



CRMNEXT

Case Study

ICICI Revamping business strategies with a unified CRM platform



50,000+ Users



4,500+ Branches



19 Countries



23 systems
Integration

Benefits

Delightful Customer Experience

Intuitive interface with a clear process helped improve customer journeys from needs to fulfillment

Streamlining Customer Engagement

Consistent messaging and visibility at all touch points helped streamline the entire customer management process

Amplified Workforce Performance

Improved team productivity resulted into higher lead generation and conversion with complete accountability over the entire process

Increased Cross Sell

Shared events and personalized offers across all touchpoints resulted in more cross selling opportunities with higher conversion rates

Actionable Performance Insights

Transparent visibility of Sales and RM activity helped to bring in accountability and boost productivity

Challenges

- Siloed and multiple systems used by different business lines for sales management.
- Tedious customer on boarding process with fragmented process visibility and status tracking.
- Difficulties in tracking relationship management activities, pipeline management and conversions.
- Limited visibility of events and campaigns organized by branches and particular business sales team to other nearby branches and sales teams.
- Hopping between multiple systems for getting customer information.

Complete Sales Management

- Capturing leads across channels on a single integrated platform including web, mobile, email, SMS, branch, etc
- Displaying cross sell offers based on various triggers across all touch points with fast track closure process
- Complete profile capturing and action items in prospect and customer 360 view
- Closing the loop between sales and marketing by tracking lead conversions and ROI

Customer On Boarding

- Managing end to end on boarding process on a single system by integration with back office and line of business systems
- Easy on boarding process for all products with guided call scripts for cross selling and service activations like bill pay, internet banking, debit cards etc
- Multiple alert facility at each stage to keep customer informed of on-boarding process
- RM activity calendar management and travel reimbursements

Solutions

Campaign Management

- Quick and easy creation of campaigns and events across with automated approval process based on pre-defined checklist
- Ability to invite partners and alliances to increase event reach
- Giving visibility of campaigns to all sales teams and nearby branches with ability to participate. Thus boosting ROI
- Quick view of campaigns directly through calendars
- Detailed catchment area information and actionable intelligence through integration with Pitney Bowes

Performance Management

- Creating plans and setting targets based on multiple parameters like no. of accounts, customer mix, product mix, users, territories etc
- Implementing real time tracking mechanism by displaying conversions at each stage on a single consolidated screen
- Auto-calculating the required number of leads, campaigns, interactions and conversions on daily basis
- Develop timely course correction strategies to ensure target achievement

The Results

Campaign Management

170%
Increase in leads generated

65%
Increase in response rate

200%
Increase in campaign frequency

45%
Increase in campaign ROI

Sales Automation

35%
Increase in lead conversion

50%
Increase in cross selling

40%
Improvement in sales TaT

80%
Increase in planned relationship activities

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