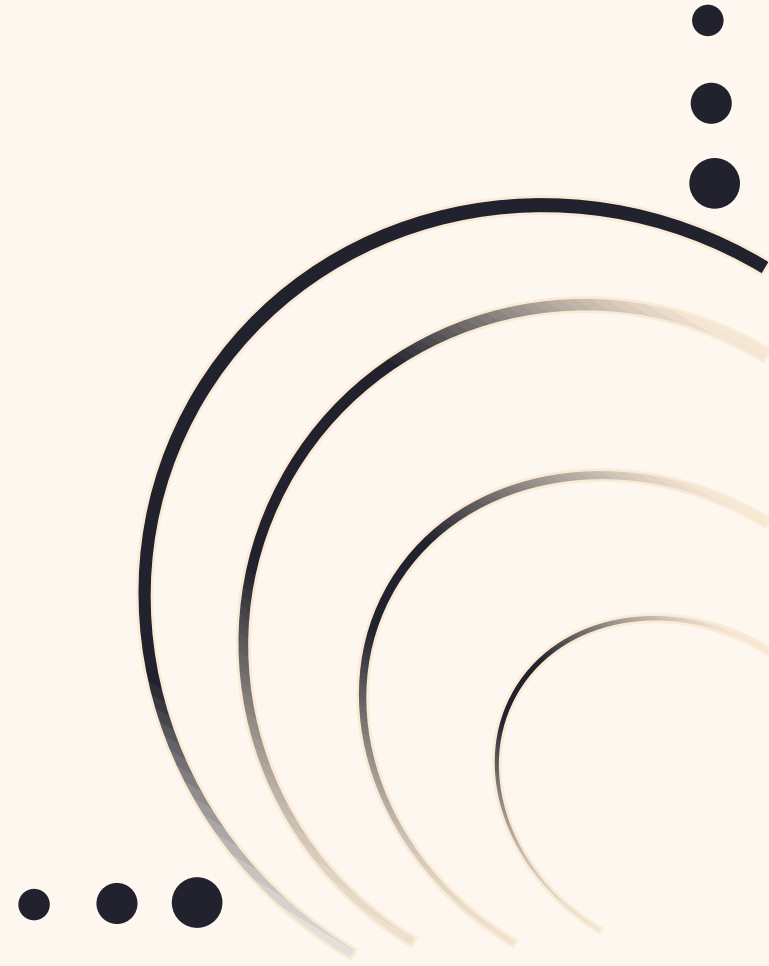# Digitization Projects

Automation of processes to bring operational efficiency
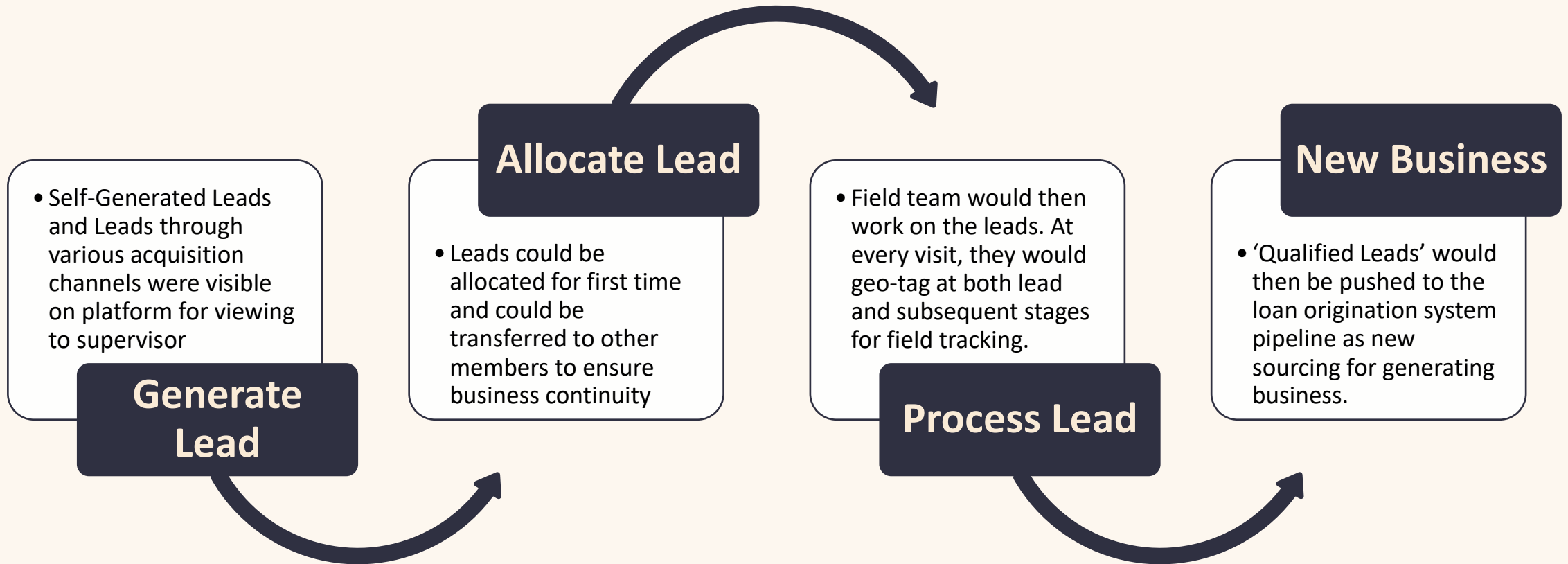
# Lead Management Module

# Lead Management Module

1) **Purpose:-** The purpose is to create a complete platform wherein all leads for the core business (unsecured loan portfolio) through different acquisition channels were stored, distributed and monitored by supervisors through an integrated platform. It gave a consolidated view to both the supervisor and the field team member to view leads and activity done on those leads.

2) **Acquisition Channels:-** Provision for various channels like Third-Party leads, Referrals through Aye App, processing top-up customers and upselling current customers through Customer Service team were envisaged.

3) **Benefits to the company:-** Following are the benefits of integrated platform:-

   - Leads on this platform could be generated in offline mode

   - Digitized the daily activity report manually maintained in branches.

   - Leads can directly be allocated by supervisors within their team for sourcing

   - Leads can be transferred by supervisor if there is any activity on one lead

   - Better visibility on activity of leads that helps in conversion.

   - Geo-tagging at every stage to track field team's field visit and payout conveyance on that basis.

# Lead Management Module

**Generate Lead**

- Self-Generated Leads and Leads through various acquisition channels were visible on platform for viewing to supervisor

**Allocate Lead**

- Leads could be allocated for first time and could be transferred to other members to ensure business continuity

**Process Lead**

- Field team would then work on the leads. At every visit, they would geo-tag at both lead and subsequent stages for field tracking.

**New Business**

- 'Qualified Leads' would then be pushed to the loan origination system pipeline as new sourcing for generating business.
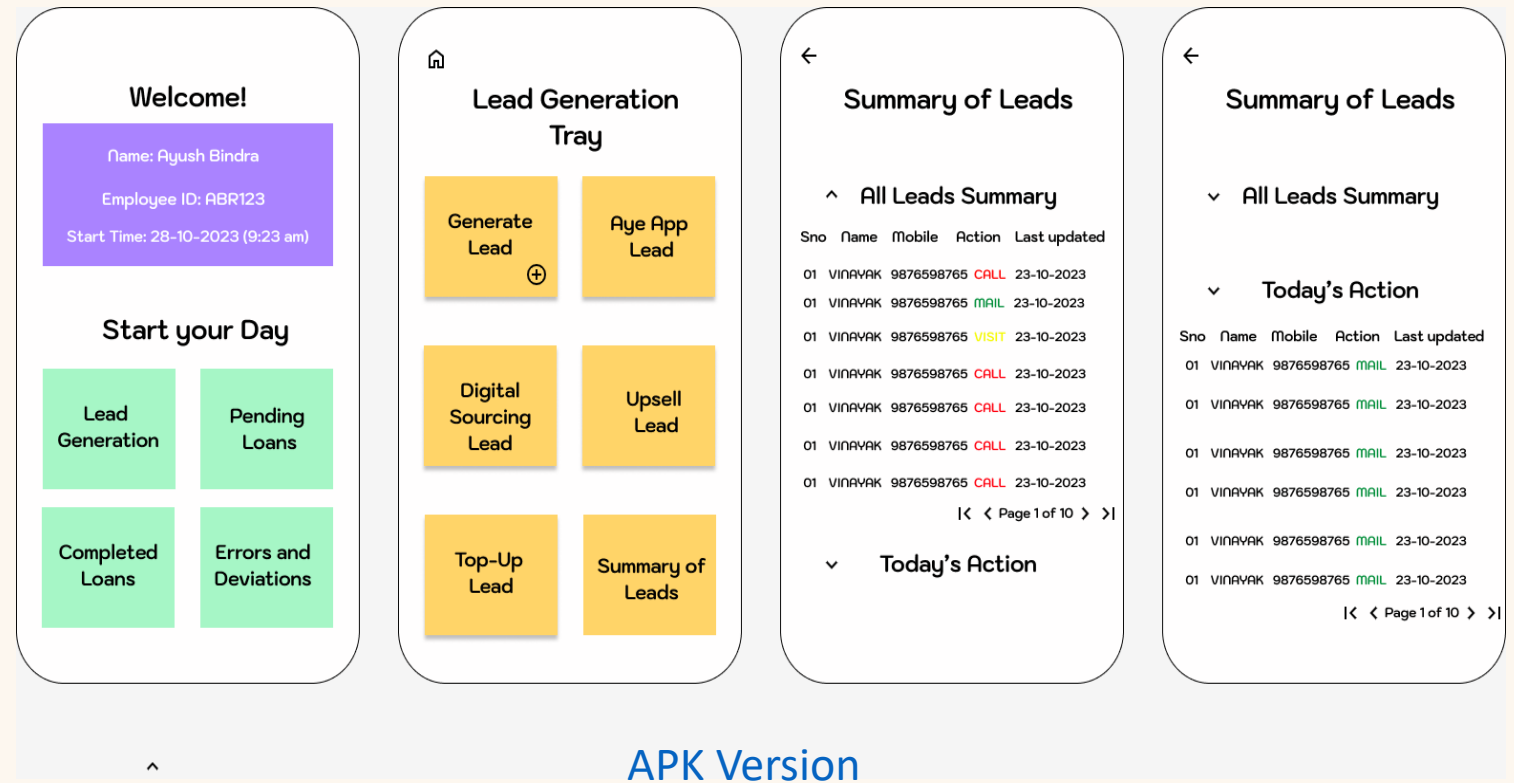
# Lead Management Module

## Prototype of the Platform*

**BRIEF INTRODUCTION:**
- This slide showcases the APK version of 'Lead Management Module'. This APK will be used by field team to get all the leads either allocated by the supervisor or generated by self.

**NAVIGATE THE PROTOTYPE:**
- Click on 'APK Version' to start the journey.
- The prototype opens with the 'Home Page' which has basic details of the field team member and facility to generate new leads. Click on 'Lead Generation' to proceed.
- The Lead Generation Tray gets visible wherein leads from various acquisition channels are bundled together. Summary of leads generated by self or allocated by supervisor is also provided in the last tab.
- Visit 'Summary of Leads' tab to view the details.



**APK Version**

*Indicative Sample
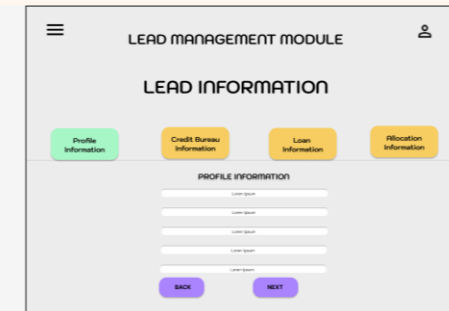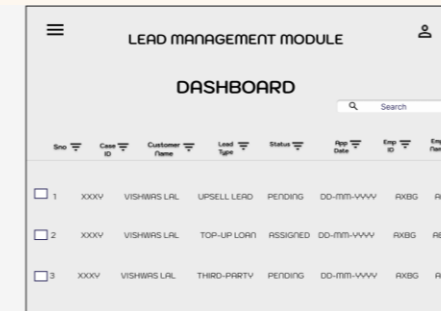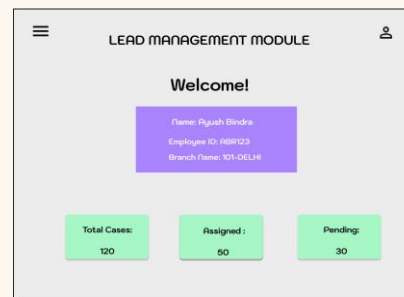
# Lead Management Module

## Prototype of the Platform*

**BRIEF INTRODUCTION:**

- This slide showcases the Web version of 'Lead Management Module'. This web platform will be used by supervisors to allocate fresh leads or re-allocate leads of exited employees to other members.

**NAVIGATE THE PROTOTYPE:**

- Click on 'Web Version' to start the journey.
- The prototype opens with the 'Home Page' which has basic details of the supervisor and the total leads assigned to this branch and have been allocated or yet to be allocated.
- Click on 'Hamburger' menu to start. Click on 'Dashboard' to visit the Dashboard showing the list of all leads.
- Then Click on 'Lead Status' to view the dashboard which indicates the loan status of the allocated leads.
- Visit 'Reports' section to view the UI to download the reports on all leads.
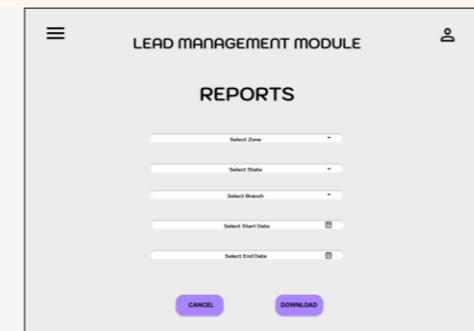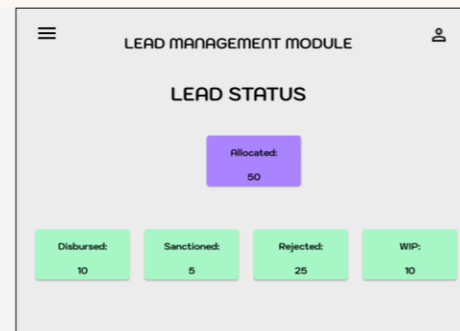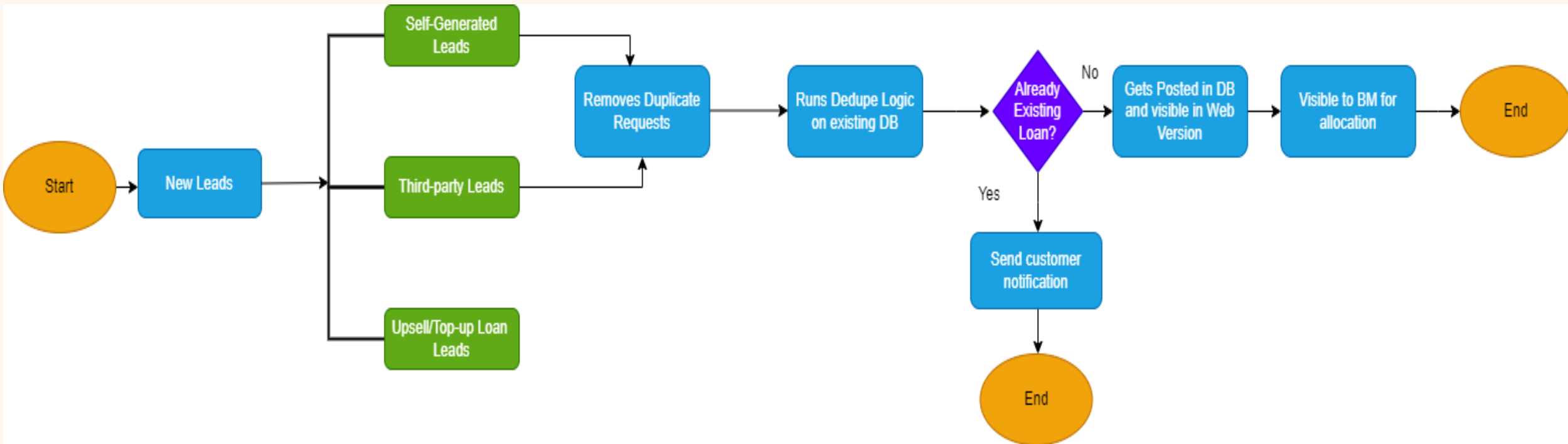


Web Version

*Indicative Sample

# Lead Management Module

Flowchart*



*Indicative Sample

# KEY RESULTS

## More Actioned Leads

- Conversion of self-generated leads from Lead Management to Lead Generation module increased from 40% to 75% by daily monitoring and weekly trainings conducted for field team.

## Idle Leads Allocation

- Conversion of idle leads (mostly third-party leads) improved by 10%, which reduced sourcing TAT for third-party leads from 6 days to 4 days by concentrating on low preforming branches through daily monitoring and weekly trainings.