

Global credit technology company integrates its CRM with Smartflo for superior customer service



Introduction

The customer is an award-winning credit insight and technology company using proprietary data analytics, AI, and technology to address major financial challenges for businesses. It designs and runs managed digital marketplaces for business credit, enabling financiers to make better lending decisions and SMEs to procure affordable credit in minimum time. As a fintech, it operates both within and outside India and has a customised range of over 100 loan products.

Business Challenge

The organisation's contact centre architecture lacked a platform to methodically route calls to available agents and monitor those already interacting with customers.

- Transferring calls between agents and adding supervisors on a conference call was a key challenge.
- In addition, the customer wanted to integrate their contact centre infrastructure with their already existing Zoho CRM. This was required to enable click-to-call service and get all call logs recorded within the CRM software.
- The customer also needed to analyse agent productivity by recording their break durations, average call handling times, and total logged-in hours. Supervisors' access to call records was essential to evaluate performance.

The problem with any legacy contact centre setup is that it depends on multiple technologies involving diverse equipment and hard-wired connections. The cluster is difficult to maintain and scale as per changing customer demands.



Integrating the programs of a traditional contact centre with new tools to support continuous interactions is also a challenge. The consequence is struggling agents and annoyed customers.

The need for a cloud-based telephonic solution originates from such issues – it helps to provide better services in a digital world where people and data are extensively spread out.

TTBS Solution

To address the problems brought by this analogue contact centre setup, TTBS offered its cloud communication suite Smartflo to the customer.

Customising a huge contact centre setup for systematic call distribution and integrating it with a CRM system was difficult but successfully implemented with TTBS Smartflo. With efficient call routing and stronger data privacy, the client now has a more productive team and happier customers, proving that TTBS Smartflo is the perfect solution to the clients' complex problems.

The solution made remote workforce management simple and efficient as the company could centrally and randomly route calls to available agents. The department routing the calls also maintained a waiting queue with a timeout of 300 seconds.

While deploying Smartflo, the TTBS team ensured that it integrated well with the company's Zoho CRM. This helped to resolve the issue of toggling between tools to make outbound calls to customers.

The agents could now use a unified platform to manage their leads and contacts, save customer data, access their transaction details and interactions with the company, and set follow-up reminders. It also simplified the escalation of issues to supervisors and managing CTI pop-ups.



Benefits



Enhanced agent productivity with quick access to customer details



Efficient and first-call resolution of customers' concerns



Effective routing of calls to avoid excessive idle time and stress for other agents



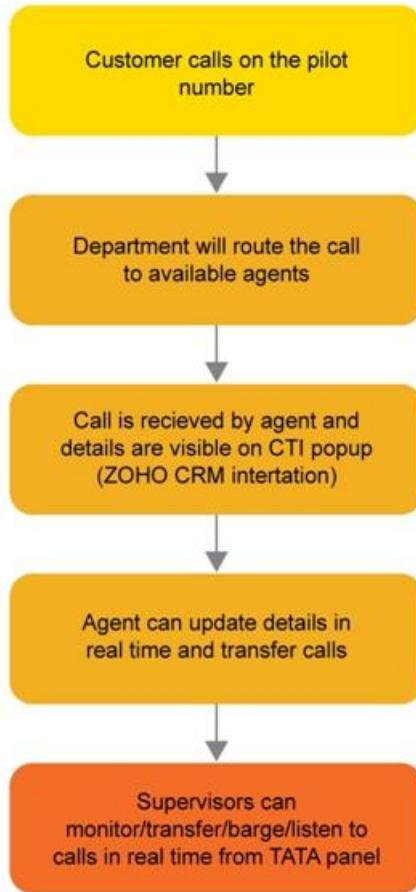
Updating of leads in real-time with comprehensive call records



Assured data privacy for agents and customers



Consistent monitoring of agents' performance



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