

# Enhancing customer experience through contact center transformation

HCLTech leverages the Pega platform to deliver  
personalized CRM solution



The client is one of the major banks in APAC. They offer a range of financial and wealth management services such as deposits, credit cards, lending, corporate banking, international trade finance, investment banking, cash management services, private banking, treasury services, and more. The company onboarded HCLTech to leverage our expertise and avenues to orchestrate large scale multi-country Pega platform rollout programs to fast-track digital adoption.

## The Objective

### Revamping the CRM platform

The bank undertook a major transformation program to remodel and standardize the sales and service platforms across its Singapore and Malaysian centers. They wanted to empower their sales and service staff to manage all customer interactions across all touchpoints including branch, call center and web in an efficient manner. With this, they envisioned offering personalized

interactions that enhance customer experience, procure relevant and personalized offerings, and improve the overall service to gain higher sales conversions.

HCLTech started working with the client to redefine their customer journey by upgrading the CRM platform from Siebel CRM to Pega CRM.

## The Challenge:

### Creating an automated, service-focused platform

The bank was battling multiple issues before the large-scale digital adoption of their CRM platform. They had to drastically improve customer handling time as moving between different systems was highly time intensive. They were also inundated with repetitive service requests that were creating bottlenecks and impacting service quality.

The need to offer service customization and automate service requests with omnichannel offerings rounded up the challenges. They onboarded HCLTech to deploy a single portal to manage all interactions with a centralized view of customer product holdings.



## The Solution:

### Delivering a next-gen best-in-class CRM platform

The answer was deploying the next-gen Pega platform that will transform CRM across the enterprise. We planned out the delivery roadmap in three phases:

**Phase 1:** The country 1 implementation included channel interaction (voice), case management, lead management, and STP through card activation, and Customer 360 (only CASA, Loans & FD/TD).

**Phase 2:** The country 2 implementation included STP through card activation, lost card replacement, statement requests, case management, lead management, and channel integration (voice).

**Phase 3:** The country 1 and 2 implementation included channel interaction (email) and Customer 360 through Interaction history and correspondence, STP (financial and non-financial) product promo, and card termination etc.

With the task cut out, HCLTech implemented a best-in-class domain led vertical solution leveraging the Pega platform for customer relationship management (CRM). We customized the end-to-end, OOTB Pega UI to enhance the user experience through simplification. Integration of more than 30 host systems and more than 300 online services unlocked a near-real-time, 360-degree view of the customer that

facilitated better CRM.

The platform's native case management framework automated case and service request (SR) creation accelerating effective tracking of service requests and tasks. And finally, the system was integrated with the existing Avaya system framework by customizing the Pega native web socket-based telephony integration framework.

### The full list of key solution elements included:

- Next-gen CRM using customized Pega UI
- Unica for NBA and campaign management
- Pega Rules Process Commander (PRPC) for business rules management
- TIBCO Business Works for real-time SOA
- Avaya voice channel interaction, and data migration for service modules
- STP for card activation, card replacement, etc.
- Complex case data migration from Siebel CRM to Pega CRM using SSIS
- Seamless integration with core banking, treasury, and content management systems
- Accelerated multi-country rollout through 92% reuse of common functionalities



## The Impact:

### Unlocking growth and profitability with CRM transformation

The Pega CRM implementation by HCLTech helped the client maximize opportunities generated by efficiently serving more than 5 million customer annually. The team's

burdens were substantially reduced now that it took less than 5 seconds to get a 360 view of the customer product holdings. Several other measurable outcomes included:



**45%**

improvement in productivity of over 3000 frontline staff



**95%**

increase in customer interactions



**40%**

increase in cross-sales



**29%**

decrease in account opening time



**30%**

improvement in the average handling time improved the customer journey