

Banking; Relationship Manager's Workbench

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Relationship Manager Workbench solution is a platform to allow Banks to provide seamless experience for Relationship Managers in their Customer Engagement activities



Challenges

- Difficulty in Providing a Personalized Banking Experience: Typically, customers perceive banks as organizations that are impersonal and inattentive to the individual concerns of their customers. With the growth of digital banking, this feeling has only got exacerbated and made the job of the relationship manager more challenging
- Inefficient Resolution of Customer Concerns: Compared to most other B2C interactions, because of the exclusively financial nature of the interactions, banks' customers are more demanding. The major challenge banks face is ensuring a quick turnaround time for customer service requests.
- Changing Product Portfolio: There is constant innovation and churn in banking products and services being offered to customers Relationship managers are expected to apprise customers of these products and services.



Ideal Solution

- A platform for RMs where can focus on their key duties. They should be able to execute better consultative selling without spending time on accessing various applications, or navigate extensively for the necessary customer information
- Access to information on products and regulations should be readily available, RMs will be able to learn and build on their skills. This will help create better and information conversations with customers
- Relationship Managers should be able to offer appropriate recommendations to customers as they will be better informed and prepared in relevant interactions . This will help build customer confidence and conviction.



Desired Outcomes

Improved Banking Relationship Management by empowering staff, maintaining consistency across all touchpoints, adopting financial technology, educating customers on the bank's products, and being an advisor to customers and not just an impersonal service provider

Improve the productivity of RMs by equipping them with all the required data to better engage customers and share information between team members



Infosys RM Workbench Solution



Infosys Relationship Manager Workbench is a unified platform to allow Banks provide seamless experience for their Relationship Managers to enable and enhance their customer facing tasks and activities

Increase in Productivity

- RMs can focus on their key duties. They can do better consultative selling without spending time on accessing various applications, or navigate extensively for the necessary customer information

Better Readiness

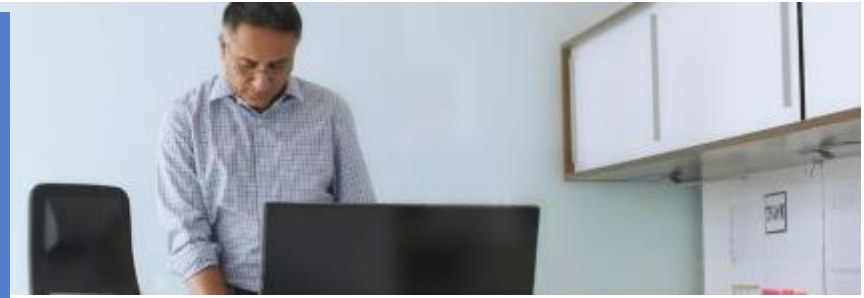
- With ready access to information on products and regulations, RMs will be able to learn and build on their skills. This will help create better and information conversations with customers.

Customer Satisfaction

- Relationship Managers will be able to offer better recommendations to customers as they will be better informed and prepared in relevant interactions. This will help build customer confidence and conviction.

Infosys RM Workbench Solution

Powered by
Power Platform



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Solution Alignment

Integration with Microsoft Products

Integrated with Microsoft Teams, Power virtual agent, Power BI and Outlook for effective collaboration.

This solution is well integrated with Microsoft productivity and collaboration tools to provide integrated digital experience to users.



Composable Architecture

Composable architecture of this solution makes easier to plug in and out capabilities based on the need of the RMs.

Usage of low code technology stack brings agility and flexibility to make changes as per business process for RMs.



Ready for Deployment

This solution is ready with features available for deployment. Both the UI and Data models can be customized during any customer implementation or can be implemented as it is.

