

Commercial Banking CRM Transformation

A key enabler for cost reduction and optimisation in operations which helps improve NPS and Customer Experience.

CLIENT CHALLENGE

Heavy Customization Existing system is not User friendly due to very high Customization

Inefficient and long process's Single view of Customer is not available resulting significant re-keying of information causing inefficiency across Business Units

Customized solution for each Business Unit Every BU implemented their separate CRM solution causing high maintenance cost

End of life/Support – Multiple Technology/integration are at end of life and lined up for decommission.

ACCENTURE SOLUTION

Revamped the CRM D365 Solution delivering a great customer service with high SLA performance and single view of customer

Less Complex CRM D365 on Cloud CRM solution moved from On-Premise to Cloud Services and complexity reduced with 80% OOTB

Business Banking Integration Business banking functionalities are integrated on same platform with CPB

Automation Integration with Artificial Intelligence and Robotics process to automate end to end bank processes and Service functionalities to deliver better client benefits

KEY PROGRAMMES/VALUE STREAMS

- **Service & Sales Transformation** – Migration of existing CB (CRM 2013) and BB (CRM 2011) functionalities to D365 along with transformation of processes to improve performance.
- **Data Transformation** – Transformation includes data ingestion , processing and consumption of the 365 CRM Data and publish Power BI reports
- **Integration Delivered** 10+ integration delivered to support transformation and future scope of work.
- **Digital Channels** – Onboarding of Agents on CRM and enablement of calling facility with Customer authentication to present agents with single view of customer for better Customer interaction & Support.
- **Service Automation:** Automating end to end business processes to reduce manual efforts and delivering better Customer value.
- **2023 View:** Below deliveries are planned for 2023
SBP, Lending, CRM Mobile, Financial Health Check, Digital Appointment Booking, Broker Leads, Para, Sales workflow etc

VALUE DELIVERED

- **Single view of Customer** by implementing single agent desktop across Commercial and Business Banking
- **Improved Customer Advocacy** by NPS uplift for assisted customer journey
- **Cost Reduction** by
 - End to end process automation and Service Automation
 - Resulting in increased FTE productivity
 - Legacy System Reduction
- **Revenue Growth** by enabling stronger deal management & Supporting RM better engagement with Customers and drive sales
- **Increased Colleague Satisfaction** through improved retention and better colleague experience