

## CASE STUDY

# CAPITAL MARKETS: ACTIVATION PROCESS

## Problem Statement

- Stringent dialer requirements to ensure compliance requirements
- Low Conversion Rates
- Ad-hoc campaign requirements
- Efficiency not meeting benchmarks

Average Sales Conversion Per Associate  
Q1: 3.65 Q2: 4.20 Q3: 7.46 Q4: 10.4

**184%** ↑  
Improvement

**100%**

adherence to Policies and Procedures

## Problem Scope

Outreach campaign management to get customers to transact in the Equity markets

## Our Solution



Process mapping



Dialer framework and configuration to ensure API integrations, DNC, attempt tracking, interval between 2 calls, calling window, call back feature, sticky agent and real-time reporting completed



Performance Management System to track efficiency & effectiveness



Training & Quality interventions including score-card creation for all roles aligned to client expected outcomes