

Optimizing customer operations for a major financial services provider

Transforming inbound and outbound operations with cloud-based automation and CRM integration



Case Study Overview

Problem

Kotak Securities needed a solution to streamline their inbound and outbound operations, replacing their existing system with a cloud-based, integrated platform. They aimed to improve customer experience, reduce manual intervention, and boost operational efficiency.



About the Client

Kotak Securities is a leading stockbroker in India, managing a large customer base for over 25 years. They provide financial and brokerage services across a diverse range of clients.

Approach

- **Self-Service IVR:** Enabled 75% of customer calls to be managed automatically, without the need for agent intervention.
- **K-Sec CRM Integration:** Seamless synchronization with Kotak Securities' CRM system (Salesforce), enabling efficient handling of client data, call replication, and streamlined workflows.
- **Real-Time Analytics & Reports:** Continuous monitoring and performance tracking for better decision-making and operational efficiency.
- **99.99% Uptime:** Provided a reliable, 24/7 cloud-based platform that ensured seamless communication and uninterrupted service.

Solution

- Deployed HALO Connect, a cloud contact center with integrated CRM capabilities, to optimize customer interactions.
- Enhanced both inbound and outbound communication through automation and real-time data management.
- Significantly improved operational workflows and boosted customer satisfaction.