

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**



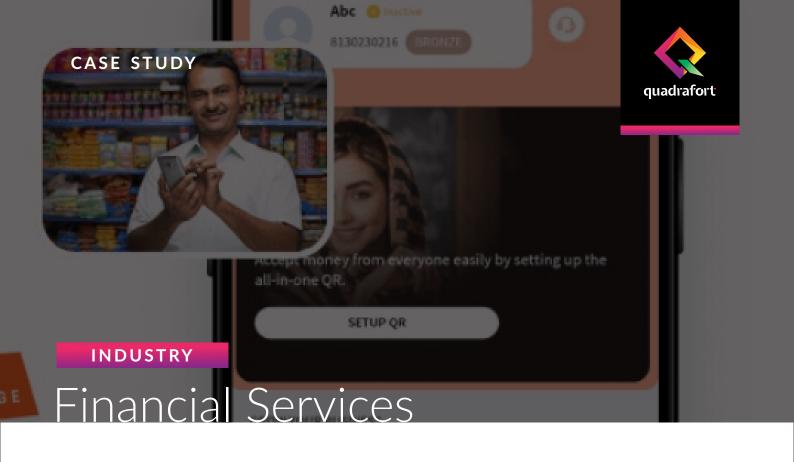
- Sales Team
- Service Team
- Management Team •
- Operations Team
- MIS Team
- Underwriters
  - Channel Partners

# **Products & Technologies Used**











**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
- Multiple integration points with the core system to provide ease of use and unified dashboard which was not happening currently.





- Reduced turnaround time
- Better control over partners
- Better control over sales team
- The time required to fill DRS was reduced by
- The time to onboard a partner was reduced by 30 percent
- Better visibility into performance metrices
- 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.

**BENEFITS** 





