

CUSTOMER RELATIONSHIP MANAGEMENT

EFFECTIVELY MANAGE CUSTOMER RELATIONSHIPS &
ORGANIZE SALES AND CUSTOMER SERVICE PROCESSES

DQ CRM

MARKET REQUIREMENTS

DIGITAL TRANSFORMATION

The classic CRM system becomes a center around which companies implement complex service processes, document management, and comprehensive analytics

NEW REQUIREMENTS TO CRM

The growing number and diversity of internal and external digital services increase demand for high performance and flexibility of CRM systems

SOLUTION OVERVIEW

Manage customer relationships and organize sales and service processes

The solution meets requirements of businesses of any size



Management of the customer lifecycle, registration of customer data, customer segmentation



Planning and management of sales, setting goals, management of sales funnels



Management of presale projects, registration of presale project stages and activities



Planning and management of marketing programs; registration and segmentation of leads



Lead management, lead quality and conversion management



Automation of processes for the selection and sale of products



Analysis of sales and efficiency of communications

COMPREHENSIVE APPROACH TO CUSTOMER AND LEAD MANAGEMENT

01

PARTY REGISTER

Centralized storage and processing of customer data and data of any other participants of processes

02

MARKETING MANAGEMENT

Management of marketing campaign and programs
Setting marketing goals and monitoring results of marketing campaign and programs

03

SALES MANAGEMENT

Management of sales processes:

- Setting goals for sales and activities (contacts)
- Decomposition of goals by business area, product, customer and segment
- Collection of data on completed sales and contacts, calculation of sales KPIs
- Analytics

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CUSTOMER SERVICES

Organization and streamlining customer service processes:

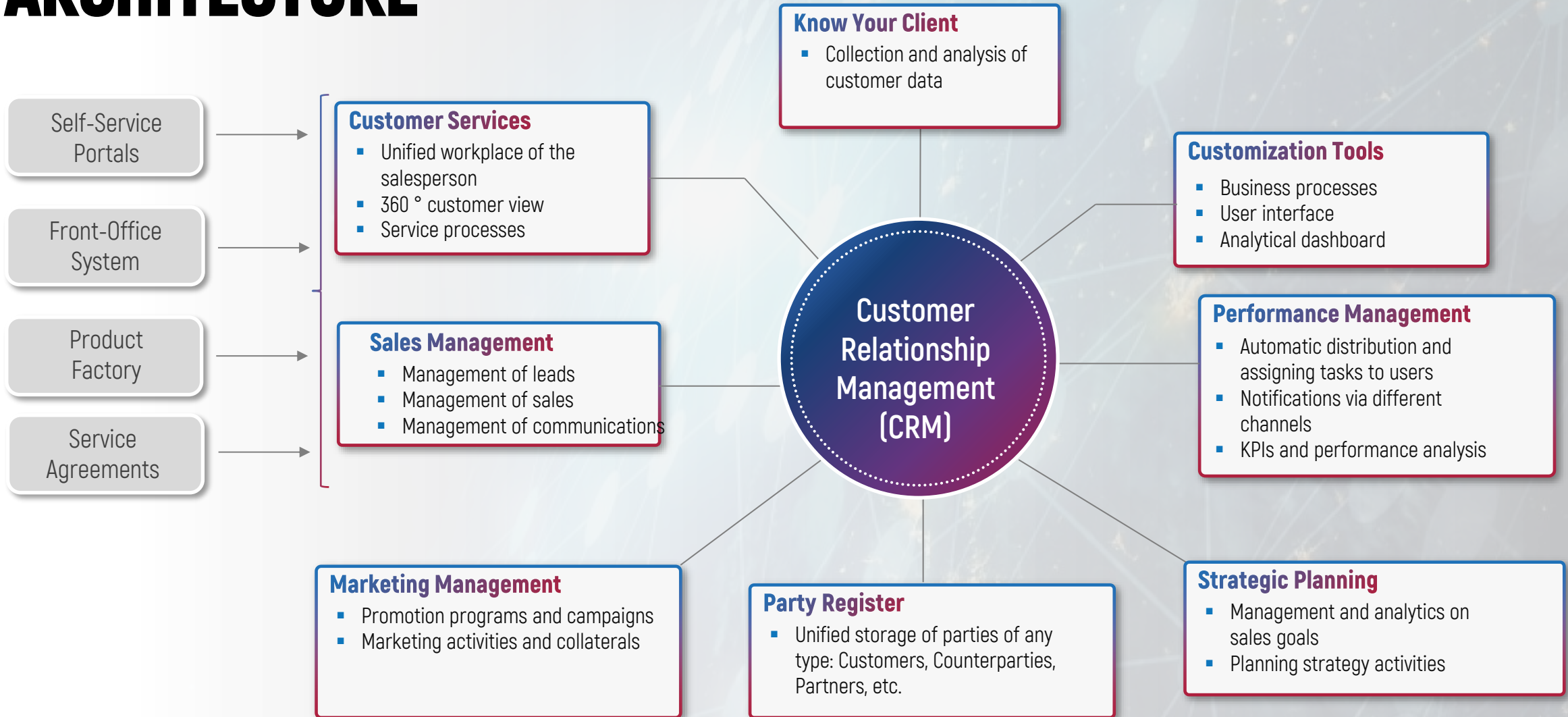
- Management of customer inquiries and contacts
- Monitoring of the customer satisfaction level

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PERFORMANCE MANAGEMENT

- Management of time and tasks of sales and customer service managers
- Analysis of employee performance (both for the manager and the employees)

ARCHITECTURE



PARTY REGISTER

(CRM-Contacts Management)

The Party Management component is designed for centralized storage and processing of customer data

It allows adding new customer types (e.g., counterparty, beneficiary, payer, recipient, etc.)



PARTY REGISTER

Management of the centralized database of all existing and potential customers



LEGAL DOCUMENTS



KYC (KNOW YOUR CLIENT)

Comprehensive verification of customer data, with the ability to connect external cloud services



CUSTOMER PROFILE

Enrichment of the information with data from external customer data services (government services)

MARKETING MANAGEMENT (CRM-MARKETING MANAGEMENT)

Management of marketing campaigns and programs to improve efficiency of marketing efforts and sales results

COLLECTION OF LEADS

Collecting contact details of potential customers, creating and maintaining the lead database to generate personalized offers

SEGMENTATION

Segmentation of leads and customers by a wide array of metrics (age, purchasing power, etc.)

MARKETING ANALYTICS

Generation of reports and dashboards for the analysis of different marketing metrics

MARKETING CAMPAIGNS (PROMOTION PROGRAMS)

Planning of marketing activities (events) based on resources, deadlines and target results

MASSMAIL MANAGEMENT

Creating mass mailings, triggering letters with the help of letter templates (mail contents) and other tools for the notification of existing and potential customers

SALES MANAGEMENT

(CRM-Sales Management)

- Setting goals for sales and activities (contacts)
- Decomposition of goals by business area, product, customer and segment
- Collection of the information on completed sales and contacts, calculation of sales KPIs
- Analytics



SALES PLANNING

Planning sales by different metrics (product, region, manager, business area, etc.)



LEAD MANAGEMENT

Automation of the lead lifecycle starting from the assignment of the account manager to the conversion



SALES FUNNEL

Breaking down the sales process into stages. Selection of the communication tactics for each stage. Defining the conversion percentage, etc.



MANAGEMENT OF PRESALE PROJECTS

Management and monitoring of the status of presale projects: budget, deadlines, etc. Creation and control of presale stages



ANALYTICS

Analytical tools used to evaluate key metrics (conversion, interest, amounts, distribution in the funnel)

CUSTOMER SERVIVING (CRM-CUSTOMER SERVICE)

Organization and streamlining of the customer service process

360° CUSTOMER VIEW

Personalized customer service with the use of the complete customer profile, the list of products and the history of relationships

E-APPLICATIONS

Management of customer orders for the purchase of products or services

ANALYSIS OF THE SERVICE QUALITY

Assessment of the customer satisfaction level and other important service metrics

CUSTOMER INQUIRIES

Processing of customer inquiries received via any channel: via the contact center, by mail, via messengers, chat bots, etc. with the ability to categorize the received inquiries as incidents, requests, complaints, consultations, etc.

COMMUNICATIONS

Tools for interaction with colleagues and customers across various channels using a single user interface

PERFORMANCE MANAGEMENT

(CRM-Time Management)

Efficient time and task management to improve performance and results of sales persons and customer service managers

Planning and assigning tasks, monitoring deadlines, managing priorities



CALENDAR OF DEALS

Planning customer deals according to the calendar, taking into account available and optimal time options. Assigning a location for the deal



USER TASKS

Ability to work in the single user interface providing access to all available tasks



USER NOTIFICATIONS

Management of notification templates, types, channels and groups



ANALYTICS

Assessment of employee performance metrics (e.g. evaluation of the ratio of user activities and workload, the number of overdue tasks, etc.)

UNIQUE ADVANTAGES



FUNCTIONAL FLEXIBILITY

- High expertise in the financial services market
- Support of all popular financial products and transactions



FLEXIBLE CUSTOMIZATION

- Support of standard scalability options
- Support of regulatory requirements



PRE-INTEGRATED SERVICE PROCESSES

- Solution development based on the modern tech stack
- Implementation of continuous end-to-end data processing processes



UNLIMITED SCALABILITY

- Support of multi-thread calculations
- Unlimited scalability due to the microservice architecture

OUR EXPERTISE

SYSTEM INTEGRATION & DELIVERY OF THE LEADING GLOBAL SOLUTIONS IN ASIA PACIFIC

GLOBAL BEST PRACTICES, SOLUTIONS & TECHNOLOGY FOR THE FINANCIAL SERVICES INDUSTRY

VAST EXPERIENCE IN RETAIL, CORPORATE AND BUSINESS BANKING

COMPLEX DIGITAL TRANSFORMATION PROJECTS

CUTTING-EDGE FINANCIAL TECHNOLOGY

THANK YOU

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