Making Relations Grow Stronger

Revamped Retail RM Platform

Business

A Young & Fast growing bank in India

Need

Modernize and Revamp legacy RM Platform

Solution

Cloud-native intuitive Web & Mobile RM interface

Transforming Digital Journey

Started with **Discovery and Design Sprint** to capture critical User Journeys. Helps to prioritize features for the new RM platform to be released in a 6 months' timeline

Complete Re-Architecture of existing legacy system to Cloud-based Microservices driven Web & Mobile Platform

Automated the Testing and Deployment process for faster turn-round times of new features release

Making IT happen!

Built a Customer 360-degree Digital Platform for Relationship Managers

- A **Unified Dashboard for Relationship Manager** to start their daily activities, identify **prioritized actions, meet Sales targets**

- Multiple **Microservices** created in this platform like - customer profile, customer demographics , recommendations , lead generation, task assignment etc. **Integration with CRM , Loan system** and other enterprise system who can consume these services

- Native Mobile app was built having features like geofencing, camera document upload, in-app notifications, **offline data sync**, dynamic form creation for case, tasks, leads, prospects and **biometric authentication**

- **Productivity enhancements for the entire RM Lifecycle. Intelligent recommendations** from the system to **Cross-Sell , Up-Sell**

- **Intelligent Reporting and Dashboards** for Supervisors to track Sales Targets of RMs

- **Calculating 'Customer-Value' Score,** which helps track and **predict typical behaviors like 'large money withdrawals'**, 'frequent account transfers' etc.

Enhanced Web & Mobile experience for RMs

Intelligent Data-driven suggestions

RM Productivity tracker for Supervisors

Cutting-edge tech for Next-gen

01
Increase in Sales conversion for RMs through Cross-Sell, Up-Sell

02
Omni-channel platform with seamless end-user experience

Intelligent Customer-Value tracking resulting in informed decisions

03
Higher customer satisfaction achieved due to faster response from RMs

Increased Happiness Factor…
Both in Sales & Customer satisfaction