

CRM Support System

Implementation Partner: International Distribution Corporation (IDB) | Customer: SSI Securities Corporation (SSI)

ABOUT PARTNER

IDB develops, realizes, markets and operates future-oriented and reliable VoIP Systems for telco, internet and mobile service providers, cable operators, utilities, and enterprises.

Solutions and services are custom designed and implemented to meet specific needs, deployed in excellent quality catering to industries such as financial services, sports, and more.

CUSTOMER AT A GLANCE

SSI Securities Corporation (SSI), is a leading financial institution with one of the fastest growth rate.

With strong financial capability and high standards corporate governance, SSI offers a wide range of financial products and services including asset management, investment banking, securities brokerage, securities trading and more, while maximizing shareholders value.

The company has a large network of branches/transaction offices covering major cities throughout Vietnam, such as Hanoi, Ho Chi Minh City, and Hai Phong.



Industry:
Financial Services



Firm Size:
501-1,000 employees



Country:
Vietnam

CHALLENGES

- The intricate stock exchange processes made a centralized processing system unfeasible
- As a result, each department had its own dedicated application to address customer tickets. However, this system, which could only be operated on computers, often caused delays in routing customer requests to the appropriate department
- Unable to maintain consistency in resolving customer tickets
- Legacy applications failed to ensure protection in customer and information security, and could not quickly adopt and deploy updated working procedures
- Tremendous effort was required to create different types of customer request forms for assignment to the corresponding departments
- Significant expenses and time were required for modifying a form
- Support and resolution forms were scattered across multiple applications, making it difficult for users to follow up
- Data fragmentation impeded effective customer request management
- Needed to consolidate all departmental data into a centralized information system to avoid constant switching between apps and systems, and to allow easy data retrieval for reporting, streamlined workflows, and time reduction in sifting through spreadsheets

SOLUTION

With the support from IDB, a **CRM Support System** was built on the Joget platform within 2 months to streamline the customer onboarding process and enable seamless communication, engagement, and interaction through various channels such as phone, email, and chat.

RESULTS

- ✓ Implementation of permission control to ensure appropriate data distribution and security, granting users access to only specific data
- ✓ Integrated data from multiple sources into a central system, resulting in significant improvement in data management and up to 80% time reduction on data searching, while eliminating toggling between multiple applications
- ✓ Reduced costs by 10% while also increased procedural efficiency by 30%. SSI can now enjoy greater flexibility in reporting with an all-in-one database
- ✓ Seamlessly managed onboarding process via mobile devices with built-in PWA (Progressive Web Apps) capability



80%
Time reduction



40%
Cost reduction



SECURE
Permission control