

Case Study

Customer Management Excellence

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