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| Program/Area: | I&M Bank: CRM Implementation |
| Meeting Purpose: | Lead to Customer onboarding Integration between CRM & Digital Factory. |
| Meeting Date: | 29/May/2018 |
| Meeting Time: | 10:00 am EST to 11 am EST |
| Meeting Location: | Conference Call |
| Meeting Facilitator: | Christine Sawanda |
| Attendees: | CRMNext: Imtiyaz A, Manish Jain, Mainakh Bhattacharjee, Nitin Goel.  I & M Bank: Christine Sawanda, Kishen Madhvani, Fredrick Malela, Wangu  Infosys: Sathish  McKinsey: Joh |
| Minutes Issued By: | Imtiyaz A |

| Discussion: (Items/Knowledge Shared) |
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| * 1. CRM implementation overview provided by Imtiyaz   2. Wangu and Joh provided the overview on digital factory implementation.   3. Both teams explored multiple ways of Integrations involving Systems such as Digital factory Web page, Micro services, Digital factory DB, Fiorano, Finacle, Card System and Bancassurance etc.   4. Below are the discussed Integration options and amendments needed in ongoing solution   5. Current Digital Factory proposed process      * + 1. The customer (mostly NTB) will login into web page of digital factory and will provide the customer details and product preference.     2. On submit button, the web page calls the micro services of Digital factory. In turn,        1. the request goes to Finacle by calling Fiorano services        2. also, the details gets stored in Digital factory DB     3. If the provided details are accurate, Finacle generates the CIF/account number and sends the response back to Digital Factory on the basis of Reference# generated from the web page for the request.     4. If the CIF/Account number cannot be generated based on provided details, Finacle sends the error code back to Digital Factory on the basis of Reference#.     5. The Customer can check the status of the request on web page based on reference#.     6. The customer can also take print of application form and visit the branch for CIF/Account opening.     7. When the customer visits the branch, the branch officer can login into Finacle and fetch the filled customer information from Digital factory DB based on reference# and complete the customer onboarding process.      * + 1. The orphan non closed requests in Digital Factory for (let us say for15 days) can be brought into CRM as warm leads either through batch Job or import functionality.   1. The digital Factory will also integrate with Cards and Bancassurance systems as scope of Phase 1 with the timelines of Aug ‘18.      * 1. **With CRM Inclusion**:      * + 1. The CRM will push the hot leads with customer consent to digital Factory by calling Fiorano Service.     2. The Digital factory will store reference System ID along with Reference# and will send the details to Finacle, when CIF is opened / Account is opened     3. As a reverse response Finacle will share CIF, Account# as well as Status back to CRM through Digital factory and Fiorano as interface.     4. In case, CIF/Account Number does not get generated, the information will be manually pull by branch officer from Finacle based on reference# (CRM Lead + Deal Id) and reference System.     5. This interfacing will be available in principle for all the product systems such as Finacle, Cards, Bancassurance, LOS, Trade Finance, Treasury, etc.     6. The timeline for CRM Go Live is by Mid Nov. The McKinsey will discuss it with bank on further details.   1. In short, the digital factory to serve as common Onboarding process.   2. The masters and lookups of Finacle will supersede all the system masters. CRM will be using Finacle masters through Vision and SFE Web tool.   3. The McKinsey to share the product wise mandatory fields with CRMNEXT in digital web portal for better understanding on fields. |
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| Decisions Made: (What, Why, Impacts) |
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| 1. The digital factory to serve as common Onboarding process across all systems including Bank CRM. 2. The digital factory integration with CRM to happen through Fiorano. 3. The digital factory to store System Name and corresponding reference# from all the systems. 4. Account opening process will remain in branch where massaged data will be used by Bank officer without calling customer to branch as customer had already consented for account opening post which CRM will share the ETB/NTB leads with digital factory for account opening. 5. McKinsey to share the product wise mandatory fields with CRMNEXT in digital web portal for better understanding on fields Solution approach document including mapping of all RFP requirements and corresponding work around to serve as Single document for delivery and testing reference. 6. Bank side stake holders to discuss the way forward on integration between digital factory and CRM.   The following integrations will be required between CRM & DF & OLTP systems.   * 1. CRM to send Hot Leads to Digital Factory using Fiorano.   2. In return, Digital Factory should process the lead through existing mechanism with Finacle/ Bancassurance/ Cards systems and send the status back to CRM.   3. The finacle will send the Lead processing status through Digital factory/Fiorano back to CRM on real time basis on the basis of System ID and Reference#.   4. Customer onboarding in CRM will happen in a day end job from Finacle.   5. Long pending/non processes customer details in Digital Factory can be created as lead in CRM through Day end process or through Import functionality in CRM. |

| Next Steps: (Task, Assigned to, Checkpoint Date) | Owner | Due Date |
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| McKinsey to share the product wise mandatory fields with CRMNEXT in digital web portal | McKenzie | 31 May 2018 |
| Bank Stake holders on CRM and digital factory side to decide the way forward on integration | Bank | 4 June 2018 |
| Meeting involving Fiorano, Finacle, Digital Factory and CRM to finalize field to field mapping | Bank | 4 June 2018 |