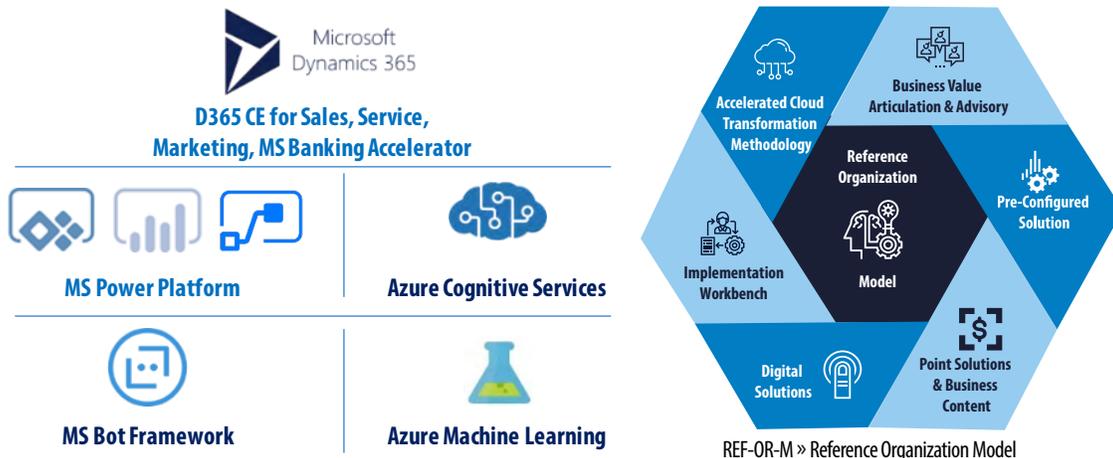


REF-OR-M SOLUTION FOR CUSTOMER ENGAGEMENT IN BANKING

The REF-OR-M solution built for CE in Banking, is a pre-configured, end-to-end reference solution, tailored to suit Customer Engagement practices for the Banking sector. Our solution comprises of end to end process flows, foundational solution components, proven best practices from successful D365 transformation engagements in the Banking business, brought together in a unique solution concept to achieve greater business value with Microsoft Dynamics 365.



Solution Components



Solution Capabilities & Business Process Breakdown

	SALES	MARKETING	SERVICE
Pre-Configured Dynamics 365 CE for Banking	<ul style="list-style-type: none"> Lead & Opportunity Management Cross Sell/ Up Sell Customer Data Management Sales Forecasting Customer order management Account Management 	<ul style="list-style-type: none"> Segmentation Management Campaign Management Campaign Response Management Campaign Planning/ Budgeting Campaign Activities Management 	<ul style="list-style-type: none"> Contact Center Management Self-Service Management Service Request Management Staff Management SLA Management
Features of Microsoft Banking Accelerator	<ul style="list-style-type: none"> Opportunity Business Process Flows for Retail & Commercial Banking KYC Checks for Retail and Commercial Banking Person and Customer 360 		
Additional Point Solutions & Digital Solutions	<ul style="list-style-type: none"> KYC, A/C Origination & Churn Management Sales Insights, Intelligent Sales/NBA RM/WM Productivity App Sales Productivity Bot C360View Call reports 	<ul style="list-style-type: none"> Marketing Metrics/ Insights 	<ul style="list-style-type: none"> Service Metrics & Insights Intelligent Customer Service IVR for Customer Care Employee Service Bot Banking Service Bot Productivity Bot

Solution Capabilities & Business Process Breakdown

Business Value Articulation

- About the business value, solution alignment, processes break-down / design, and road-map

Pre-Configured Solution

- Ready to run foundational configurations specific to CE in Banking covering above processes
- System specific process flows for further customization analysis

Point Solutions, Business Content & Digital Solutions

- Extension Solutions specific to Banking Industry requirement
- Digital Solutions (like chatbots / AI/ML etc..) available in ready to deploy state, specific to customer context

Applicability of REF-OR-M Solution

- **Greenfield implementation, Upgrade** or move to modernization using a digital platform like Dynamics 365
- Focus on building application in **agile and incremental** way
- Enable the **business users early in the game and discover the solution with a Show-and-Tell approach in language of Banking** rather than only Tell approach
- Leverage **best practices from successful** Dynamics 365 transformation engagements to achieve greater business value



Key Benefits



Digi-Tech / Industry / LOB/ Domain Expertise



Agile & Accelerated Approach



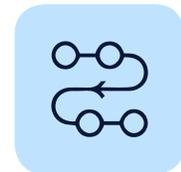
Enhanced User Experience



Incremental & Adoptive Solution Building



Reduced TCO & Faster Deployment, Lower Risk



End to End Offering

For more information, contact askus@infosys.com

Infosys[®]
Navigate your next

© 2019 Infosys Limited, Bengaluru, India. All Rights Reserved. Infosys believes the information in this document is accurate as of its publication date; such information is subject to change without notice. Infosys acknowledges the proprietary rights of other companies to the trademarks, product names and such other intellectual property rights mentioned in this document. Except as expressly permitted, neither this documentation nor any part of it may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, electronic, mechanical, printing, photocopying, recording or otherwise, without the prior permission of Infosys Limited and/ or any named intellectual property rights holders under this document.