

## NBFC

### Effectively managing customer engagement to create new business

#### Opportunity

A new setup had its opportunities for us w.r.t setting up the customer management process for a leading NBFC in the country. The existing setup had a landline dial-in number. Customer searches took place across multiple Excel spreadsheets. The resolution was tracked using emails, diaries, and Excel; managing emails was a manual process. MIS w.r.t customer queries and responses were missing. Escalations were always waiting to be addressed by senior management.

#### Solution

We mined approximately 50 lakh records to confirm their accuracy. Records from multiple Excel sheets were updated into a database platform. The UI allowed a customer interaction interface for the servicing personnel. Records could be pulled out with a single click through multiple search options. The platform integrated the customer query with the service request through a ticketing system. Remote processing teams could view service requests in real-time. They could not only manage the resolution within TAT, but also bring in the much-needed transparency, velocity, and effectiveness in service. Performance indicators started getting tracked. The workflow supported automated utilities, including but not limited to an NOC generator that reduced the TAT from 7 days to 1 day. After creating, designing, and implementing complaint resolution processes, the process is now fully effective, efficient, and auditable. We have grown from a team of 3 people to 40, turning a cost centre into a profit centre.

#### Key Results



#### Customer Engagement

From zero to >98% first call connect-rate.



#### Analytics

Automated Querying and Service Requests.



#### Profit Centre

Added new business based on cross-selling and upselling.



#### Turnaround Time

>98%

First-call resolution and service request adherence.