

LETTER TO ALL BRANCHES/OFFICES IN INDIA

ISSUED BY RETAIL LIABILITIES DEPT, BCC, MUMBAI

Dear Sir/ Ma'am

Sub: Rollout of Mobile App "CRM@Mobile" for all the Staff members of the Bank

It is the prime focus of our Bank to increase the customer base & business by acquiring new customers and cross selling our products to existing customers. Additionally, Bank is envisaging on growth by providing Customer Services at doorstep resulting in enhanced Customer Experience.

Currently, whenever Marketing/Sales/branch Officials are visiting any existing or prospective customer during various business initiatives/campaigns, they are not in a position to view existing customer profile & capture leads in real time (both Existing & new to bank customer). Creating the leads after reaching the branch results in delay and low customer satisfaction level. Many times, this delay results in non-conversion of warm leads due to lack of proper monitoring system.

To address this issue, Bank has come up with a new Mobile App i.e "CRM@Mobile", to enable the bank staff to serve customer & generate leads on real time basis at any time – anywhere. This is a state-of-the-art app that allows Field Functionaries to seamlessly enter and track leads. This app simplifies the process of recording new customer prospects and referrals. It provides a user-friendly interface, making it easier for field functionaries to stay organized and efficient in their efforts. Bank staff can access the App in their Android/IOS mobiles using Domain ID and Password, validated through OTP. They can view minimum profile information of existing customer viz. Customer segmentation. Staff can create leads of NTB prospective customers also by capturing the basic details. App has the capability to capture the interaction and appointment can also be scheduled at future date with the customers.

CRM@Mobile Application is integrated with SIEBEL CRM Application for further flow of the leads to Branch/Contact center for contacting the customer and opening of accounts/ cross selling of products and updation of Lead status. Leads registered through CRM@Mobile App can be monitored by Branches/Business verticals. SMS/e-mails will be sent to all stake holders on daily basis on outstanding open leads. Additionally, pending leads will be reflected to branch, Region, Zone for necessary action.

Objectives:

- To give Field Teams, ability to communicate with customers and prospects on the go, capture their needs & leads, access basic data any time to enhance the efficiency and effectiveness of branch staff.
- To have CRM on Mobile app, which is an extension of the existing Siebel CRM application, albeit with limited functionalities
- To help in providing different services at door step of customer and even ON the GO.
- Facilitating each staff to transform into service with sales model having Quick snip on customer's info (segment, demo-graphics etc.), Snippet of product holdings & opportunities for the client etc.
- To help in understanding customer needs and capture customer interaction for future follow up.
- To enable the user to provide quick and efficient service to customers, leading to improved customer satisfaction.

- By implementing the CRM@Mobile app, we aim to improve our customer service capabilities, increase lead generation efficiency and empower our staff to engage with customers in a more personalized and informed manner.

Features of Mobile App:

- App can be used on Android/iOS mobiles
- Secured Access with Domain ID & Password
- 2nd Factor Authentication for Login through OTP on Registered Mobile Number as per HRMS and validation
- Generate lead for ETB as well as NTB
- View profile of existing customer of the Bank, snip on value of existing relationship
- Create Lead for NTB by capturing basic details
- Obtain Customer consent for lead creation digitally
- Real time integration with existing Siebel CRM for lead registration
- Lead Id is visible to the User for sharing with prospect on real time, apart from SMS & E-mail to customer/prospect
- Real time tracking of the lead for further course of action and to act for early conversion

Process Flow:

CRM@MOBILE Application can be downloaded from the link <https://acrm.bankofbaroda.in>

- Officer will login in Mobile @CRM with Domain ID and Password
- Validate through OTP delivered on RMN as per HRMS.
- Selection of existing and new-to-bank (ETB and NTB) customers.
- View ETB Customer profile
- Customer requirement
- Capture Lead for different products
- Obtain and record the consent from customer/prospect through SMS authentication
- Submission of Lead in CRM
- Track the real time Status of the lead captured
- Closure of the Lead, in case the prospective customer is not interested at any point time

In order to motivate the field functionaries for actively using Mobile@CRM app for capturing the leads, we are announcing the launch of a dynamic and ambitious campaign that aims to giving the opportunity for our staff members to excel and gain recognition through our newly created portal. The campaign aims at creating maximum numbers of convertible CASA leads by the field functionaries.

The top performing Barodians creating maximum converted Leads through CRM@Mobile will be awarded with the **Badges** as per a new recognition concept which will be implemented soon.

Accounts with monthly Average balances of more than ₹25000 will be considered for eligibility for Badges. These badges will be a symbol of honor for our exemplary performing staff by offering special recognition within the bank.

Recognition:

The Staff Members awarded with Performer Badges will be eligible for various recognition, mention in Gems/Personal profile, opportunities for career growth, and access to exclusive events. Furthermore, their dedication and achievements will be prominently recognized in our internal and external communications, demonstrating our appreciation for commitment of top Achievers of the Campaign.

We believe that this campaign is not only an excellent opportunity to excel but also a chance to actively contribute to our bank's continued success. Your involvement can make a significant impact, and we look forward to seeing how our entire team will come together to achieve our collective goals.

We encourage each and every one of the staff members to participate actively in this campaign and utilize the new portal to its full potential. Let us work collaboratively to strengthen our bank's position in the market.

Regards,



(Joydeep Dutta Roy)
Executive Director



Encl : as above