APPLICATION OF AUTOPILOT FOR TECH DISTRIBUTOR, SYNTECH

On-boarding new resellers with Autopilot

In this Case Study, we will look at how Syntech leveraged Autopilot to streamline their reseller application process, making it simpler and more efficient whilst simultaneously enhancing their engagement with new resellers.

Syntech is a distributor of specialised IT hardware throughout Sub-Saharan Africa through mass, niche, and online retail resellers.

In the past, when a new customer wanted to register as a reseller they would need to manually complete a registration form in PDF and supply supporting documentation before being approved.

In many instances, new resellers would complete these documents on their PC and send large files to Syntech via email (a small portion of which exceeded mailbox limits and therefore bounced, never to be seen again). Others would manually complete the document by hand, before scanning and emailing it to Syntech.

In both scenarios, the information would need to be captured by Syntech staff and entered into their systems manually. This was not only a manual and time-intensive task, but it also created a bevy of potential data capturing issues. From illegible writing to human error during data capturing because no validation checks were in place.

The entire vetting and approval process would take at least 10 days to complete from the date of submission. Even in the best-case scenario, the customer's experience was one of antiquated manual processes, very slow turn-around time, and sub-par communication or engagement during this critical initial onboarding period.

**They needed Autopilot.
And they needed it fast.**

Enter Autopilot

By using Autopilot's streamlined approach to paperless onboarding processes, Syntech has now been able to streamline the engagement with their new resellers making it a lot more efficient. Their aim was simple – prioritize the customer experience.
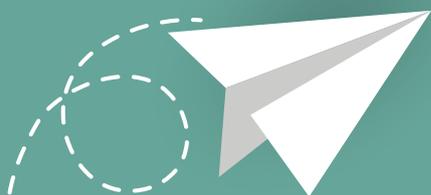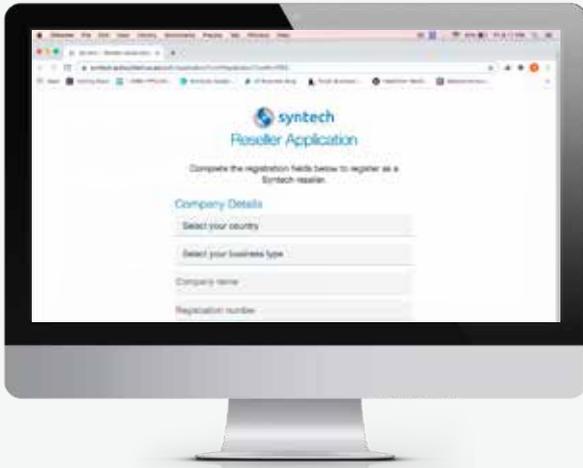
Here's a quick overview of the new client on-boarding solution that we implemented for Syntech.

New Syntech resellers are now welcomed by a fully digital form accessible through their browser. The form autosaves and allows customers to come back to their application and pick-up where they left off. That said, the digital form is produced far quicker and is a lot easier to complete as it pre-populates most of the fields with the business registrations details from the CIPC database.
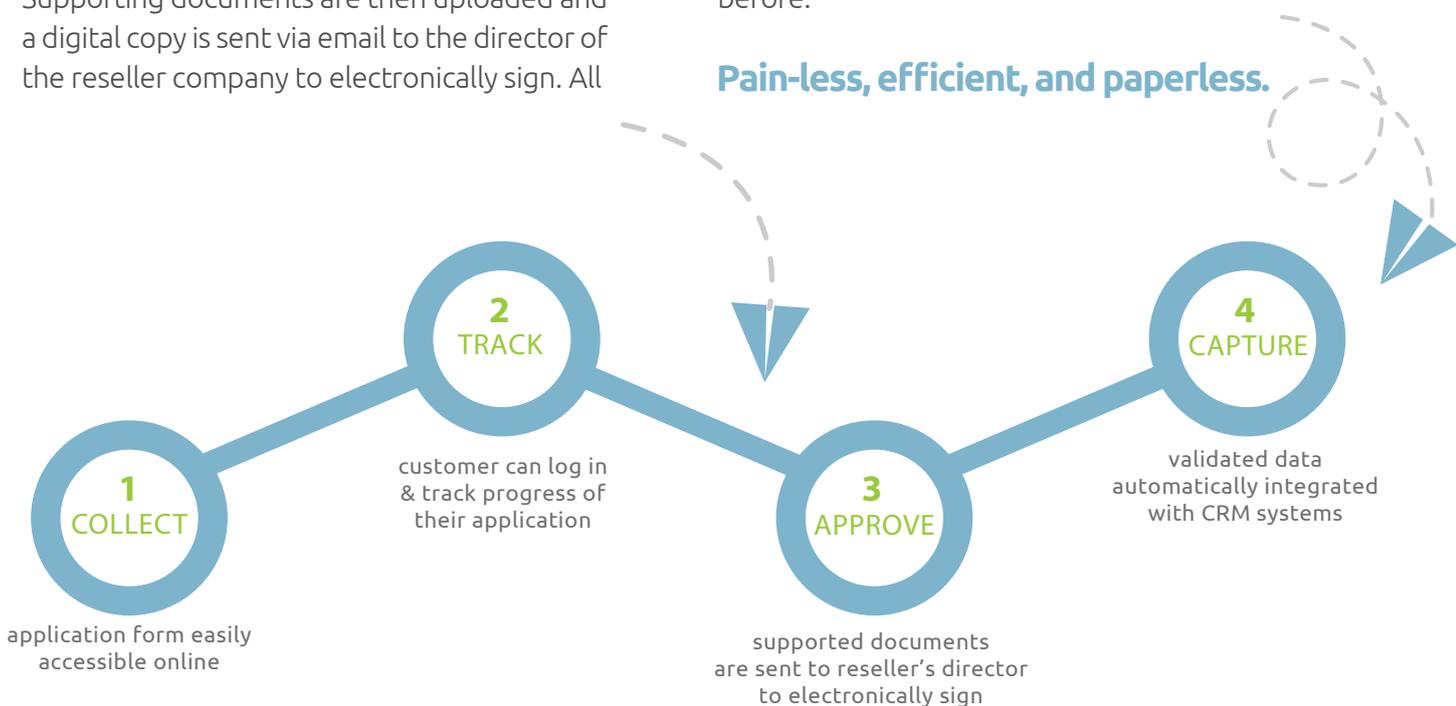
When logging back on, customers can track the progress of their application and Syntech is granted the opportunity to reach out at any stage of the process and assist where needed. Data and information relating to new clients are easily accessible and visible. With the tracking being automated, Syntech can provide industry-leading customer service for new customers (resellers) at each level of the application process and having added touchpoints for communication.

Supporting documents are then uploaded and a digital copy is sent via email to the director of the reseller company to electronically sign. All information with the supporting documentation is seamlessly captured through the system and can be approved within a matter of minutes after being submitted.

In addition, once the application is approved the validated data that Autopilot captures is automatically pushed to and integrated within Syntech's existing financial and CRM systems. This ensures that all records are accurate and that communication touchpoints with new customers happens much faster than ever before.

Pain-less, efficient, and paperless.

1
COLLECT
application form easily accessible online

2
TRACK
customer can log in & track progress of their application

3
APPROVE
supported documents are sent to reseller's director to electronically sign

4
CAPTURE
validated data automatically integrated with CRM systems

Today, with Autopilot effortlessly managing the on-boarding of their new clients, Syntech is able to run their practice more efficiently and more accurately – with less time wastage and far less stress.

Customers now spend a fraction of the time completing applications. The current record for a complete customer application is 10 minutes. On average, customers completed the application in one to three days. Customers are also getting feedback a lot quicker. Reseller approval times have been reduced from 10 days to one day through the automated application process. Autopilot's cloud-based solution offer a user-friendly platform that can also enhance new customer engagement and provide opportunities for integrated CRM applications such as Pipedrive.

IN SHORT AUTOPILOT HAS BENEFITED SYNTECH IN THE FOLLOWING WAYS:

▶   Quicker on-boarding of new clients.

▶   More accurate information transfer.

▶   Effortless integration into existing systems.

▶   Easily accessible data tracking.

That's Autopilot. Doing what it does best.
Making work flow faster, effortlessly and more accurately.

Autopilot ▶   MAKE WORK FLOW FASTER

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