



## **Case Study of iWeb Sales Force Automation (SFA) Module For a Financial Products company based out of Mumbai, INDIA.**

The Company is into distribution of financial products all across India. Sales is carried out of multiple products like credit cards, life insurance products, general insurance products, fixed deposits and mutual fund

### **Problems before implementing iWeb Enterprise:**

- There was no tracking of leads generated by the financial consultants
- Analysis of the business generated in terms of total premium, revenue was carried out manually in excel sheets related to each branch
- Duplication of work is done for generating consolidated reports
- Attendance of territory manager, team leaders and financial consultants was not tracked in a systematic manner
- There was no qualification of leads done but only business generated was recorded
- Calculating the commission due to all employees was done manually which could be erroneous.
- Revenue generated by company was calculated manually.
- To retrieve the data for comparing sales was very cumbersome and time taking
- Performance analysis of financial consultants, managers and team leader was not accurate due to lack of proper information
- MIS reports generation was very tedious task

### **Challenges Faced by the iWeb Enterprise Implementation Team:**

The biggest challenge was streamlining the standardizing the formats as there were lot of redundancy found in the documents used. Since the team members were not technology savvy it was very difficult to make them understand on the process automation resulting from the application. Training and enforcing the usage of system was again a challenging task.

### **iWeb Enterprise Modules Implemented:**

**SFA** – Sales force Automation

### **Scenario After iWeb Enterprise Implementation:**

- Leads from all over india were entered into the system hence on real time basis prospective business analysis can be easily carried out
- Qualification of leads in terms of hot, warm, cold was made possible for proper business and performance analysis
- Attendance tracking was streamlined based on the login information
- Total new accounts generated can be known at any point of time

- Product wise commission can be configured in the system and based on the sale done total commission due to the staff is available on single click
- Total revenue generated information is 24/7 available on the fly at the click of a button
- Based on the available historical available product and sales strategy can be planned by the sales department
- Statistical and graphical reports are now available in real time
- Performance analysis is now accurate for each working professional
- Information in terms of revenue related to all branches is available in few clicks thus saving a lot of time in manual analysis which quickens the decision making process too
- Since iWeb Enterprise is a totally web-based application. With a single deployment at the server – the system was up and running on all clients via browsers. The customer uses Linux, Macintosh and even Windows 98, XP, 2000 on the client side and our application is working on all OS, cross browsers – like IE, Opera, Mozilla, Mac IE.

**Winning points:**

Post the SRS, this project was managed totally remotely. Our Winning point in this case was the strong iWeb Implementation and Customization Methodology which is made after 8 years research and experience on various projects and by strictly following the ISO, CMMi and Six Sigma Standards all blended together along with iWeb 's proprietary RAD Tool – 'AgileWiz' which is a codeless tool which makes programming redundant