



# FieldEZ

for BFSI



# Overview

The Indian banking, financial services and insurance (BFSI) industry has entered an era of 'digital transformation'. In an increasingly competitive environment, financial organizations find that customers not only expect personalized and relevant products, but a convenient and quality experience as well. Added to this are the evolving regulations and the expanding roles of oversight bodies, which demand cohesive and flawless on-ground execution and leave little or no room for mistakes.

BFSI organizations find that they must be agile and responsive to meet these regulatory and customer demands by capitalizing on the strong connection between modern core banking systems and customer touch points. Knowing more about customers is not just important for doing good business but also for monitoring and ensuring asset quality, ensuring compliance and ultimately good governance. Internal stakeholders like business heads, sales managers and field sales executives need real-time access to critical customer information to make smarter and more informed decisions on the go.

FieldEZ helps BFSI organizations automate critical operations to improve customer acquisition and on-boarding, customer profiling and targeting by gathering accurate and reliable field intelligence and making field intensive back-office functions highly efficient.



## About FieldEZ for Banking

FieldEZ offers a mobile on-demand field workforce automation solution configured for the BFSI industry. With FieldEZ, your field sales force can make the most of every sales opportunity by accessing critical information to educate potential customers, simplifying customer on-boarding and delivering a superior customer experience. This easy to use, intuitively designed solution can align the right field sales agent with a customer requirement based on skill mapping to improve the overall lead management and customer acquisition process.

### *With FieldEZ for Banking, field sales agents can:*

- Obtain leads from various lead generation sources such as websites or telemarketing on their mobile phones
- Create leads and provide visibility to management on lead pursuit
- Update lead status on-the-go
- Reduce time-consuming work of filling up daily activity reports manually
- Plan travel time to customer locations efficiently
- Attach relevant information to each lead, including documents
- Instantly capture customer feedback

### *With FieldEZ for Banking, field sales managers can:*

- Ensure optimal allocation of leads to field sales agents
- Define structured process workflows to make lead status reporting more efficient
- Gain instant visibility on open leads, lead conversion rates, average time to convert and other key metrics across geographies and customer segments
- Improve allocation of resources using valuable field intelligence

# FieldEZ

## Service Features for Banking

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**Configurable Processes:** This enables automation of your business processes ensuring seamless integration with field users and flawless execution of sales.

**Attendance:** Field personnel can record their attendance and location.

**Travel Distance:** For each user, the total distance travelled during the day is captured. Along with this, the distance travelled at regular intervals is also captured.

**Lead Management:** Field personnel can update lead information or provide a status on the go. Managers get real-time data on these updates.

**Reports and Analytics:** FieldEZ's solution provides custom reports based on your BFSI organization's needs.

**Alerts and Notifications (E-mail and SMS):** Notifications can be sent automatically at predetermined points during your sales process. These notifications can even use the information that is being captured on the field.

## Feature List

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- Lead Ticket Management
- Configurable Processes
- Configurable Forms
- Scheduling and Dispatch
- Calendar Management
- Email / SMS Broadcasts
- Reporting & Analytics
- Workforce Territory Management
- Alerts and Notifications
- Connect to ERP/CRM
- Location Tracking
- Attendance Management
- Bulk Lead Management
- Rich User Management Capabilities
- Role-based Access Control
- Product/Spare Catalog
- Partner Management
- Bluetooth Printing
- Credit Card Payment Collection
- Bio-metric Scanning



# Benefits

## Improve sales efficiency and productivity



FieldEZ's solution enables end-to-end planning and tracking of lead generation, cross-sell and up-sell activities, streamlining processes, customer acquisition and customer on-boarding. The highly configurable and flexible workflows ensure that the sales process can be constantly tuned to strike the right balance between selling and ensuring compliance. FieldEZ can readily integrate with third-party software and hardware including CRM systems, compact scanners and those that offer paper to digital form conversion. This can significantly reduce application processing time without compromising on necessary paperwork

## Gather real-time information from the field



Management can gain actionable business intelligence and insights in the form of real-time updates from the mobile devices of distributed sales teams, right up to the last-mile. FieldEZ has helped a leading Indian bank improve lead conversion from 9 percent to 32 percent by providing accurate and actionable business intelligence around revenue generation activities, while eliminating manually intensive work involved in providing such visibility.

## Build a high-quality customer base



Accurate customer profiling and product targeting ensures greater asset quality. FieldEZ enables customer profiling data to be gathered at the right stage of the selling process, allowing BFSI representatives to pitch the right set of products to the right customers. BFSI organizations can leverage FieldEZ's capabilities to map catchment areas and plan their sales activities for maximum efficiency.

## Facilitate enterprise-wide collaboration



With regulatory, process and product information disseminated to the distributed work force on their mobile devices, timely feedback from the field is used to fine-tune the decision-making process. FieldEZ's message board feature enables meaningful formal and informal interactions, be it in the context of business, human resource policies, or security policies, resulting in a high-performing workforce.

## Improve customer engagement and satisfaction



By ensuring that important customer touch points deliver the best experience, FieldEZ enables proper knowledge and information dissemination to the sales force. This helps them evaluate their performance against organizational benchmarks. With easy access to the organization's training resources, field sales personnel can improve and educate themselves on changing customer and industry requirements, resulting in a more relevant quality sales experience for the customer.

## Ensure effective asset management



FieldEZ enables better asset management through automation of loan approval processes and tracking the end use of disbursements. For instance, bank representatives can use FieldEZ to capture relevant data for various asset classes (such as housing or agricultural loans) that are critical to loan approval. Representatives can also track the progress of housing, infrastructure and other projects ensuring effective deployment of loan disbursements toward monitoring asset quality.

# The FieldEZ Advantage



First mobile field force management solution to work in an **online** or **offline** mode eliminating the dependency on a live data connection



It is **highly configurable**, so you can model the sales process to suit your organization's processes that require specific workflows, forms and data



We have configured our field force management solution for **over three industries** including:

- BFSI
- After Sales Services
- Staffing Companies



Our solution's **intuitive design** makes it easy to use, which means that your workforce requires no training to use it



Our solution is **platform independent** as it works across iOS, Android and Windows devices ranging from common low-end Java phones to smartphones



As a partner, you are assured of **rapid implementation** and quick time-to-market



*FieldEZ is one of the first mobile field force management applications to work in an online or offline mode across iOS, Android and Windows devices*



## About FieldEZ

FieldEZ offers on-demand mobile field force management solutions that can help you monitor field executive performance, track valuable customer information and respond quickly to changing customer requirements. Our cloud-based mobile workforce management solution helps you leverage real time information from the field to get the best insights into your business operations and customer satisfaction. We work with organizations across industries including banks, hardware and white goods servicing and in-home care services to deliver highly customizable solutions to streamline field force processes and deliver high quality experiences to their end-customers.

### To know more:

Visit [www.fieldez.com](http://www.fieldez.com), call a sales representative on +91 90043 84160 (India) or write to us at [sales@fieldez.com](mailto:sales@fieldez.com)

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