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| Program/Area: | I&M Bank: CRM Implementation |
| Meeting Purpose: | Customer 360 View an lead creation Integration between CRM & OMNI Channel teams |
| Meeting Date: | 29/May/2018 |
| Meeting Time: | 16:30 EST to 17:00 EST |
| Meeting Location: | Conference Room |
| Meeting Facilitator: | Christine Sawanda |
| Attendees: | CRMNext: Imtiyaz A, Manish Jain, Mainakh Bhattacharjee, Nitin Goel.  I & M Bank: Christine Sawanda, Joachim  OMNI Channel: Kedar, Vasant |
| Minutes Issued By: | Mainakh Bhattacharjee |

| Discussion: (Items/Knowledge Shared) |
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| * 1. CRM implementation overview provided by Imtiyaz   2. Kedar and Vasant describe OMNI Channel implementation.   3. Both teams explored multiple ways of Integrations involving Systems such as OMNI Channel, Fiorano etc.   4. Below are the discussed Integration options and amendments needed in ongoing solution   5. Proposed OMNI Channel Lead Creation in CRMNEXT.      * + 1. OMNI Channel (Internet banking as well as mobile banking) will call Bank CRM web service for the service request raised by ETB customer showcasing interest in new product. This service call will be real time.     2. Bank CRM will create a lead in CRM by passing CIF, Product details etc. fields.     3. Lead will be assigned to RM in bank CRM and a lead Id will be sent back to OMNI Channel.     4. This lead will go through further prospecting process within CRM by RM.     5. Once prospecting is done, the “Bank CRM” will send lead to digital factory for customer onboarding.     6. Digital Factory will process the lead as per ASIS process. {Please see the MOM dated “29th May 2018”on meeting with digital factory for more details.}     7. As discussed with OMNI Channel team & Bank – the communication from OMNI channel to Bank CRM will be one way and through Fiorano. However, if bank wants, they can work along with OMNI Channel team to share the webservice to get the reverse feedback from “Bank CRM” based on lead Id.        1. Bank to work along with OMNI Channel team to finalize the approach.     8. Illustrative Bank CRM Web service to generate the lead real-time in bank CRM.  * 1. Bank CRM will require integration with OMNI Channel for displaying the following on Customer 360 for individual as well as group banking.  1. Customer Details: This will include the fields such as: 2. Corporate ID (/Account Number) 3. User ID. 4. Customer names. 5. Registration date. 6. Validity from/to date. 7. Token type product. 8. Mobile number. 9. Email. 10. User status. 11. User level. 12. Limits. 13. Authorizers 14. Monthly Reported: This will include the fields as: 15. Transactions amounts/values. 16. Number of registrations. 17. Clients who transacted previous month but not transacted the following month. 18. Income and fees per RM's.     1. OMNI Channel to expose the real-time service to fetch these details into CRM.     2. The same is displayed in the table below:  |  |  |  | | --- | --- | --- | | **Integration Requirement** | **Description** | **Fields to show** | | Customers details | It should provide up to date customer details./ Per customer | Corporate ID (/Account Number),User ID, Customer names, Registration date, Validity from/to date, Token type product, Mobile number, Email, User status, User level, limits, Authorizers. | | Monthly reported | It should provide up to date reports on the values and amount transacted during the entire month./Per Customer | Transactions amounts/values, Number of registrations, clients who transacted previous month but not transacted the following month, Income and fees per RM's. | |
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| Next Steps: (Task, Assigned to, Checkpoint Date) | Owner | Due Date |
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| OMNI Channel team along with Joachim to discuss the lead process (reverse feedback) to store lead id within OMNI Channel system. At least forward integration will take place for internet and mobile banking | Bank | 6th June 2018 |
| OMNI Channel team to provide web service details including WSDL, sample XML, field list etc. for customer details and Monthly Reported details. | Bank | 6th June 2018 |
| CRM to provide the sample Wsdl for lead generation process with OMNI Channel. | CRMNEXT | 6th June 2018 |
| Bank to arrange meeting involving Fiorano, OMNI Channel as well as CRMNEXT teams. This will enable to finalize web service call flow-technical needs involving Fiorano, OMNI Channel as well as “Bank CRM”. | Bank | 6th June 2018 |