Request Demo



Customer Success Story – STATE BANK OF INDIA

Creating an Experience-Driven Banking Dominance Through an Integrated Platform Across All Lines of Business

400% Increase in lead conversions and more transformations inside

WHAT WAS SBI BANK LOOKING FOR?

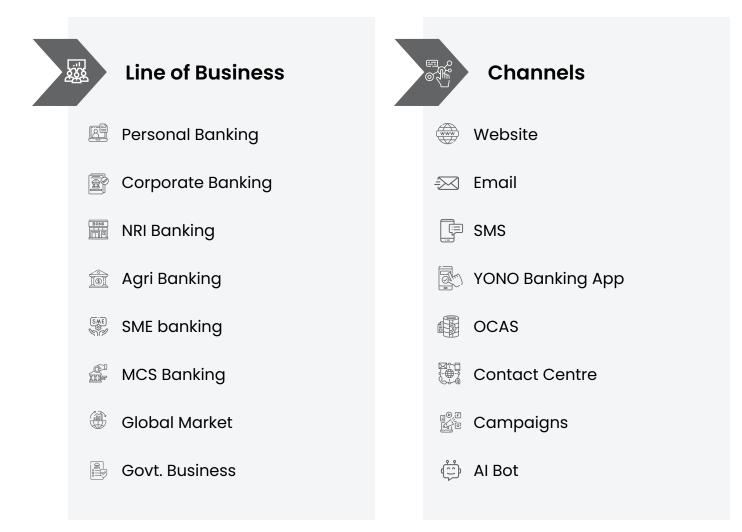
- Sales Acceleration
- Service Modernization
- Smarter Relationship Management
- Holistic Reporting

Marketing Automation

HIGHLIGHTS

Active Users **30,000+** User Concurrency **39+** Integrated Systems

23,000+ Branches 450M+ Customers



RESULTS

400%	Increase in lead conversion rates	90%	Reduction in avg. loan processing time
300%	Increase in credit card lead conversions	20%	QoQ Increase in home loan disbursements
40%	Reduction in avg. sales cycle time		

SOLUTIONS, DELIVERED

Sales Acceleration

- Transforming sales operations by capturing new business from multiple channels across all business lines, including digital lending ,on a unified platform.
- Meticulously integrating different systems such as CIBIL, eKYC, IGMS, UIDAI PAN and more.
- Comprehensive customer intelligence with cross sell offers delivered through Trinity Cross Sell Modeler[™] based on various triggers across all touch points with fast track closure process.
- 100% Automated lead assignment with intelligent allocation rules to various teams including call center, direct sales and branches.
- Users can create plans and set targets based on multiple parameters like no.of accounts, customer mix, product mix, users, territories etc with stakeholders empowered with a real time tracking mechanism that displayed conversions at each stage on a single consolidated screen.
- All features available on mobile app with additional geolocation enabled capabilities like Nearby leads and more.

Service Modernization

- BUSINESSNEXT equips SBI bank with a unified call center and complaint management solution across line of businesses (LOBs).
- A holistic customer 360° view that included interactions, service requests ,product holdings, relationship team hierarchy, etc., provided real-time updates, escalations and complete intelligence on a customer service request.

- Users are empowered with a quick action center with straight through processing for instantly fulfilling service requests.
- Digital journeys have been deployed for all queries, requests and complaints across product lines and across channels.
- SBI Bank users elimate window hopping, paperwork and errors by deploying Straight Through Processes (STPs).
- Corporate memory also aids the bank to avoid effort duplication, thus increasing contact center efficiency.
- Best practices including internal & external SLAs were configured to ensure 100% audit trail, regulatory compliance and delightful customer experience.

Smarter Relationship Management

- Relationship Managers are enabled with algorithmically derived smart day planner that analyses all tasks, meetings and activities based on relevance, urgency, business logic and more.
- Users get real time revenue growth projections across retail, corporate and SME segments.
- RMs can personalize conversations with a conversation striker card that delivers real time signals harvested from customer actions, behavioural insights and more to build deeper, meaningful relationships.
- Automated and context driven playbooks for all sales and service scenarios that automates sequential engagement steps like sending emails, scheduling calls and more.

Marketing Automation

- Real-time campaign performance tracking parameters like number of leads generated, cost per lead, campaign ROI etc.
- Dynamic mailing lists with criteria like age group, income group, territory, channel preference, etc.
- Rich HTML templates to design focused campaigns with the right content and channels depending on the target segment.
- Deeper insight into segmentation and cross-sale capabilities with improved targeting and focused proactive campaigns.
- Designer drive models for intelligent crossselling, along with tracking and synchronizing all leads/ offers/ responses across channels.
- Automated self-buying process with win back modelers to reduce journey drop offs improves customer retention.

Holistic Reporting

- BUSINESSNEXT delivers 100+ drill down, multi-axis, out-ofbox and customizable reports and dashboards with a drag and drop report and dashboard designer, depending on roles and geographies
- Reports are sent in all formats incl.
 HTML, text, pdf with data and graphs to a user's email inbox
- It includes sales reports, service reports, role based dashboards, summary pages and more



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