

INDUSTRY

Banking & Financial Services

A multinational, global bank providing retail, corporate and commercial banking products, streamlines their sales, service, and marketing processes for 5 different countries, using Salesforce.

Customer Life Cycle Management

Automated customer onboarding and lifecycle management with defined milestones.

Omni channel Complaint Management

Omnichannel customer service with defined SLA and milestones powered by AI driven sentiment analysis

Point to Point Real Time Integrations

Integrations with 37 different system via REST APIs, allowing real time flow of data

Customer Self Service Portal

Contemporary portal powered by BOT, FAQ, Knowledge base and mobile application.

AI Powered Insights

AI backed by predictive data models to provide relevant recommendations and action plan.

Intelligent Reporting

Real time reports and dashboards for the business owners and operations team to keep a check on business health

Personas



- Sales Team
- Service Team
- Marketing Team
- Management Team
- Operations Team
- Data Team
- Vendor Management Team

Products

 sales cloud service cloud marketing cloud einstein

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CHALLENGES

- No view of customer unified data across different business vertical.
- Duplicity of customer accounts and contacts causing manual errors
- Maintaining SLA and response time to manage the enquiries was a challenge
- Very high Turn Around Time for customer complaints hampering customer delight.
- Unorganized and generic marketing campaigns leading to very less churn rate.
- Lack of unified business health dashboard across sales, service and marketing.
- Disintegrated systems leading to operational inefficiencies.

- Unified view of customers across sales and service by creating a customer 360-degree view
- Omnichannel customer service to ensure prompt resolution of the complaints.
- Self-service portal for customer along with contemporary solutions like AI powered BOT, Knowledge articles and FAQ to ensure faster resolution.
- Milestones and Escalation matrices to reduce AHT

- Point to point real time integrations with 37 banking and non-banking systems to ensure seamless transition of data for a unified view of the business.
- Targeted customer cohort-based marketing using Salesforce Marketing cloud.
- Predictive analytics and reporting using Salesforce Einstein features.



SOLUTION



BENEFITS

- Streamlined SPANCO process with higher conversion rate.
- Unified view of customer with all the transactions at one place.
- Efficient customer onboarding process reducing the lead time by 50 percent.
- Reduction in Average handling time and increased customer satisfaction.
- Single source of truth for the teams by virtue of real time integrations.
- Better control over business by virtue of holistic real time reports and dashboards for business owners.
- Real time insights on data and next steps by virtue of Einstein reply recommendations and next best actions.
- Operational efficiencies by virtue of real time and data backed collaboration across the teams