



CASE STUDY

Customized customer relationship management for a reputed financial company





The client

One of the leading financial services company in India with 24 years of experience and having more than 80,000 customers.



Business situation

The client was using a manual process to maintain the records of their customers and sales & marketing activities. Due to an increased number of customers and sales volume, the client started facing problems with the existing number of personnel with the manual system. Client approached Briskon for a new cost effective online system.



The challenges

Understanding all the processes while communicating to all departments and creating a roadmap in a way that all users get benefits with the new system. The system must serve the sales pipeline, cross marketing, and customers with a single online application. The system has to be highly scalable and robust to accommodate additional functionalities and features.





The solution

Briskon developed an internet based centralized robust application providing automated functionalities pertaining to sales automation, customers, proposal & invoice generation, cross marketing, emailing etc.



Important features captured with solution:

- User profile maintenance
- Sales pipeline details
- Lost pipeline details
- Account management
- Customer details
- Proposal & invoice generation
- Online calendar
- Cross marketing
- Email
- Mail labeling
- Online knowledge bank



The benefits

**Centralized database
connecting all the
stakeholders**

Ease of work

Clear visibility of sales

**Quick quotation
generation using
predefined templates**

**Efficient communication
with customers**

**Handling large numbers
of customers**

**Handling customers
better with designated
account managers**

Are you looking for any customized customer relationship management software that will help you automate records and sales?

Contact us now to explore all the features of our customer relationship management services.

Contact us



About Briskon

Founded in 2005, Briskon is a full-service digital marketing and custom software development company that operates from Bangalore, India.

Briskon is a highly process-driven organization with extensive experience providing excellence in the digital world. The young and vibrant team at Briskon consists of highly skilled, forward-thinking managers, analysts, programmers, marketers, designers, developers, and QA personnel who have been working together to deliver world-class quality products and solutions. Our unerring commitment to quality and continuous learning to stay abreast of the latest technologies enable us to consistently deliver customer delight.

Our approach extends our innovative technological capabilities to serve clients across all domains. Briskon's solutions expand to cover the entire spectrum of IT, software products, digital transformation, digital marketing, and professional services.

Contact us today for all your software development and digital marketing needs.

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