

## CASE STUDY



## INDUSTRY

## Financial Services

An Indian financial services company based in Gurgaon. It allows users to pay bills such as electricity, gas and telephone, as well as recharge mobile, broadband, DTH and metro cards

## Value Creation Modules

**Partner Onboarding Automation**

End to end onboarding of partners using mobile application

**KYC Process**

Automated and simplified KYC process mapped by region and Geo tagged.

**Holistic partner 360 degree**

End to end visibility into partner accounts with transactional data and insights

**Visit Planning & Management**

Logic driven visit plan backed by automated visit reports

**Integrated Systems**

Point to point integration with transactional systems using REST APIs

**Holistic dashboards**

Drillable reports and dashboards to define the key actionable.

## Personas



- Sales Team
- Service Team
- Management Team
- Operations Team
- MIS Team
- Underwriters
- Channel Partners

## Products &amp; Technologies Used



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# Financial Services



### CHALLENGES

- Partner onboarding was a challenge
- The customer failed to integrate the current application with their core system
- No visibility of sales team on the field
- Lots of manual process
- No reporting framework
- TAT for onboarding was very high
- Lot of time was invested by sales team into preparing MIS

- The sales -person goes on the field and onboards new merchant using the built app and follows a automated process with defined validations
- The entire merchant onboarding is automated
- The tracking of sales- person while on field.

- A brand-new lighter application was created as the existing one was not being used by the field team.
- Multiple integration points with the core system to provide ease of use and unified dashboard which was not happening currently.



### SOLUTION



### BENEFITS

- Reduced turnaround time
- Better control over partners
- Better control over sales team
- The time required to fill DRS was reduced by 60 percent.
- The time to onboard a partner was reduced by 30 percent
- Better visibility into performance metrics
- Better control over the sales team
- Validations and controls eradicated the operational errors
- Automated MIS saving Salesperson's time from operational stuffs and providing better visibility into the business.