

## LEVERAGE A 360° CUSTOMER VIEW FOR ENHANCED CROSS-SELLING

Wipro improves the sales productivity and collaboration for 17 business units of a large multinational bank by moving 1000+ users to Salesforce CRM”



## INDUSTRY LANDSCAPE

Financial institutions, historically, have not taken a comprehensive approach to customer management and service, often creating offerings that are tailored more to their strategy rather than the customer’s needs. Today, banks recognize that to be competitive they must react to individual customer requirements for flexible, customized services and products that can be accessed through multiple channels.

Banking enterprises are looking to adopt technologies such as Cloud CRM that enable a comprehensive view of the customer, helping them easily identify high-value customers and target them specifically. Established players realize that with these solutions they can ensure a consistent customer experience across all channels.

## CLIENT BACKGROUND

The client is a large US-based multinational banking and financial services holding company which generates between \$3 and \$4 billion per year in investment banking revenues. The client has over 9,000 retail branches and 20 business units catering to different financial products and over 70 million customers worldwide.

## OPPORTUNITY

The client had different business units using different CRM tools and processes. They lacked a single, accurate view of the customer and users had to switch between multiple legacy applications for reporting and deal management. The client needed a single CRM platform that would enhance the collaboration between shared account teams, help them leverage, upsell and cross-sell opportunities and enable secure and selective customer data access.

*The engagement led to a reduction in the ongoing cost of maintaining multiple CRM and legacy applications, and greatly enhanced sales productivity.*

## SOLUTION

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Wipro driven sales process transformation for 17 client business units is being delivered in five phases, moving 1000+ users to the new Salesforce CRM. Wipro is working jointly with the client for this agile implementation. Solution highlights include:

- Customer 360° view through integration with existing systems, giving selective visibility to account teams
- Single data repository for multiple legacy applications enabling unified reporting
- “Lead to Opportunity to Quote” implementation with different sales processes for different sales teams
- Google News feed and Google Mashups for latest information and location of customers
- Implemented AppExchange Find Nearby application for finding contacts and Ipreo (marketing intelligence in Global Capital Markets)
- Created new custom modules such as ‘Reverse Repo Management’ and ‘Syndicate Deals Management’

## BUSINESS IMPACT

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The engagement brings various business units onto the same CRM application leading to a reduction in the ongoing cost of maintaining multiple CRM and legacy applications.

- **Reduced lead time** - for information finding and responding to the customers with a 360° customer view
- **Improved cross-selling and collaboration** - between multiple teams through Chatter
- **Enhanced sales productivity** - through a strong mobile platform incorporating high usability
- **Better management visibility and tracking** of all client touch points
- **Increased forecasting accuracy** of potential revenue opportunities

## About Wipro’s Salesforce.com Practice

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Wipro has been a global salesforce.com partner for over 7 years, and has extensive experience in consulting and implementing business critical enterprise-wide solutions for its customers. Leveraging deep industry expertise, process capabilities, and cloud proficiency, Wipro has successfully delivered over 200 enterprise-class process transformation engagements, across industry verticals and geographies. Wipro has one of the largest pools of Salesforce experts supported by a dedicated Center of Excellence that focuses on developing innovative solutions, optimizing delivery frameworks, and enhancing user experience, to realize your ‘Customer Company’ vision.

## About Wipro Ltd.

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Wipro Ltd. (NYSE:WIT) is a leading Information Technology, Consulting and Outsourcing company that delivers solutions, to enable its clients do business better. Wipro delivers winning business outcomes through its deep industry experience and a 360 degree view of "Business through Technology" - helping clients create successful and adaptive businesses. A company recognized globally for its comprehensive portfolio of services, a practitioner's approach to delivering innovation and an organization wide commitment to sustainability, Wipro has a workforce of 140,000 serving clients across 57 countries.

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