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INFOSYS OFFERING FOR WEALTH MANAGEMENT

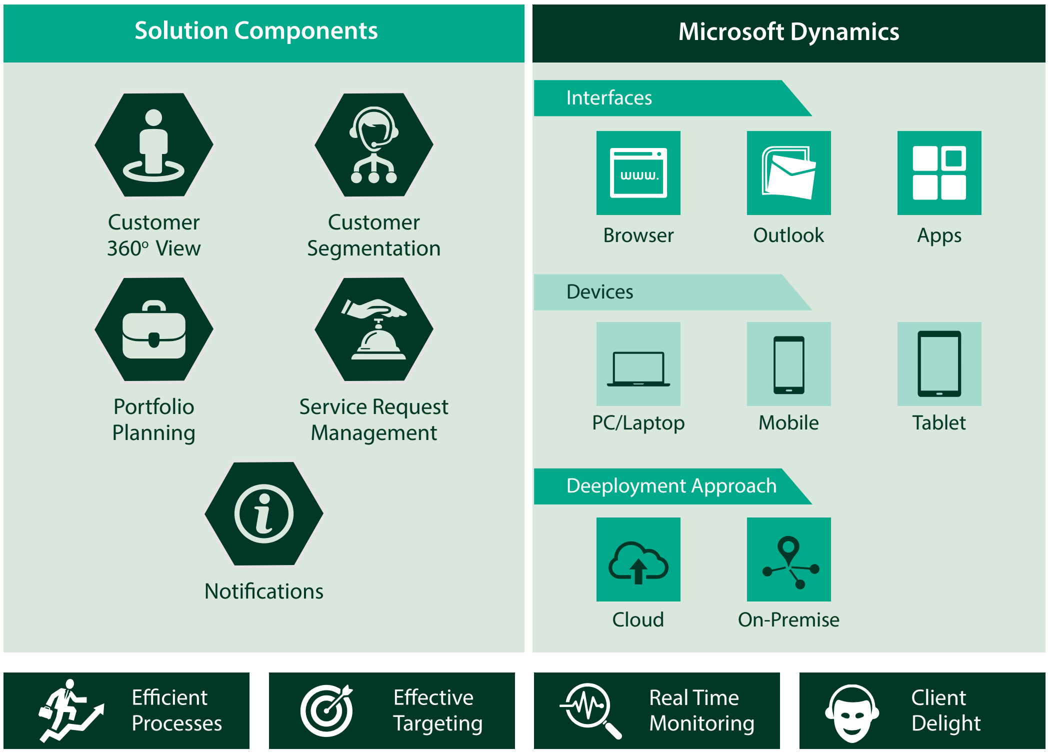
The need of the hour for wealth management companies, is more than just brilliant portfolio management. The cycle of sound investments and better returns, further leading to even better investment, is creating a new class of clients with new-found affluence. To retain these clients, relationship managers need a "Relationship-based approach", as opposed to the traditional "Target-driven approach". Based entirely on developing long-term relationships with the customers through mutual interdependence and cooperation, this approach prescribes greater value for the customer as a means to the advancement of a Customer to a Partner. A key priority in this exercise will be the continuous delivery of high-quality face-to-face advice, while simultaneously providing them with internet-based transactional capabilities. Stronger and multi-channel service options, and a deeper understanding of customer data is going to be the mantra going forward.

Infosys Relationship-Based Solution provides managers with an advanced tool, and a sophisticated technology platform that supports knowledge gathering, analysis, and delivery to ensure long-term relationships with HNI clients.

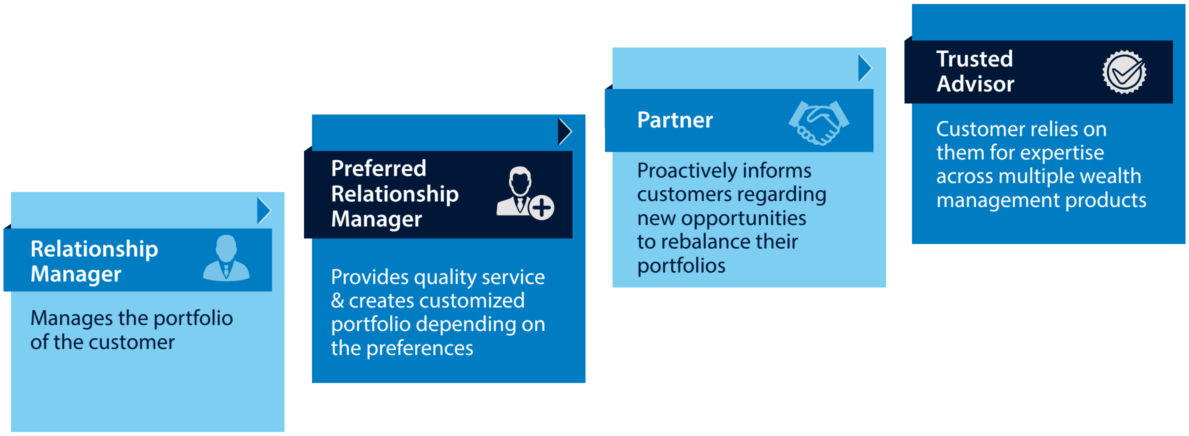
Relationship-Based Solution (RBS)

Infosys Relationship-Based Solution (RBS) is based on Microsoft Dynamics CRM, which offers many niche features for Wealth Management in the BFSI space. Its key offerings include Customer Management, Portfolio Planning, Customer Segmentation, and Service Management, which deliver end-to-end processes ensuring a holistic implementation.

Relationship Based Solution (RBS)



The solution will result in the evolution of the relationship manager into a trusted advisor with the leverage of the solution capabilities for providing quality service to customers. This transition has been depicted in the below diagram.



Solution Offerings

The Relationship-Based Solution delivers business capabilities that enable enterprises to focus on HNI customers as well as ensure high customer satisfaction and better retention of key clients.

The solution's niche offerings/features include:

Customer Segmentation – This feature helps classify customers on the basis of parameters such as Total Income, Portfolio Investment Amount, etc. This will help in faster and focused targeting, and provide specific groups with the best suited customer service.

Customer Management – This feature provides a 360° view of the customer. It not only includes a client profile, covering their personal, professional, and financial information, but also gives an insight into the client's historical transactions (Recent Portfolio and Service Requests). It also captures family details for monitoring important life events.

Portfolio Management – The features of Portfolio Strategy and Planning helps in capturing the interests and preferences of the customer, and gives a 360° view of the customer's portfolio. The Goal Management features can effectively track the performance of the portfolio. It also captures news feeds and market voices for holistic Risk Management with enhanced portfolio rebalancing alerts.

Service Request Management – This feature uses notifications, which are generated for creation, completion, and escalation of service requests. Using Knowledge Base articles to enhance team capabilities in resolving service requests is also a part of this feature.

Notification Framework – This feature helps in providing suggestions for cross and up-sell opportunities and extends to Service Request Tracking.

Key Benefits

- **Efficient Processes** – Improving the Customer Relationship Management process by simplifying administrative tasks with Automation
- **Effective Targeting** – More focus on HNI Clients and providing them with enhanced quality of service through improved targeting through customer segmentation
- **Real-Time Monitoring** – Monitoring and analyzing customer needs to increase cross and up-sell opportunities, using the Notification Framework
- **Client Delight** – Allows for providing better service quality along with real-time information, leading to increased customer loyalty, thereby creating "One Customer Experience"

For more information, contact askus@infosys.com

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