

Large public sector bank in Asia – we implemented a app based lead management and workflow solution for corporate banking relationship managers

Situation

- One of Asia's largest public sector bank with a global loan book of ~\$59 billion present in 25 countries
- Domestic corporate loan book was de-growing 10% in H1 (y-o-y) while the market (including private players) was growing ~5%
- No central lead management system in place; each RM had a different method of tracking their pipeline.

What we did

- Developed a mobile based lead management app for corporate banking relationship managers to record and progress leads in a standardized way
- Deployed the tool with 150 relationship managers nation wide
- Developed a corresponding workflow solution to track lead closure
- Implemented cascaded performance dialogues to review lead funnel progress across regions

M&S Expertise



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Impact

- Direct: In H2 compared to H1
 - Domestic loan book eventually grew by 7%
 - RM warm lead generation increased from 3 to 7 warm leads/month
 - Quarterly lead conversation ratio improved from 15% to 37%
- Indirect: Change of focus and customer orientation
 - Focus of media interactions changed from monitoring of bad loans to growing corporate franchise
 - Customer feedback helped Bank develop differentiated products and services