Empower RMs through AI based customer insights

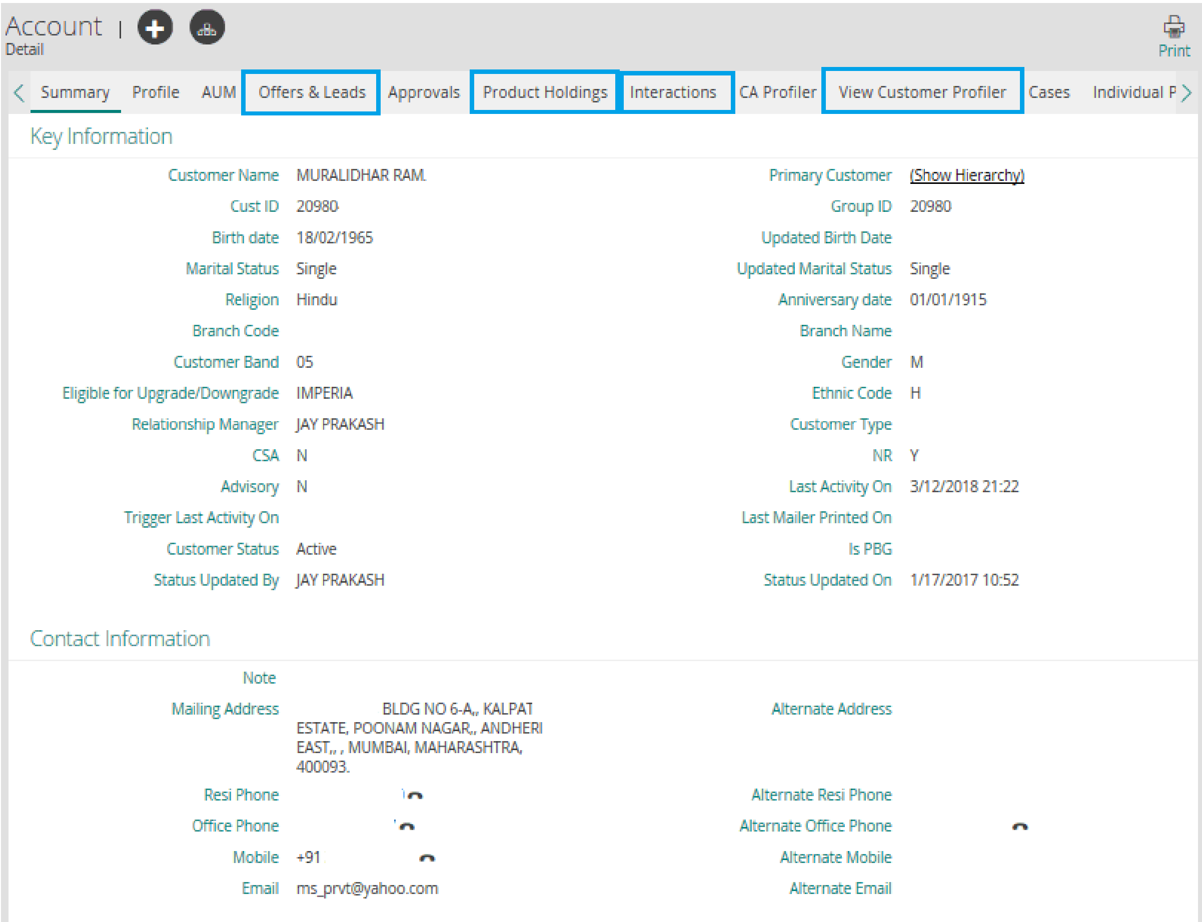
In CRM, the RMs and their Supervisors have to access multiple TABs for information about customer w.r.t Offers from the bank, Product holdings, RM Interactions, Profile of the customer.

The RM refers this information prior to engaging with the customer. The supervisors are also expected to refer this information to recommend or instruct the RM on their next engagement with the customer.

Problem Statement:-

Plethora of Information to be referred to know the customer & decide next cross sell pitch.

CRM – Existing System: Below are the multiple tabs which RMs & Supervisors refer.



Proposed Solution: A single view AI based customer insights empowering RMs with brief insight across customer information in CRM.

Customer Insight include :-

- Product based Insights i.e. current products used by customer
- Products/Services in which customer has shown interest
- Whether customer has life Insurance or has taken loan
- Customer Sentiment – Happy/Unhappy/Not Interested/Interested

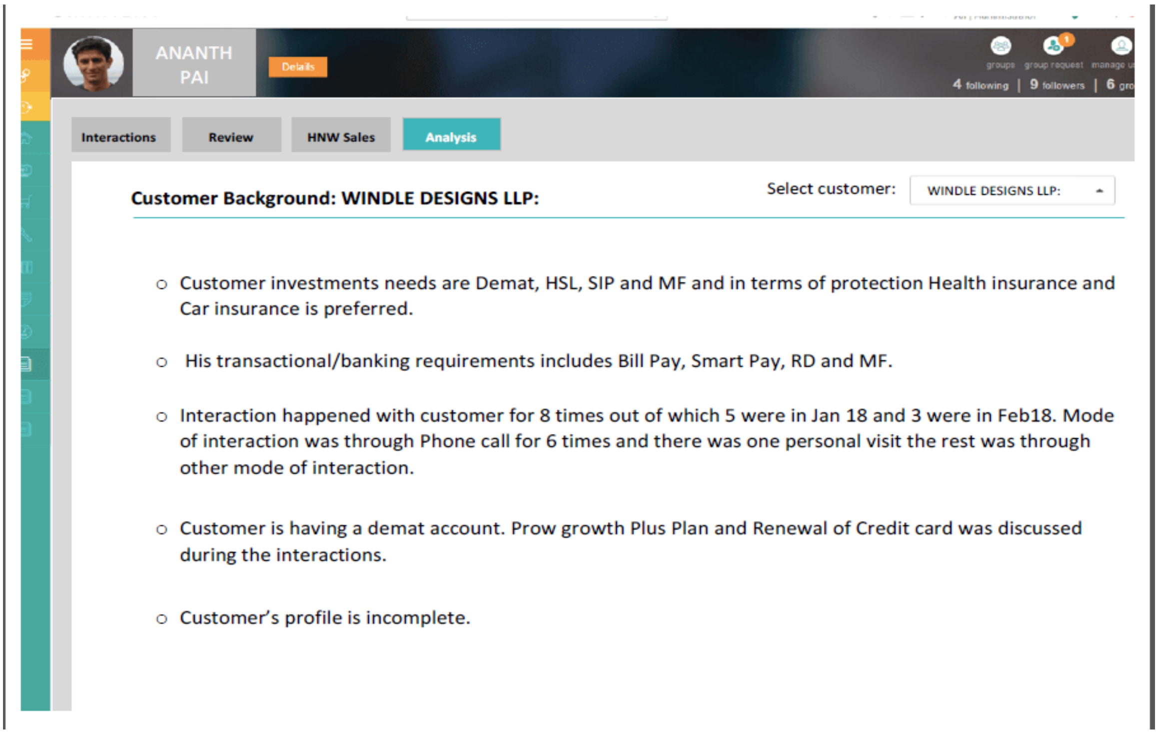
Supervisor Analytics: Provides analysis across all RMs for Supervisor like –

- Total no of RMs allocated, no of interactions done by each RM, Mode of contact of interactions
- Trend analysis on pattern of interactions like decline or increase
- Products mentioned in interactions by RMs
- Whether previous interaction tasks are accomplished or pending
- Overall customer sentiment on comments in service interactions
- Whether the customer's need is regularly met or not met

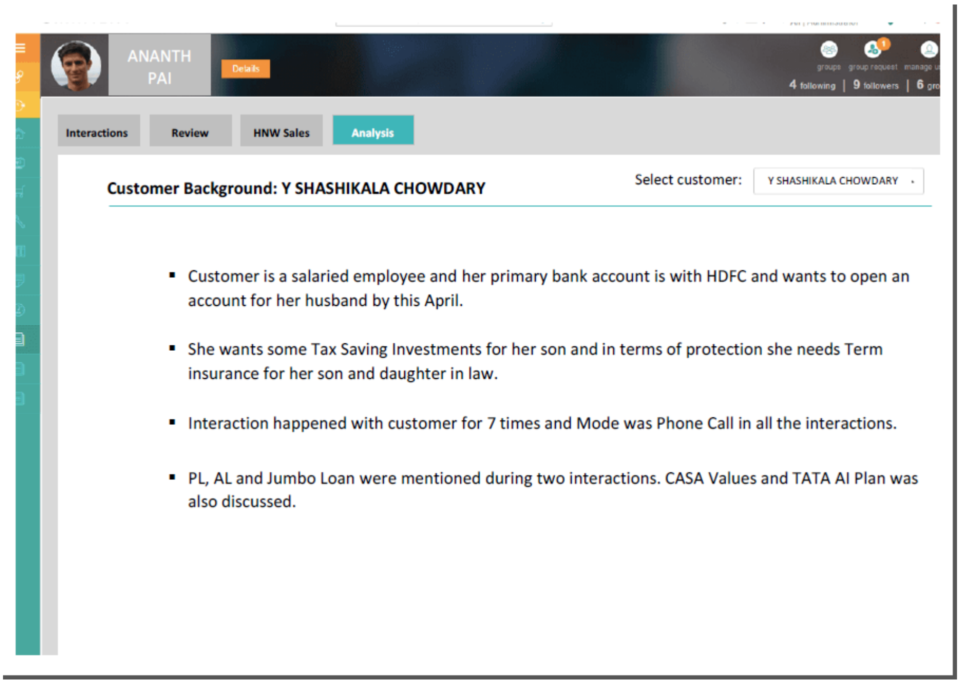
Sample Reports of the proposed solution – to be made available in CRM

Enclosed are the samples reports generated as part of POC using CRM data across Service Interactions, Customer profile and HNW Sales process.

Sample 1



Sample 2



Supervisor Analysis to know RM engagements with customer

The snapshot provides information to Supervisor on the RM engagements with their customers, interaction trend, products pitched and TOP RM performer engaging with customers.

Sample 1