

# Case Study - Axis Bank

## Driving sales efficiency with a unified CRM Platform

78,000+ Users | 2,700+ Branches | 7 Countries  
Integrated with 16 applications | De-commissioned 7 applications



CRMNEXT

### Challenges

- Integration with external and backoffice systems to provide comprehensive & actionable customer 360° view to RM's.
- Manual tracking of data and preparation of MIS reports with lag in data resulting in only a post mortem rather than timely decision making.
- Manual and tedious tracking of action plans using spreadsheets using data from disparate systems.
- Difficulty in co-ordinating actions and meeting plans.
- No common system to manage opportunity pipe line across business lines & geographies.

### Solutions



#### Relationship Management

- Integrated with 3rd party profiling sites for ready, verified customer information.
- By recording details within the system, RMs can build rich, detailed profile and history that lays the foundation for a more meaningful, long-term business relationship.



#### Account Planning

- For Existing-to-Bank Customers, track Budgets/ Annual plans with current Achievements.
- RMs can track wallet shares to ensure they're performing in top gear!
- Plan and execute the journey from prospect-to-opportunity-to-customer for New-To-Bank customers.



#### Calendar Management

- CRMNEXT helped to drive efficiency with an intuitive, mobile feature which gives them a quick snapshot of tasks, appointments, meetings et al on a unified Calendar.



#### Opportunity Management

- RMs have trashed those excel sheets and trail-mails forever. Managing an opportunity, is now super convenient with one system, online, for anytime, anywhere access.



#### Performance Management

- Catalyst Performance Modeler™ enabled smart planning and review of RM activities from a single screen. This could roll-up on basis of hierarchies & teams.
- Real time visibility of opportunity pipeline forecasting & conversions.

### Results

**250%** Increase in lead conversion volumes

**160%** Increase in referral sales

**247%** Increase in campaign ROI

**68%** Improvement in sales turn around time

**40%** Reduction in rework of sales process

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