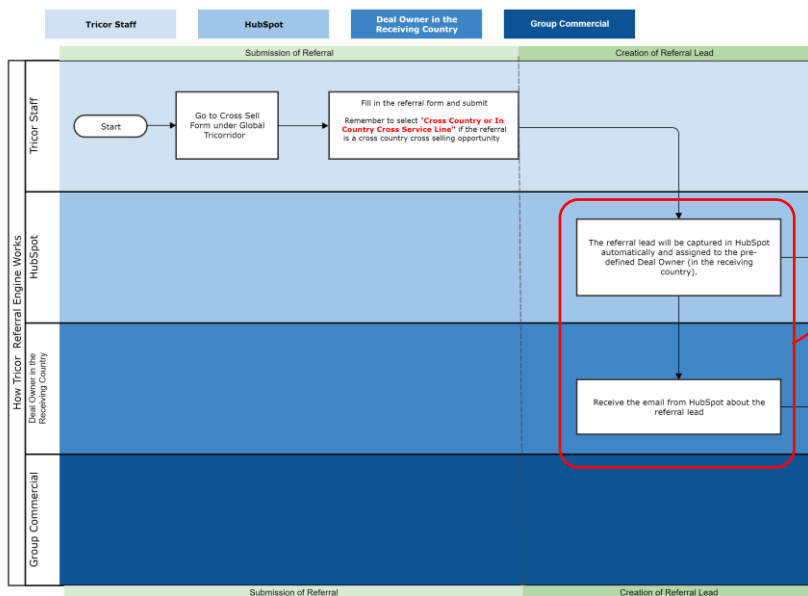
Email Sample about Cross-Selling Lead from HubSpot

- An notification from HubSpot will be sent to the deal owner about the referral lead.



Additional Email Notification Sample about Cross-Selling Lead from HubSpot

- An automated email notification with more details (summarising the submission details) from HubSpot will also be sent to the deal owner about the referral lead.



You have a referral from the website.

Referrer's Information:

Referring Employee: CONTACT.REFERRING_EMPLOYEE_NAME
 Referring Employee's Email: CONTACT.REFERRING_EMPLOYEE_EMAIL
 Referring Employee's Location:
 Referring Employee's Department: CONTACT.REFERRER_DEPARTMENT
 Single or Multi-Country Referral: CONTACT.GROUP_DEAL
 Single or Multi-Service Line: CONTACT.SINGLE_OR_MULTI_SERVICES
 Type of Internal Referral: CONTACT.TYPE_OF_INTERNAL_REFERRAL

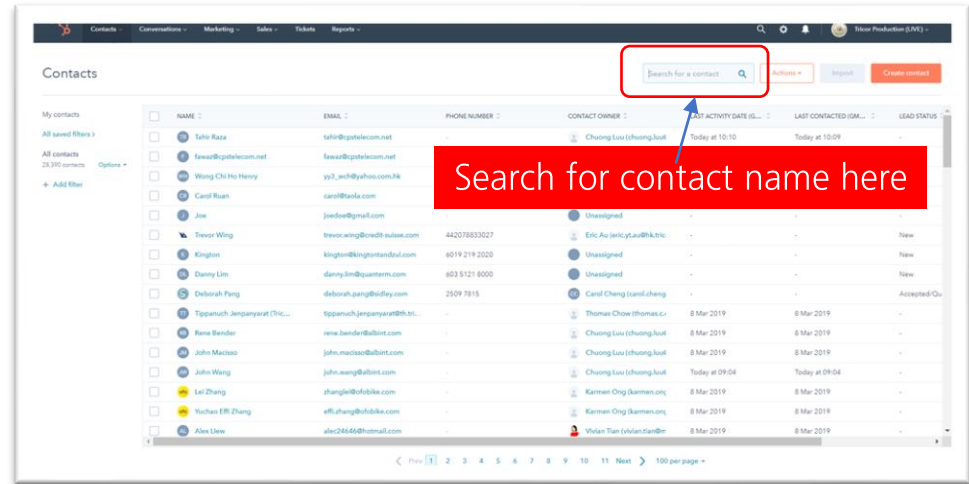
Source of Referral

How did you get the referral: CONTACT.LEAD_SOURCE
 Please specify: CONTACT.PLEASE_SPECIFY
 Source of Referral - Company Name: CONTACT.REFERRER_COMPANY
 Source of Referral - Contact Name: CONTACT.REFERRER_NAME
 Referrer Contact Email: CONTACT.REFERRER_EMAIL
 Referrer Job Title: CONTACT.REFERRER_JOB_TITLE

Business Being Referred:

Company Name: CONTACT.COMPANY
 First Name:
 Last Name: CONTACT.LASTNAME
 Job Title: CONTACT.JOBTITLE
 Work Email: CONTACT.EMAIL
 Phone:
 Mobile No:
 Estimated Project Kick off Duration:
 CONTACT.ESTIMATED_PROJECT_KICK_OFF_DURATION
 Service Required: CONTACT.SERVICES_INTERESTED_IN
 Country Engaged: CONTACT.COUNTRY_OFFICE_INTERESTED_IN
 Other Referral Details:

- 2 different ways to view the referral lead details page:
 1. Click on “View Contact” in the email (Slide 21)
 2. Log in to HubSpot > Contacts > Search box > Search for the contact



- The Cross Sell referral details will be shown in the Contact Timeline Activities as shown in the screen capture. It shows:

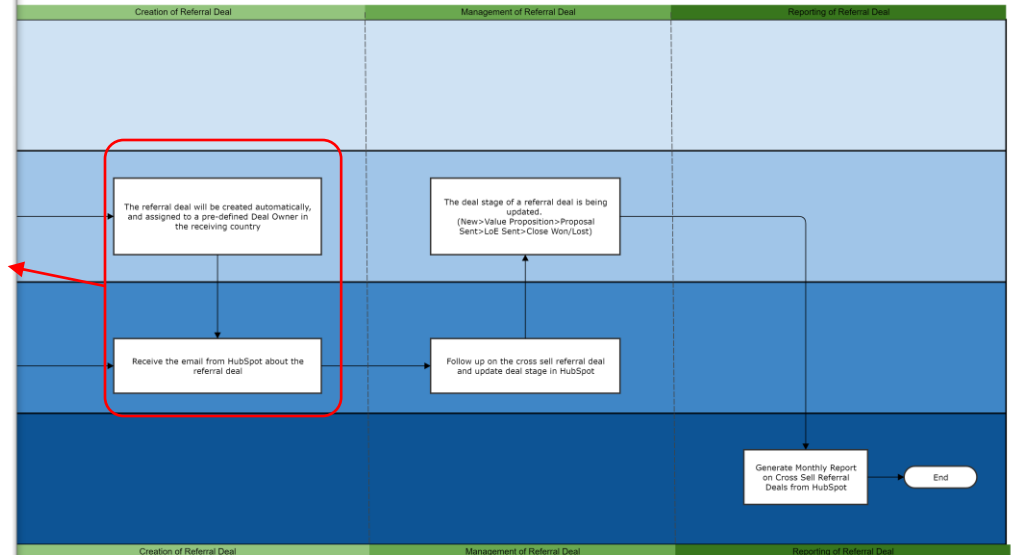
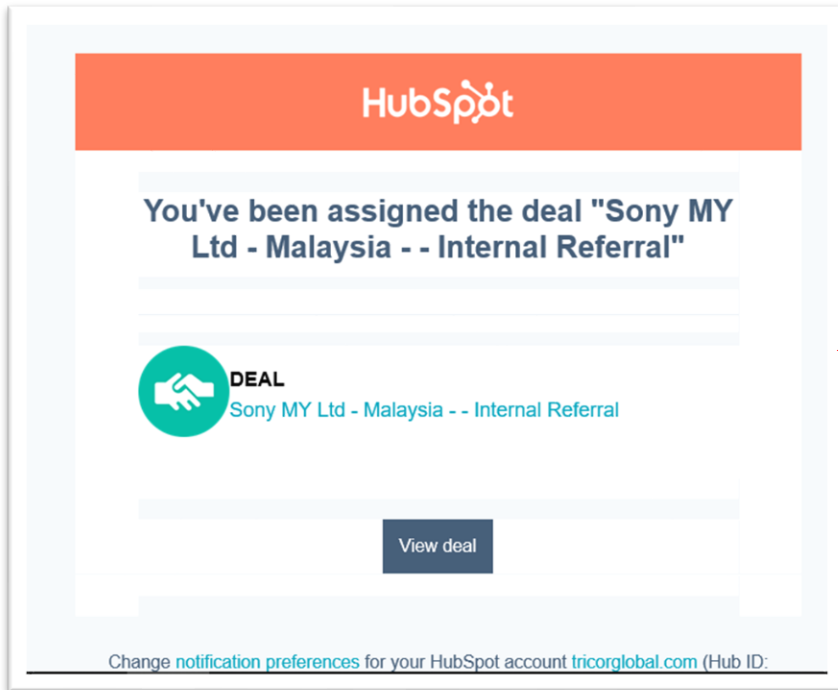
- Company name (of a prospective client)
- Email address
- Job Title
- Mobile phone number etc

The screenshot displays the HubSpot contact profile for Melisa Ong, HR Manager at Sony. The contact information includes her name, job title, company name (Sony MY Ltd), and first name (Melisa). The activities timeline for November 2019 shows a 'Form submission' activity on Nov 8, 2019 at 9:37 AM GMT+8. The activity details indicate that Melisa Ong submitted an 'Internal Referral Form for Incentive Program on Tricolor Incentive Program'. A red box highlights this activity, and a red text box above it states 'Referral details will appear in the activities timeline'. Below the activity title, a dropdown menu shows 'Updated 23 properties', with a table displaying the following details:

Company Name	Sony MY Ltd
Country/Office Interested In	Malaysia
Create Date	Nov 8, 2019 9:37 AM
Email	melisa.ong@sony.com

Email Sample about Cross-Selling Deal from HubSpot

- HubSpot workflow will be triggered to automatically create a referral deal based on the information provided via the referral form
- The Pre-defined Deal Owner in receiving country will receive an email from HubSpot about the referral deal (as per the screen capture show here)

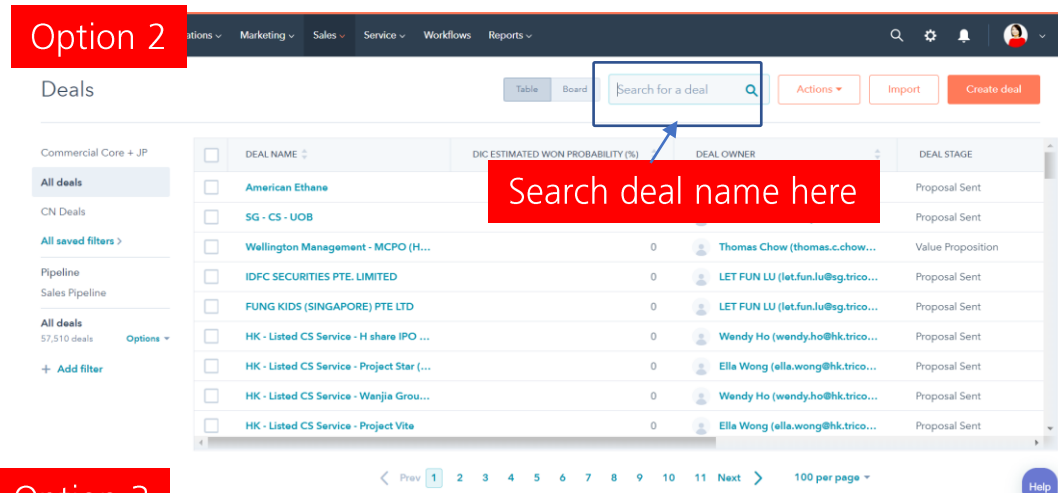


Search Cross-Selling Referral Deals in HubSpot

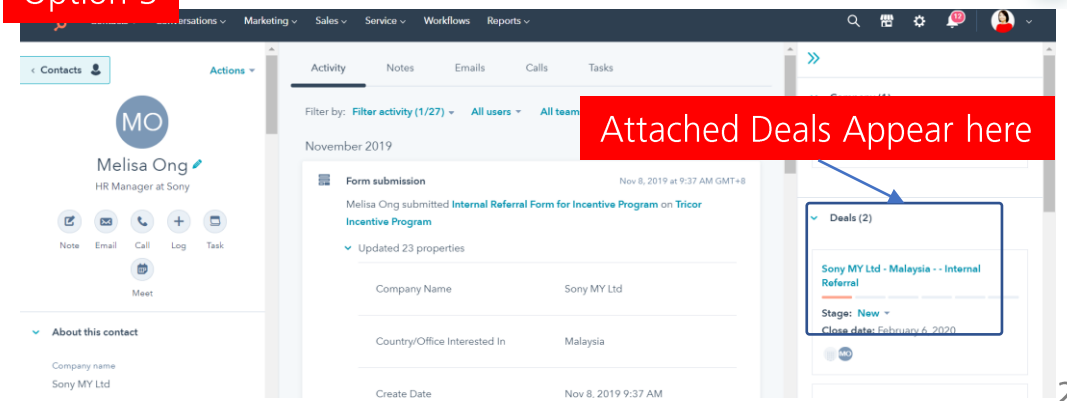
- 3 different ways to view the cross sell deal details page:

1. You can click on the “View Deal” in the email (refer to slide 25)
2. Log in to HubSpot > Sales > Deals > Search box to search for the
3. Log in HubSpot > Contacts > Search box to find the Contact > Attached Deal

Option 2

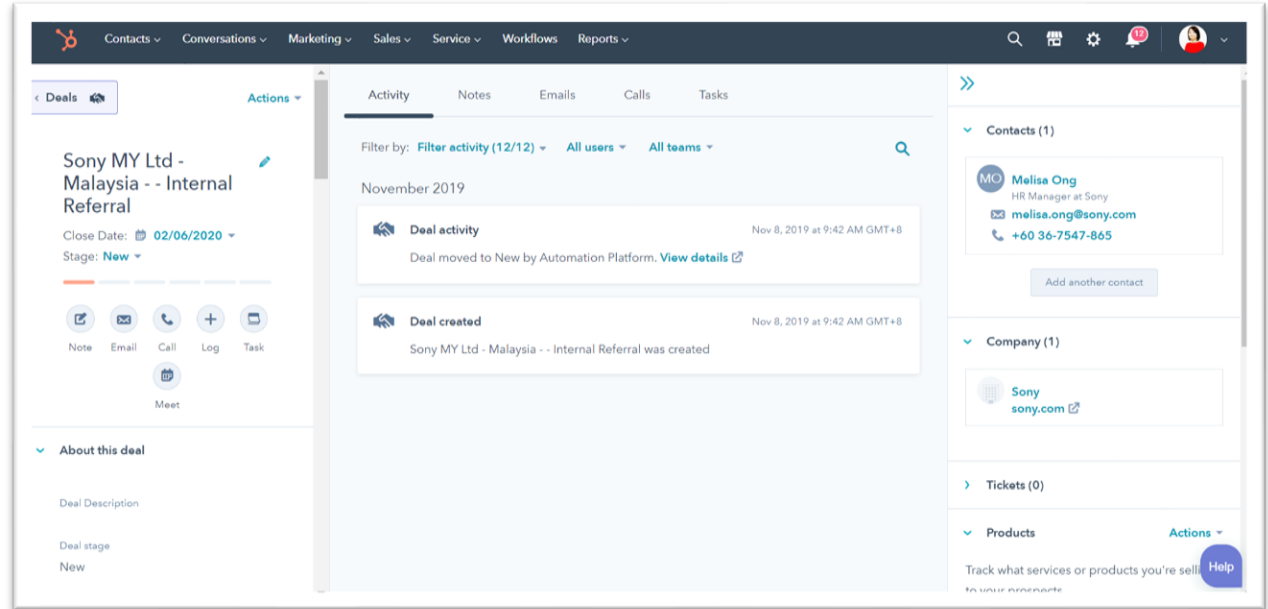


Option 3



View Cross-Selling Referral Deal Details in HubSpot

- On the deal details page, it shows:
 - Deal Name
 - Deal Amount
 - Deal Stage
 - Tricolor Office Engaged
 - Tricolor Service Engaged etc
- Please click [here](#) to understand more about how to update a deal.



Definition of Data Field in Deals (Actions Needed from Deal Owners)

Data Field	Definition	Data Type	Compulsory (Y/N)	Responsibility
Deal Stage	Identify, Active Pursuit, Finalist, Closed Won (Selected), Closed Won (Service Commenced), Closed Lost* (refer to the slide 32)	Dropdown	Y	HubSpot workflow will use “New” as the starting point. Deal Owner in the receiving country should update deals stages accordingly based on the deal development
Amount	The total amount (sum of Recurring Amount + One Off Amount + Retainer Fee) in HK\$	Numeric	Y	Deal Owner in the receiving country should update the amount
Recurring Amount	Estimated first 12-month recurring amount in HK\$	Numeric	Y	Deal Owner in the receiving country should update the amount
One Off Amount	One time amount in HK\$	Numeric	Y	Deal Owner in the receiving country should update the amount
Close Date	An estimated date for us to close this deal	Calendar Picker	Y	Deal Owner in the receiving country should update the close date
Estimated Commencement Date	An estimated date when a project will be kicked off	Calendar Picker	Y (Active Pursuit)	Deal Owner in the receiving country should update the commencement date
Service Director-in-Charge	Director-in-Charge from implementation team	Free text	Y (Active Pursuit)	When a deal is being updated to Proposal Sent stage, this field is compulsory
Service Manager-in-Charge	Manager-in-Charge from implementation team	Free text	N	When a deal is being updated to Proposal Sent stage, this field is compulsory

Definition of Data Field in Deals

Data Field	Definition	Data Type	Compulsory (Y/N)	Remarks
Deal Name	The proposed name convention is: Client Name - Detailed Service Type - Office. For example: Lazada Group - Payroll - HK	Single line text	Y	Created by the HubSpot workflow <u>automatically</u> . All referral deals will automatically include “Cross Sell” in the deal name.
Pipeline	Default value: sales pipeline	Dropdown	Y	Populated by HubSpot workflow <u>automatically</u>
Retainer Fee	Retainer Fee in HK\$	Numeric	N	For HK Only
Local Currency	This is the currency which is used in Proposal/SOW/invoices: AUD / BBD / BND / CNY / EUR / GBP / INR / IDR / JPY / KYD / KRW / MYR / SGD / THB / TWD / USD / VND	Numeric	N	This allows user from the local offices to select the currency they use in the proposal/SOW/Invoice. If it is multiple country & services with multiple currencies deal, this is not required.
Amount In Local Currency	The total amount (sum of Recurring Amount + One Off Amount + Retainer Fee) in local currency	Numeric	N	
Recurring Amount in Local Currency	Estimated annual recurring amount in local currency	Numeric	N	
One Off Amount in Local Currency	One time fee in local currency	Numeric	N	
Retainer Fee in Local Currency	Retainer fee in local currency	Numeric	N	
Billing Frequency	How often we bill the client? Monthly, Quarterly etc?	Dropdown Selection	N	

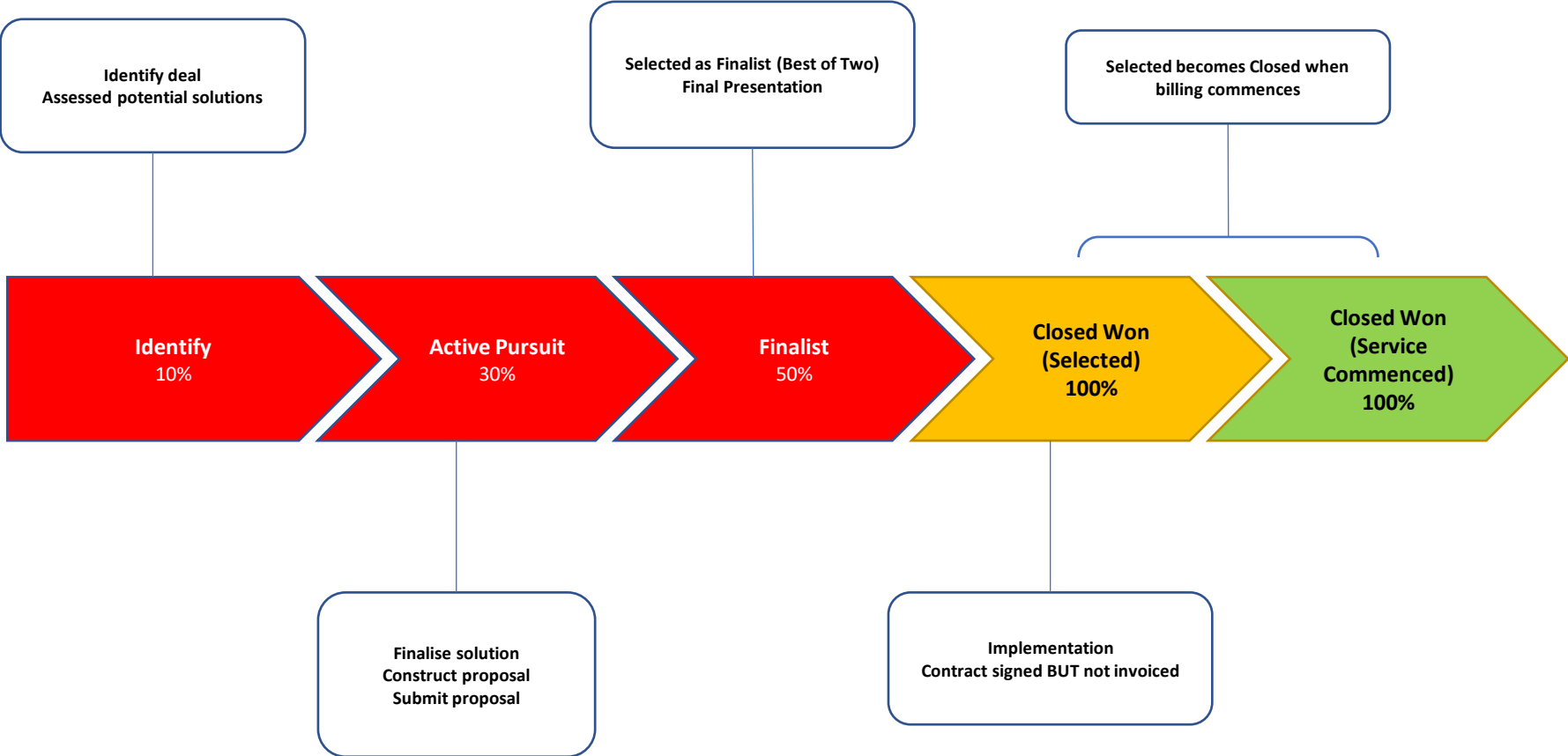
Definition of Data Field in Deals

Data Field	Definition	Data Type	Compulsory (Y/N)	Remarks
DiC Estimated Won Probability (%)	The won probability (%) estimated by Director-in-Charge who is in charge of the case	Numeric	N	
Deal Type	It indicates the type of deals, such as cross sell, new contract etc	Dropdown Selection	Y	HubSpot workflow <u>automatically</u> select "Cross Sell" as deal type. No further amendment is needed from Deal Owner.
Referrer name	It indicates the name of Tricor Staff who submits the referral	Free text	Y	HubSpot workflow <u>automatically</u> populate the information according to the referral form – Your Name. For example: Jessica Lim
Referrer Location	It indicates the Tricor office of referrer	Free text	Y	HubSpot workflow <u>automatically</u> populate the information according to the referral form – Your Location. For example: Singapore
Referrer Service Line	It indicates the service line of referrer	Free text	Y	HubSpot workflow <u>automatically</u> populate the information according to the referral form – Service Line. For example: Business Services

Definition of Data Field in Deals

Data Field	Definition	Data Type	Compulsory (Y/N)	Remarks
Contract Term	For how long a contract is valid.	Dropdown selection	N	
Office/Country Engaged	It indicates where a prospect is interested in engaging Tricor	Dropdown Selection	Y	HubSpot workflow <u>automatically</u> populate the information according to the referral form – Require Service From. For Example: Malaysia
Service Engaged	It indicates which Tricor service line a prospect is interested in engaging.	Dropdown Selection	Y	HubSpot workflow <u>automatically</u> populate the information according to the referral form – Services Interested in. For example: Business Services
Deal Owner	Deal Owner in receiving country	Dropdown selection	Y	HubSpot workflow <u>automatically</u> assign the deal owner according to the slide 11 and 12. For example: Celine See
Type of Referral	<ul style="list-style-type: none"> • Cross Country: the opportunity is referred from one country to another. E.g. HK -> SG, SG -> MY, JP- > CN • In Country Cross Service Line: the opportunity is referred to the different service line in <u>the same country where you come from</u> • In Country Same Service Line: the opportunity is referred to the same service line in the <u>same country where you come from</u> 	Dropdown selection	Y	HubSpot workflow <u>automatically</u> populate the information according to the referral form – Type of Internal Referral. For example: Cross Country

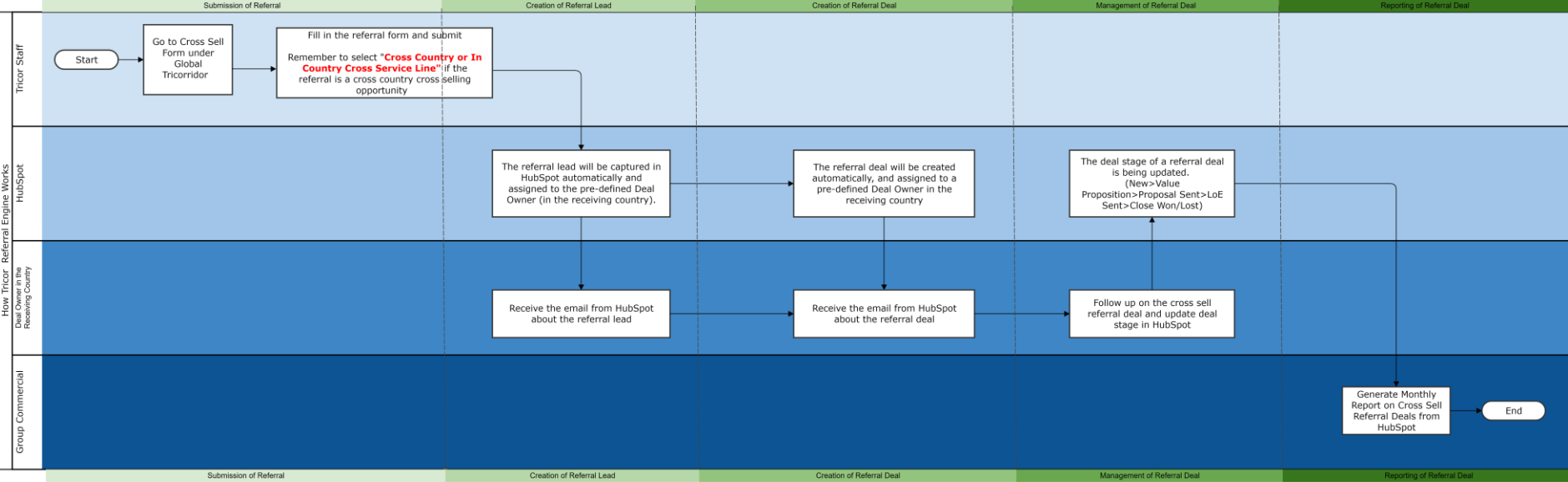
Deal Stages



Overall Cross-Selling Workflow



Tricolor Staff HubSpot Deal Owner in the Receiving Country Group Commercial



01

How to Fill in Cross-Selling Form (Referrer)

Where to submit a cross-selling form?
What do you need to fill in?

02

Deal Owner in the Receiving Country

Who is responsible for updating the
status of a cross-selling deal in
HubSpot in each receiving country?

03

How to Update Cross-Selling Deals in HubSpot (Deal Owner)

How can you update a cross-selling
deal in HubSpot for better tracking?

04

Cross-Selling Deals Reporting

How you can export the list of cross-
selling deals and what information is
included?

05

Resources

What are the services are being
offered in other countries?

Download Cross-Selling Referral Deals

Step 1: Add Filter

Deals

Commercial Core + JP

CN Deals

All deals

All saved filters >

Pipeline

Sales Pipeline

All deals

57,878 deals Options

+ Add filter

Step 2: Search for Deal Name and Type of Internal Referral

Back

All deals

Showing 57,879 deals

Add filter

deal name X

Most used properties

Deal name

All properties

Deal information

Deal name

Step 3: Type "Internal Referral" In deal Name and "Cross Country" and "In Country: Cross Services Line)

All saved filters >

Pipeline

Sales Pipeline

All deals

Options

Deal name contains exactly internal Referral X

Type of Internal Referral is any of Cross Country

Step 4: Apply Filter. You will see the list of result.

- Click on Options to download the result.
- Click on "Action" > "Edit Columns" to add more data fields in the table

Click Options to export

Sample of Cross Sell Deal Report

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
	Deal ID	Deal Name	Referring Employee Name	Referring Employee Location	Referring Employee Service Line	Deal owner	Deal Stage	Office/Country Engaged	Service Engaged	Close Date	Amount	One Off Amount	Recurring Amount (Estimated Recurring Annual Revenue)	Type of Referral
1	1151796011	Sony MY Ltd - Malaysia - Business Services - Cross Sell	Jessica Lim	Singapore	Business Services	Celine See	New	Malaysia	Business Services	2020-02-06 23:59	35000	15000	20000	Cross Country
3	1151793391	Sony MY Ltd - Malaysia - Business Services - Cross Sell	Jessica Lim	Singapore	Business Services	Celine See	New	Malaysia	Business Services	2020-02-06 23:59	50000	30000	20000	Cross Country

01

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Resources

What are the services are being
offered in other countries?

1

<https://www.tricorglobal.com/locations/>
(Tricolor Global Homepage > About > Location)

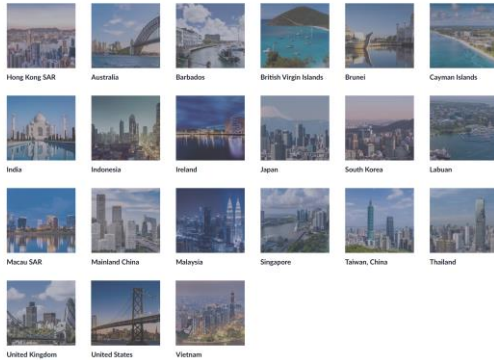


Locations

Connect with us at any of our global offices

Tricolor has made significant progress as a global, industry-leading provider of integrated business, corporate and investor services since our company was founded in 2000. We continue to enhance our capabilities and grow our business. Our global network now covers 47 cities across 21 markets, with a strong presence in 13 of these markets in the Asia Pacific region.

Please select a location to get in contact with one of our local offices:



2

Download Corporate Brochures
(Tricolor Global Homepage > Marketing & Communications
> Select Corporate Brochures in the filter)

Marketing & Communications

Please select a Category: Corporate Brochures

Please select an Office: All

Total 24 records found

Category	Office	Name	Version
Corporate Brochures	Global	Brochure - Business Services	EN Dec 2018
Corporate Brochures	Global	Brochure - Business Services(SC)	SC Dec 2018
Corporate Brochures	Global	Brochure - Corporate Overview	EN
Corporate Brochures	Global	Brochure - Corporate Overview(SC)	SC
Corporate Brochures	Global	Brochure - Corporate Services	EN Dec 2018
Corporate Brochures	Global	Brochure - Corporate Services(SC)	SC Dec 2018
Corporate Brochures	Global	Brochure - Executive Search	EN Dec 2018
Corporate Brochures	Global	Brochure - Human Resources/Payroll Services	EN Dec 2018
Corporate Brochures	Global	Brochure - Human Resources/Payroll Services(SC)	SC Dec 2018
Corporate Brochures	Global	Brochure - Investor Services	EN Dec 2018
Corporate Brochures	Global	Brochure - Investor Services(SC)	SC Dec 2018
Corporate Brochures	Global	ESG/Lauffli - EN	EN Oct 2018
Corporate Brochures	Global	Lauffli - Corporate Overview - EN	EN Mar 2019
Corporate Brochures	Global	Lauffli - Corporate Overview - SC	SC Mar 2019
Corporate Brochures	Global	Lauffli - Equipment/Assetment Ordinance 2017	EN Oct 2018
Corporate Brochures	Global	Lauffli - Rental Brokerage/Lauffli	EN Apr 2018
Corporate Brochures	Global	Lauffli - Tax Services/Lauffli	EN Apr 2018
Corporate Brochures	Global	Lauffli Investor Services	EN Apr 2018
Corporate Brochures	Global	Tricolor - Maldives - Pacific - Flyer	EN Dec 2018
Corporate Brochures	Global	Tricolor - Maldives - Pacific - Flyer (Bahamas)	Bahamas Dec 2018
Corporate Brochures	Global	Tricolor - Maldives - Pacific - Flyer(SC)	SC Dec 2018
Corporate Brochures	Mainland China	Statement of Capabilities in China	EN/SC (Aug 2018)
Corporate Brochures	Labuan	Brochure - Labuan Jurisdictional	EN
Corporate Brochures	Malaysia	Brochure - Introduction of Tricolor Malaysia	EN

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The background of the slide is a photograph of a concrete surface covered with many colorful, 3D block letters in various colors like red, blue, yellow, green, and purple. Some letters are scattered, while others are arranged to spell out "THANK YOU" in two rows. The letters are slightly shadowed, giving them a three-dimensional appearance.

If you have any questions or suggestions regarding the Tricor referral, please feel free to contact Group Commercial Team:

- Marco CS Tam
(marco.cs.tam@hk.tricorglobal.com)
- Chan Wooi Chi
(wooi.chi.chan@my.tricorglobal.com)