STATE BANK OF INDIA, UK

CASE STUDY

CUSTOMER DETAILS

State Bank of India (SBI), with a 200 year history, is the largest commercial bank in India in terms of assets, deposits, profits, branches, customers and employees. The Government of India is the single largest shareholder of this Fortune 500 entity with 61.58% ownership. SBI is ranked 155th in the Forbes list of Global 2000 firms (May 2014).

http://www.sbiuk.com

INDUSTRY

Financial Services

APTEAN SOLUTION

Pivotal CRM

BENEFITS

- Improved turn-around times for services across the business
- Flexible dashboard for management and controllers
- Centralised complaints tracking and management
- Flexible scalable solution allowing roll-out across all departments without further development

WHY PIVOTAL?

State Bank of India (SBI) first opened its doors to the UK market on 27th January, 1921 and has been growing ever since. To keep up with its rising customer base at its ten branches in some of the largest cities in the UK, including London, Birmingham and Manchester, SBI decided to invest in a system to manage their customer communications.

What made Pivotal (CRM) the solution of choice?

- Endorsed by an existing foreign deployment.

- Executive support from Aptean for a fast installation.

- Tailored to fit SBI UK's needs.

Aptean's solution, Pivotal CRM, stood out after State Bank of India UK (SBI UK) received positive feedback about the system from another regional operation of the bank, where Aptean had worked on a CRM project. As all businesses have unique needs to meet, flexibility was a key factor for the new system. Pivotal CRM was tailored to fit the demands of SBI UK straight out of the box. The option to customise data and workflow offered a high degree of control which was essential for streamlining services within this customer facing bank.

Based on experience in the Financial Services sector and an in depth understanding of customer facing industries, Aptean was able to help SBI UK improve their number one priority: customer service. The ability of Pivotal CRM to consolidate information relating to individual customers' cases was essential in offering a rapid and effective service. This has lead to an increase in customer retention rates.

It was clear from the initial discussions that SBI UK wanted to implement the CRM solution in a short time frame. Aptean's senior management team worked with SBI UK in partnership to ensure a smooth project implementation. This involved ongoing discussions, support and guidance with SBI UK feeding back to Aptean throughout. The team demonstrated that each and every customer is important.

THE PROJECT

Phase One - Marketing, sales, operations, branches, the contact centre and compliance

- The implementation of Pivotal CRM began on 31st January, 2013 with a target go-live date of the 31st March.

- Pivotal CRM was live at SBI UK's headquarters and all branches by 11th March, 2013.

- Phase one of the project lasted 52 days and was delivered across multiple departments.

A better flow of customer queries and improved customer handling were implemented, as well as lead management within marketing and improved analysis within compliance. The deployment was achieved without the use of a domain, this means that the system integrates with the hosting server's own local security policy. No active directory or single-sign on was implemented; Aptean introduced their own password history and enforcement routines within Pivotal CRM. The tight turn-around when implementing Pivotal CRM was achieved with focused goals and clear responsibilities at each level, with the overall project management kept simple which helped with acceptance within the company.

Good communication is essential in a project like this. The relationship between SBI UK and Aptean was smooth and open from the start. Beyond the technical side of the project, the most important needs of SBI UK were met first in the form of training in small groups, allowing for a smooth implementation for approximately 30 users.

APTEAN

Phase Two, Part One - Complex services tracking

Part one of phase two has also been delivered, providing tracking of more complex services by delivering service step functionality which has been customised in line with the service tickets. This allows turn-around times, query types and service team allocation to be set at ticket and step level. The clever use of combining ticket categories, service levels and service teams means that tickets and steps are automatically allocated turn-around times and service teams based on the ticket type. The result is a simple yet effective solution which meets SBI UK's customer service levels and resolves queries across the organisation in a single process.

BUSINESS BENEFITS

SBI UK received very positive feedback from their users due to the flexible dashboard for management and controllers. This helped with integrating Pivotal CRM into their activities. A noticeable decrease in turn-around times has also been seen across all sections of the business by having a complete view of all customer interactions in one centralised location. Increased productivity within the sales team has also seen significant gains by using Pivotal CRM.

CONCLUSION

With Pivotal CRM, SBI UK has experienced immediate results. A more streamlined system has introduced both past and current customer data to the fingertips of the service providers, allowing for an effective customer and feedback management process.

By customising existing out of the box functionality, SBI UK have been provided with a flexible yet tailor made system which perfectly delivers their requirements without the loss of any standard functionality.