



70 Cities, 150 Offices, 1 Goal: Business Digitalization

Digitalizing end-to-end customer experience is a major challenge, especially when you're a financial giant with an extensive nationwide customer base. So, when our client wanted to create a next-generation digital experience ecosystem and outmatch the competition as a new-age financial leader, we turned a strategic eye towards their transformation and helped them achieve success.

Snapshot

Challenge: Manual customer service processes; non-responsive UI; no market insights

Solutions: Deployed an integrated digital experience platform to facilitate buying and selling of financial products; implemented an intuitive UI for seamless navigation; enabled a digital advisory platform to provide market insights

Benefits: Digitalized customer experience; optimized navigation; improved business analysis and planning

Key Challenges

1. With the threat of business disruption, most financial services companies are digitalizing their customer service. Our client was no exception. Their legacy system constraints and cumbersome manual processes hindered their ability to create on-demand, digital service experiences. Since many functions had to be performed linearly, turnaround times were long, which led to poor service standards.
2. The user interface was non-intuitive and difficult to navigate. Users weren't able to find relevant information quickly, which negatively impacted the site's usability.
3. Our client was having a difficult time meeting the rapidly changing market demands and satisfying their customers' evolving habits and preferences. Their lack of market insights forced them to make ill-informed business decisions based primarily on instincts and hampered their ability to help their customers achieve their financial goals.



Our Solution

Our client wanted to 'reinvent' their customer journeys and processes. Because the stakes were high, they required a digital transformation specialist with a strong legacy of innovation. We began by carefully analyzing their end-to-end processes, defining their workflows, and creating a comprehensive digitalization roadmap, focused on customer-centricity, design thinking, and frugal engineering. Our experts built and deployed a highly scalable and integrated financial system from scratch that offered their complete portfolio of services via a single touchpoint, saving both time and money. This platform also served as a starting point for automated customer service processes, resulting in increased efficiency, speed-to-market, and superior customer experiences.

We implemented an intuitive graphical user interface to help users seamlessly navigate through the website and access relevant content easily. Limited use of menus, systematic distribution of content, and clear call-to-action contributed to the site's high customer experience ratings and improved customer satisfaction. This resulted in increased customer retention and paved the way for new revenue opportunities.

We built a high-performance digital advisory system—powered by the transformative value of Artificial Intelligence (AI) and Machine Learning (ML) algorithms—to transform our client into a modern enterprise. This system was instrumental in consolidating customer data and extracting value to uncover key insights, helping the client define user personas and deliver hyper-relevant experiences at scale.

Our client is a premier financial and investment services company, founded in 1964. With over 50 years of industry experience and a business footprint spanning over 70 cities, the company helps people grow and protect their wealth and strives to maintain meaningful customer relationships.

Business Benefits

- Inspired a digitalized and integrated customer service model
- Created new operational and cost efficiencies
- Accelerated time-to-market and unlocked new sales opportunities
- Improved customer experience
- Ensured on-demand services to meet changing user preferences

We can't wait to tell you more

Whatever business you're in, whatever problem you have, we have the experience and together we can create a solution. All you have to do is contact us when you're ready to experience...

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