



## INFOSYS HELPS A LARGE FINANCIAL SERVICES COMPANY TRANSFORM CUSTOMER EXPERIENCE

### Abstract

The client, a premier financial and wealth management service provider, wanted to deploy a digital-first CRM solution that would support next-gen capabilities and enhance the customer experience. Implementing this at scale required complex integrations with numerous, siloed client systems in 200 branches across the country. Infosys leveraged a powerful suite of Oracle Cloud solutions to deliver a comprehensive digital transformation CX program that is helping the client achieve omni-channel customer experience while improving agent productivity and issue resolution.

## Client Background

Headquartered in India, the client offers comprehensive wealth management and financial advisory services. Their chief financial products include dematerialization (demat) and trading accounts, mutual funds, insurance, bonds, government securities, and other financial products for retail and institutional customers. It has a pan-India presence with over 200 branches, a strong sales force consisting of more than 1000 sales representatives, and a customer base of over 50 million.

## Business Objectives

The client wanted to implement a customer relationship management (CRM) system and marketing automation program that would cater to their current and future CRM requirements. The solution had to be digitally enabled so as to integrate with business processes and increase agent efficiency. Some of the key requirements were:



Enable integration of multiple siloed back-office applications containing various types of data



Provide a consolidated customer view for enhanced customer service and revenue opportunities



Automate sales, service, and marketing processes to reduce response time when handling customer issues



Reduce the number of touchpoints or systems that agents needed to navigate when checking and responding to customer requests/queries



Enhance reporting capabilities and improve system performance and maintenance for a better user experience



Leverage a data-driven approach in the areas of marketing, sales and quota planning, and incentive compensation

## Infosys as a Strategic Partner

Infosys designed a digital transformation solution using Oracle Customer Experience (CX) platform. Leveraging its strong implementation expertise, Infosys helped deploy the solution across the 200+ service branches of the client across India.

As an Oracle certified partner, Infosys provided cutting-edge expertise along with accelerated delivery of technology. The solution included Oracle Marketing Cloud, Maximiser, Oracle DMP, Oracle Sales and Service Cloud, Oracle Digital Customer Service, Oracle Incentive Compensation, and Oracle Sales Planning. Other tools included Spring Boot Services, REACT JS, and TIBCO Mashery.

The solution is efficient and scalable and can seamlessly integrate with various other systems and interfaces to meet the clients' current and future needs.

## Key Challenges

### Marketing challenges

The client faced limitations in its campaigning and email promotion capabilities. There was a lack of personalized product messaging to engage customers. Also missing was a structured approach for lead nurturing with periodic messaging.



### Sales challenges

The sales function did not have a 360-degree customer view due to the absence of a central customer database, which compromised customer insights. They were unable to segment sales according to financial products. Moreover, the current lead management process was rigid and manual.



### Service challenges

Customer service involved manual processes for customers to submit service requests at the branch. Fragmented internal systems led to higher call handling times, poor service experience, and rising customer dissatisfaction.



## Infosys Solution

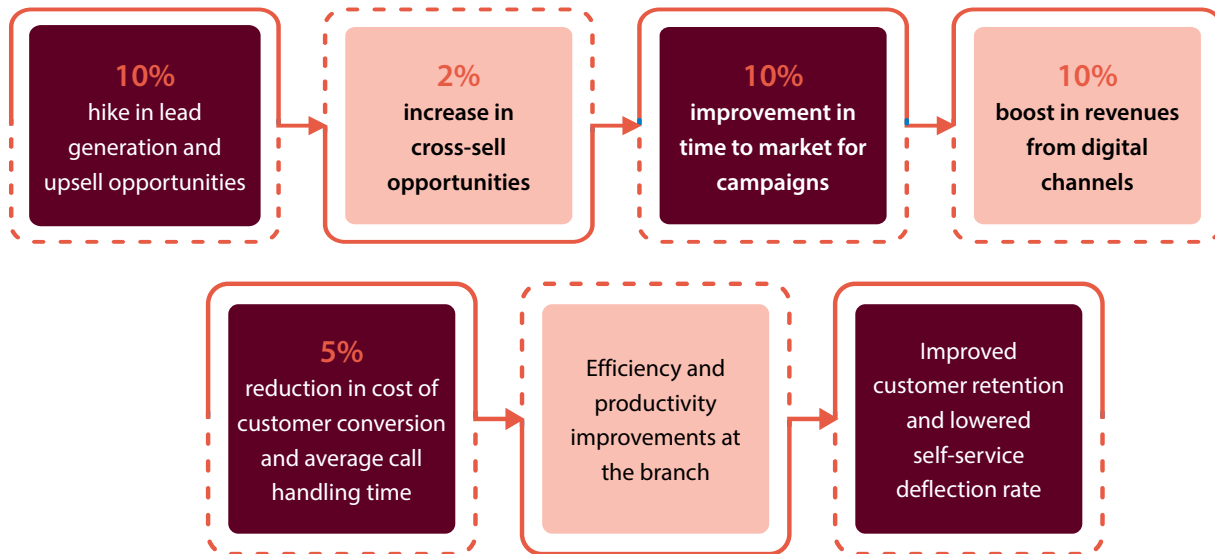
The Infosys CX solution focused on automating the existing marketing, sales and service business processes. The key solution highlights are:

- **Digital experience** – Infosys enabled omni-channel customer connections for client by implementing a 360-degree customer dashboard. This gives the client single-click views into customer data. Timely customer insights have accelerated call handling times and improved agent efficiency.
- **Personalized content** – Infosys digitalized the existing incentive compensation processes and implemented out-of-the-box Oracle IC processes. We also upgraded the client's website, allowing customers and visitors to access personalized content based on their interest.
- **Smooth integration** – Infosys enabled seamless real-time integration of the customer experience application with more than 20 legacy applications using TIBCO Mashery and Spring Boot microservices.



## Benefits

Digital transformation of their CRM and CX systems is helping the client achieve benefits such as:



## Conclusion

Implementing Oracle Cloud with its marketing, sales, and service modules has given the client a digital customer experience platform that supports next-gen capabilities for personalized customer service. [Infosys Oracle Cloud Services](#), part of [Infosys Cobalt](#), used its strategic partnership with Oracle to recommend best-fit solutions and implement these seamlessly. The new platform is helping the client improve customer retention, agent efficiency, and revenue growth.

For more information, contact [askus@infosys.com](mailto:askus@infosys.com)

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