

# MOTILAL OSWAL FINANCIAL SERVICES LIMITED

## PROJECT SYNOPSIS

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### Projects Undertaken:

1. Comparative Study Report on Motilal Oswal and its Competitors
2. Knowledge Audit of Relationship Managers
3. Global Innovations in Finance

### Description:

1. Website and app of Motilal Oswal and top competitors were compared and the differences which were either not good or less user-friendly were suggested
2. Sales audit was done on about 300 relationship managers on incentive policy and the weak and strong areas were identified and parameters to work upon were recommended
3. In-depth research on applications of new technologies in the top 10 Indian and international financial institutions and their usage on the worldwide exploitation of social media platforms and data analytics

### Objectives:

1. Study upon the website and app of different financial service providers to identify the shortcomings and recommend the appropriate solutions
2. Identify the knowledge-level of relationship managers with respect to incentive related parameters to gauge their understanding on incentive calculations
3. Identify the extent of applications of new technologies and analyze the implications of chatbots of different companies to figure out their query solving potential

### Outcomes:

1. Get an upper edge over the competitors on the web platforms, 'Update Your Aadhaar' option started working, 14 major differences were identified and appropriate suggestions were recommended
2. Identified the branches which require more attention in terms of RMs training and appropriate TNI were shared
3. How artificial intelligence, machine learning, and data analytics are being used worldwide and which of these technologies can be implemented in Motilal Oswal; like SBI's SIA chat assistant is setup to handle nearly 10,000 enquiries per second and HDFC's Eva has addressed over 2.7 million queries and interacted with 530,000 customers till date