

GEOJIT BNP PARIBAS INTEGRATING SALES, MARKETING AND CUSTOMER SERVICES WITH MICROSOFT DYNAMICS CRM CCA

Geojit BNP Paribas is one of the leading retail financial services company in India. As an pioneer in capital markets, they offer a wide portfolio of innovative savings and investment solutions, such as online trading, as well as deliver a diverse range of financial products and services, from Equities and Derivatives, Mutual Funds, Life & General Insurance, to third party Fixed Deposits. They service over 823,000 clients across India across multiple channels, maintain a strong national presence of over 511 offices.

overview

INDUSTRY
Financial Services

SOLUTION SUMMARY
Implement a CRM solution, focused on enhancing Sales, Marketing and Customer Support Service management

TECHNOLOGY
Microsoft® Dynamic CRM Customer Care Accelerator
Microsoft® .NET Framework
Microsoft® SQL Server
Microsoft® SQL Server Reporting

BENEFITS

- Unified Desktop System with Avaya CTI integration
- Improved Campaign Management
- Improved Customer Services Management

RESULTS

- Enhanced organization-wide access to customer information
- Improved productivity across Sales, Marketing and Customer Services

The Challenge

Geojit BNP Paribas needed an integrated system to manage their Sales, Marketing and Customer Service function in order to enable each of these business units to optimize their operations and drive productivity. The system would also serve as a crucial information interface and exchange platform that would ensure the transparency of information across all business departments and all levels.

The Solution

In order to integrate Geojit BNP Paribas's Sales, Marketing and Customer Service functions, PositiveEdge proposed and implemented unified desktop system to meet the needs of different business users across all three lines. The system was built on Microsoft Dynamics CRM using their Customer Care Accelerator (CCA) add-on and was designed to streamline the workflows of dealers and customer service agents involved in trading. Avaya CTI integration was added to the platform in order to grant the unified desktop the ability to capture and access customer telephony call information. Claims based authentication was also implemented as part of the solution, enabling Novell eDirectory users to access the Microsoft Dynamics CRM CCA platform.

The Benefits

The implemented Microsoft Dynamics CRM CCA solution integrated with Geojit BNP Paribas's existing systems, providing them with a full 360 degree view across Sales, Marketing and Customer Service functions. With the integration of systems across these three functions, all business users could easily exchange and access information, allowing Marketing to develop more effective and targeted campaigns while enabling dealers and Customer Care Agents to better interact with customers due to more readily available information from the CRM system during live calls.

The Results



With the unified desktop system deployed across Sales, Marketing and Customer Services, Geojit BNP Paribas was able to strengthen customer engagement across all three functions as well as drive customer conversion. Marketing's campaign management capabilities were improved with the increased access to customer engagement information while Dealers and Service agents were better equipped to manage customers across their entire lifecycle.

ABOUT POSITIVEEDGE SOLUTIONS

PositiveEdge Solutions helps customers design, develop and deploy software solutions for critical customer-facing business challenges. With our unparalleled commitment to customer and project success, along with our comprehensive knowledge of Microsoft technologies and broad industry experience and methodologies, we extend the capabilities of core business platforms to create commercial advantage for our customers. By leveraging our unique onshore/offshore delivery model, our consultants work around the clock to provide solutions quickly and cost effectively, which add measureable value to your business.