

FAQ for Omni channel Ticketing Services

Target User Divisions

- Is this solution intended for use in Retail, Institutional, and Corporate divisions? If so, do you have any specific division-wise requirements or preferences?

Mainly solution is intended for retail and internal corporate users

- Will the Customer support process be the same or different for these divisions? If different, could you provide a detailed explanation of your customer support lifecycle for each division? –

There will be slight difference for clients and internal clients. For clients – complaints will be centralised at Custcare for retail clients while internally there will 3-4 support department which will be the first responders / owners / service providers.

- Are you considering the solution primarily from a "Chat First" approach or a "Ticket First" approach for all divisions? –

The solution will be primarily from a “*Ticket first*” approach for all divisions.

Quality Monitoring/Management System

Can you elaborate on your expectations for a quality monitoring/management system?

Ticketing – inter-department movement of tickets across channels – end to end client support till the complaints are resolved.

Dialler Clarity

Have you purchased any Cloud Telephony? If not, would you like us to suggest any?

There is no *cloud telephony* but will look to implement one.

APIs

Do you have RESTful APIs available for the integration with your internal & external systems?

No, we do not have RESTful APIs available for the integration with the internal & external systems

Integration with Twitter

How do you envision integrating with Twitter? What specific functionalities or data exchanges do you anticipate with Twitter integration?

Only functionalities would require to only reading tweets addressed to IDBI Capital and respond back through DM

Error Logging and Unique Error Codes

What are your expectations regarding error logging? Do you have specific requirements for maintaining error logs and unique error codes?

No, but can be discussed

Custom Entity Requirement

Could you elaborate on the use cases for custom entities?

To keep a track of the type of queries being received by the clients to the customer care team. Below are the list of queries we receive.

Note: The below list is only indicative.

<i>Account Modification</i>
<i>Login Related</i>
<i>Statements</i>
<i>Mutual Fund</i>
<i>Portfolio Corporate Action Related</i>
<i>IPO</i>
<i>Lien Buying Power</i>
<i>Trading Related</i>
<i>DEMAT Related</i>
<i>Brokerage Related</i>
<i>Ledger Related</i>
<i>Account Closure Related</i>
<i>Unauthorized Trading</i>
<i>Account Opening</i>

CRM

Are you also looking for a Sales Execution platform, which can help your team in managing leads, opportunities and closure of sales cycle? If yes, could you provide a more detailed explanation of your sales lifecycle?

No, we are currently looking only for Omni channel ticketing services

Users

What is the split of these 50 users across the Sales, Marketing and Customer Support team?

*The split of 50 users across all segments are as follows-
10 custcare, 15 Support teams, 10 sales, 10 escalations*

What is the anticipated user base expansion within these departments over the upcoming two years?

120 – 130 including internal users to be added

Volume of Tickets

What's the current volume of tickets, which you receive on a daily/monthly basis?

Current volume of tickets would be around 500 tickets on Daily basis (250 emails and 250 calls), (+- 10%.)