

Customer Management Excellence

Transforming Customer Service for Premier Mutual Fund Management Giant

Leveraging Dynamics 365 On-Premises



Client Overview

This leading Mutual Fund Management company with over 5000 employees brings domestic market strength and a proven track record of successfully building businesses that focus on meeting customer needs. It endeavors to offer a variety of mutual fund schemes pan-India, with a special focus on rural and semi-urban areas.

Pressure Points

Our client was facing challenges with disjointed Customer Services processes, prompting a need for streamlining the process from initial first contact to issue resolution. There was a dire need for a more cohesive and responsive Customer Service framework.

Challenges in addressing customer inquiries about Account Statements, Holding Details, NAV, expense ratio, and exit load leading to delays and inefficiencies in issue resolution.	Streamlining the entire Customer Service process from First Contact to Final Resolution of the issue.	Juggling disparate platforms to handle customer queries, including those related to asset allocation, Systematic Transfer Plan, SIP option, and Holding Details
Building One stop shop for all the Customer Queries	Enabling seamless integration with various other systems to provide 360 Degree view of the customers Data	

Solutions

Sonata helped the client build an integrated customer service management system through the implementation of Dynamics 365 Customer Service On-Premises.

The knowledge base repository offers invaluable support to customer service representatives, enabling them to effectively address customer queries	Integration with client's Portal and facilitating the Data Creation and updating from Portal to CRM through API	Integration with SMS provider and triggering SMS to Customers on Case Actions
Built Custom Application to extend the features of solution for Data Import and Export Functionality	Utilizing routing rules for cases provides an efficient solution, automatically directing customer inquiries to the most suitable agents, thereby enhancing the overall customer service experience	

Results

The implementation of Dynamics 365 Customer Service On-Premises has yielded significant improvements across various aspects of customer service management. By streamlining the complete customer service processes, efficiency in addressing customer issues has been notably enhanced.

The comprehensive knowledge repository significantly reduces Turn Around Time (TAT) for customer service representatives, enabling swift and accurate handling of customer queries	Utilizing routing rules efficiently allocates manpower by directing specific customer inquiries to the most suitable agents, optimizing operational efficiency	Cost savings due to improved productivity and operational efficiency
Ability to plan and manage manpower with data insights on case creation and types of issues trends	Seamless integration with various other systems that provide 360 Degree view of the customer's Data	