

MS Dynamics CRM with CCA Integration for Geojit BNP Paribas



PositiveEdge helps Geojit, a leader in Indian Capital Market, implement Microsoft Dynamics CRM CCA to manage their Sales, Marketing and Customer Service

CUSTOMER

Geojit BNP Paribas today is a leading retail financial services company in India with a growing presence in the Middle East. The company rides on its rich experience in the capital market to offer its clients a wide portfolio of savings and investment solutions. The gamut of value-added products and services offered ranges from equities and derivatives to Mutual Funds, Life & General Insurance and third party Fixed Deposits. The needs of over 633,000 clients are met via multichannel services - a countrywide network of over 546 offices, phone service, dedicated Customer Care Centre and the Internet.

BUSINESS SITUATION

Geojit BNB Paribas required a system to manage their Sales, Marketing and Customer Service which would enable each of these business areas to optimize their operations and increase productivity. The system would also need to serve as an interface across these business areas ensuring transparency of information across all levels.

SOLUTION

PositiveEdge proposed and assisted Geojit BNB Paribas toward implementing Microsoft Dynamics CRM CCA 2011 to manage their Sales, Marketing and Customer Service to provide as an interface amongst their different business users.

A Unified Desktop System was implemented for dealers and customer service agents who dealt with trading. The system was built using the Customer Care Accelerator of Microsoft Dynamics CRM2011. As part of the Unified Desktop, PositiveEdge integrated Microsoft CRM CCA 2011 with Avaya CTI for telephony call related information.

Claims based authentication was implemented as part of the solution to enable Novell eDirectory users to access Microsoft Dynamics CRM CCA.

BENEFITS

The implemented Microsoft Dynamics CRM CCA 2011 solution enabled integration of Avaya CTI with CRM. This facilitated Dealers and Customer Care Agents to better interact with customers by using the readily available information from the CRM system during live calls.

The Implemented CRM System complements Geojit BNB Paribas's existing products as it interfaces with their existing systems to provide a unified view.

NEXT STEPS

Contact us to discuss how we can help with your business needs.

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Engagement Highlights:

- ✓ Novell eDirectory Integration
- ✓ Avaya CTI integration
- ✓ Interactive Voice Recording
- ✓ Unified Desktop for Dealers and Customer Care
- ✓ 360 degree view

Platform: Microsoft Dynamics CRM CCA 2011

Tools and Technology used

- ✓ Microsoft Dynamics CRM
- ✓ Microsoft .NET
- ✓ SQL Server
- ✓ SQL Server Reporting Services
- ✓ Microsoft Visual Studio 2010

Results:

- ✓ Unified Desktop System with Avaya CTI integration
- ✓ Campaign Management
- ✓ Customer Services Management
- ✓ Dealer Dashboard