

# How Direction Software LLP helped Barclays India enhance it's customer services with Microsoft CRM Solution



## Microsoft Dynamics Customer Solution Case Study

For more information contact:

+ 91 (22) 6152 5000 | [info@direction.biz](mailto:info@direction.biz) | [www.direction.biz](http://www.direction.biz)



**DIRECTION**  
Software LLP



For over 300 years, global financial services major Barclays has incessantly focussed on customer-driven initiatives and set new standards of excellence. With an aim to widen its footprint in India, Barclays launched its global retail and commercial banking division in the country. From large Indian multinationals and public sector firms to small and medium enterprises, the corporate banking division that began its operation in November 2006, services a variety of clients. It offers its clients a broad spectrum of services including loans, deposits, payments and cash management services, trade finance and treasury solutions.

Launched in May 2007, the consumer banking services offer a portfolio of innovative products that help Barclays's customers gain better control over their finances - ultimately enabling them to achieve their financial goals faster. The offering includes innovative proposition such as personal loans that come with smaller monthly repayments and credit cards that allow customers to choose their payment date. Barclays constantly strives to create a unique customer experience with its offerings.

For more information contact:

+ 91 (22) 6152 5000 | [info@direction.biz](mailto:info@direction.biz) | [www.direction.biz](http://www.direction.biz)



**DIRECTION**  
Software LLP

# The Need for a Holistic Solution

Barclays India strongly needed a robust and scalable Customer Relationship Management (CRM) solution to effectively serve its customers. Lack of an integrated customer-focused framework made it challenging for the firm to streamline processes and drive business growth. The firm's prime challenges included:

## Lack of a 360-degree view of the customer:

It's imperative to have a holistic information about the customer to drive better engagement. Absence of an integrated customer-focused solution at Barclays India resulted in long lead times for service delivery. The firm was not able to capture the queries, complaints or requests that came from customers. Identification and verification of customers consumed a lot of time.

## Inability to handle multiple customer service requirements:

Absence of a consolidated and centralized repository system to meet varied customer needs added to the company's complexities. Manual systems (excel sheets) were not integrated with the IVR systems. Apart from the core banking solutions Flexcube and Prime, there was no other system to handle multiple customer service requirements. Also, none of the prevalent systems offered an end-to-end solution which included the process of initial login, automatic routing to resolution units and ultimately an update on the final resolution update.

More importantly, the Client Facing Services (CFS) team was battling to tackle customer queries and complaints due to lack of a single and unified screen. Also, the existing core banking systems took an average of 10 minutes to handle a single customer query. Due to lack of integration in core banking systems, Barclays India was increasingly finding it difficult to respond to customer queries on time, gain access to customer history and capitalize on customer interactions at one go.

## Inability to track employees' performance:

Lack of a comprehensive CRM solution made it challenging for Barclays to track its employees' performance and stay up to speed with the current business requirements.

## Decreased productivity:

Lack of streamlined business processes at Barclays India gave way to multiple errors, inconsistency, increased back-end service support unit dependency. The result: Decrease in the company's productivity and profitability.



For more information contact:

+ 91 (22) 6152 5000 | [info@direction.biz](mailto:info@direction.biz) | [www.direction.biz](http://www.direction.biz)



**DIRECTION**  
Software LLP



## The Solution: How Direction Software LLP Helped Barclays to Embark on a CRM Initiative

Delivering exceptional customer experience has been the firm's key to success. In order to continue fostering this reputation, Barclays India sought a customer relationship management solution that would streamline their business processes and provide a single, integrated view of customers' data, queries and responses. With the deployment project targeting nearly 800 agents and support staff, the Barclays India development team wanted a holistic program that would meet the ever-changing demands of customers.

The firm considered several CRM programs before making the final decision to implement Microsoft Dynamics™ CRM. The program team chose to implement Microsoft Dynamics CRM for its flexibility, adaptability and affordability.

Though the implementation process was managed by Microsoft Services, Barclays India was looking for a partner who could manage the overall system integration and customization. For this very reason, the company sought help of Direction Software LLP which is known for its extensive domain knowledge in the CRM arena.

### What the New CRM Solution Provided?

Here's a lowdown on the CRM features that helped Barclays India streamline their customer service functions:

#### **A single repository for all customer queries, requests and complaints:**

The solution generates unique reference for each customer interaction and prevents data duplication in terms of customer requests or complaints. The solution also shows history trails for earlier contacts, requests and complaints and this helps the customer care team to effectively interact with customers.

For more information contact:

+ 91 (22) 6152 5000 | [info@direction.biz](mailto:info@direction.biz) | [www.direction.biz](http://www.direction.biz)

### Generation of MIS reports and SLA tracking:

The system supports an inbuilt Service-Level Agreement (SLA) tracking mechanism query-wise and product-wise. The system automatically sends out escalation mails to higher authorities in case the SLA is breached. Basic MIS reports on contact volumes are automatically generated and delivered to the configured mail boxes. The system also supports an automated audit trail for specific tasks which results in better monitoring and tracking of service personnel. The result: Less paper work for financial related transactions.

### Interface with various core banking systems:

The solution provides the much needed single view of the customer's information. This information is pulled from various core banking systems like Flexcube (Retail / Corporate / Net banking) and Prime in simple / fewer number of screens to the front end service personnel. The solution provides an interface with these core banking systems and gives a detailed insight about the customers.

### Auto execution and routing of requests:

The system helps to combat customer related discrepancies and provides additional information prior to logging in the request or complaint. The system automatically routes requests and complaints to the respective e-solution units where direct execution on core banking systems is not feasible. This is done through a configurable matrix defined in the CRM system.

## About Direction

We are a software services firm, specializing in developing and implementing Internet strategies for businesses & providing high-end software development services including Custom Programming & Offshore Development.

With 17,000 sq. ft. of space in a modern building in central Mumbai the hub of all business activities in Mumbai, Direction is fully equipped with state of the art infrastructure and networked with redundant 6 MBPS dedicated internet access from different providers.

Our vision is to be a trusted IT partner, leveraging our knowledge of tools and technologies to provide simple, integrated and innovative solutions that result in maximum customer satisfaction.

## The Result: A Bagful of Benefits

- With Direction Software LLP bringing in its proven expertise and industry experience to the partnership, Barclays India is awash with a lot of benefits. Some of them are:
- The new CRM system enables Barclays India to manage its existing as well as potential customers, sales opportunities and cash flows more effectively. As a result, customer satisfaction levels have improved significantly.
- The service delivery team at Barclays can now obtain customer information instantly in a single and integrated page view rather than having to collate data from multiple systems.
- The comprehensive system is now able to capture the queries, complaints or requests from customers across various channels such as e-mails, walk-ins, phone banking etc. Today, the CFS team is able to verify the customer without the use of the existing core banking system.
- The system provides the capability to automatically manage SLA's through notifications and reminders. This ensures acceptable service levels are met.
- The new system enables controlled tracking and auto escalation of cases.
- The implementation has facilitated improved traction, processes, customer engagement as well as enhanced Barclays India's ability to cross-sell its solutions.

For more information contact:

+ 91 (22) 6152 5000 | [info@direction.biz](mailto:info@direction.biz) | [www.direction.biz](http://www.direction.biz)



**DIRECTION**  
Software LLP