



Client Background

- The client is one of the large NBFC
- They deal in rural equipment and tractor financing
- A large portion of their sales happen via cross sell and up-sell

Challenges faced

- Obtaining new leads on a continuous basis
- Ensuring generation of cost of lead is minimalistic
- Face to face interaction in rural parts is quite expensive and tiresome for agents as there is lots of travel and movement involved
- The leads needs to be generated keeping a pattern

Solution Provided

- A customized lead management system was designed keeping the in-house team and field staff in mind
- The process for identifying the prospect using analytics was defined based on numerous past transaction history.
- A new inside sales team was organized and structured to execute the inside sales activity.

Executions

- The in-side sales team was trained on skills to maximize the conversion
- The analytics team identifies the prospect, and feeds the LMS on a bi-monthly interval
- The prospect are followed and converted into leads
- The leads are displayed on real time basis to the field agent and branch officers for follow-up and conversions
- The conversion are reported in the tool for closure.
- The review of the program happens on a weekly basis.



Impact

- Approximately 80K+ Leads are generated annually
- Approximately 12K+ leads are converted annually
- The team in the field has been able to meet their monthly targets in a most cost effective way
- The program has moved into the 3rd year of existence with enhanced targets
- Additional cross-selling processes have been introduced into the program for additional business

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