C Centric Solutions Private Limited
A subsidiary of Ernst & Young LLP

SALES MANAGEMENT FOR FINANCIAL SERVICES

CUSTOMIZED SALES SOLUTION DESIGNED FOR YOUR INDUSTRY

Our sales Management Solution is built on MSD365 CRM, specifically for financial services industry, and covers both retail and corporate sales functions of Banks, Insurance Cos, Mutual Funds and NBFCs. Separate templates for each of these industries - with individual data structures, preconfigured processes, automations and integrations gets you off the block quickly, while innovative solutions like location-based assignment, document capture and validation, customer profiler, notification framework etc. ensures unprecedented process efficiency and shortening of engagement cycle

Caters to all Channels

- Our solution integrates all the customer channels and ensures that no lead 'falls between the cracks'.
- Leads created through websites, external and third-party portals, web ads, social media, partners & agents, SMS, emails, phones (both inbound and outbound), walk-ins, sales & marketing outreach etc. are all addressed in the same manner, with the same processes and automation.

Shorten sales cycle and increase conversion

- A smart location-based assignment ensures that important leads are addressed in the shortest possible time
- Preconfigured business processes prompts the users through each step of the sales cycle, highlighting next actions, missing info, TAT & its adherence.
- A risk monitoring system ensures that we don't sacrifice on lead quality for process efficiency.
- An automated document upload, processing and validation module ensures that all the right documents are collected, uploaded and validated for quicker processing

All these contribute to higher conversion, shorter engagement cycle and higher profitability

Purpose-built for your Industry

The solution comes with separate templates for each Industry segment
The system comes with specific object model, data-structures and integrations for each industry (and each business lines within the industry.)
The system comes preconfigured with workflows, process flows, checklists, communication templates for each of the industries.
The industries covered are:

- Banking
- Insurance
- NBFCs
- Mutual Funds

Understand customers and drive cross sell

- A customer 360 view gives all relevant customer info at a glance.
- An unique profiler solution guides you through the process of collecting relevant customer data and build deeper relationships
- The system identifies cross-sell and upsell opportunities for a customer - based on the customer data, his engagements, products sold etc. and recommends cross-sell & up-sell opportunities.

All these helps you maximize the customer profitability.

Advantages

- **Purpose-built** - Built specifically for financial services. The sales processes, data requirements & integrations prebuilt to cater to your requirements.
- **Tested and certified** – Our solution is CfMD certified – Microsoft's highest quality certification for partner solutions.
- **Feature-rich** - Extensive functionalities born out of deep understanding of the financial services industry makes sure that most of your requirements are met out-of-box.
- **Flexible -** A flexible solution framework built keeping the requirements of financial services industry in mind. Allows you to configure your processes quickly
- **Large reference customer base**– this solution has been implemented by some of the biggest financial services companies. Contact us for more info and references
- **Built on a world-class CRM platform** – MSFT Dynamics CRM 365, that offers a flexible and adaptive development framework, built-in intelligence and a best-in-class cloud infrastructure.