

**Briskon** TRANSFORM WITH AGILITY

CASE STUDY

# Customized Customer Relationship Management for a reputed Financial Company

## The Client

24 years old, one of the leading financial services company in India with more than 80,000 customers



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## Business Situation

The client was using a manual process to maintain the records of their customers and sales & marketing activities. Due to increased number of customers and sales volume, client started facing problem with the existing number of personnel with manual system. Client approached Briskon for a new cost effective online system.

## The Challenges

Understanding all the processes while communicating to all departments and creating a roadmap such that all users get benefits with new system. The system must serve sales pipeline, cross marketing, customers with single online application. The system has to be highly scalable and robust to accommodate additional functionalities and features.

## The Solution

Briskon developed an internet based centralized robust application providing automated functionalities pertaining to sales automation, customers, proposal & invoice generation, cross marketing, emailing etc.

### Important features captured with solution:

- User profile maintenance
- Sales pipeline details
- Lost pipeline details
- Account management
- Customer details
- Proposal & invoice generation
- Online calendar
- Cross marketing
- Email
- Mail labeling
- Online knowledge bank

## The Benefits

- Centralized database connecting all the stakeholders
- Ease of work
- Clear visibility of sales
- Quick Quotation generation using pre defined templates
- Efficient communication with customers
- Handling large number of customers
- Handling customers better with designated account managers

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## About Briskon

Founded in 2005, Briskon is a global software application development, mobile apps development, digital transformation and web solutions company operates from Bangalore and USA.

Briskon is a highly process driven organization with extensive experience of working with great companies. The young and vibrant team of Briskon consists of highly skilled managers, analysts, designers, developers and QA personnel, working together to deliver world-class quality products and solutions. Our unerring commitment to quality and continuous learning to stay abreast of the latest technologies enables us to consistently deliver customer delight.

Our approach extends our innovative technological capabilities to service clients across all major domains. Briskon's solutions expand to cover the entire spectrum of IT, software products, digital transformation, digital marketing and professional services. In order to serve our clients more efficiently, Briskon has split its strategic business units into 3 distinct focus areas:

Solutions Engineering Group (SEG)  
Professional Services Group (PSG)  
Offshore Services & Support (OSS)

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**Contact us today for your IT needs and demo on our solutions**

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