

The financial advisory firm aims to automate its operations



Client Profile

Our client is a prominent player in the Indian Market, specializing in Stock Portfolio Management and Mutual Fund Advisory services. With over a decade of experience, the company has expanded significantly, serving over a million premium clients in India, and initially established itself through a tight-knit business network and connections.

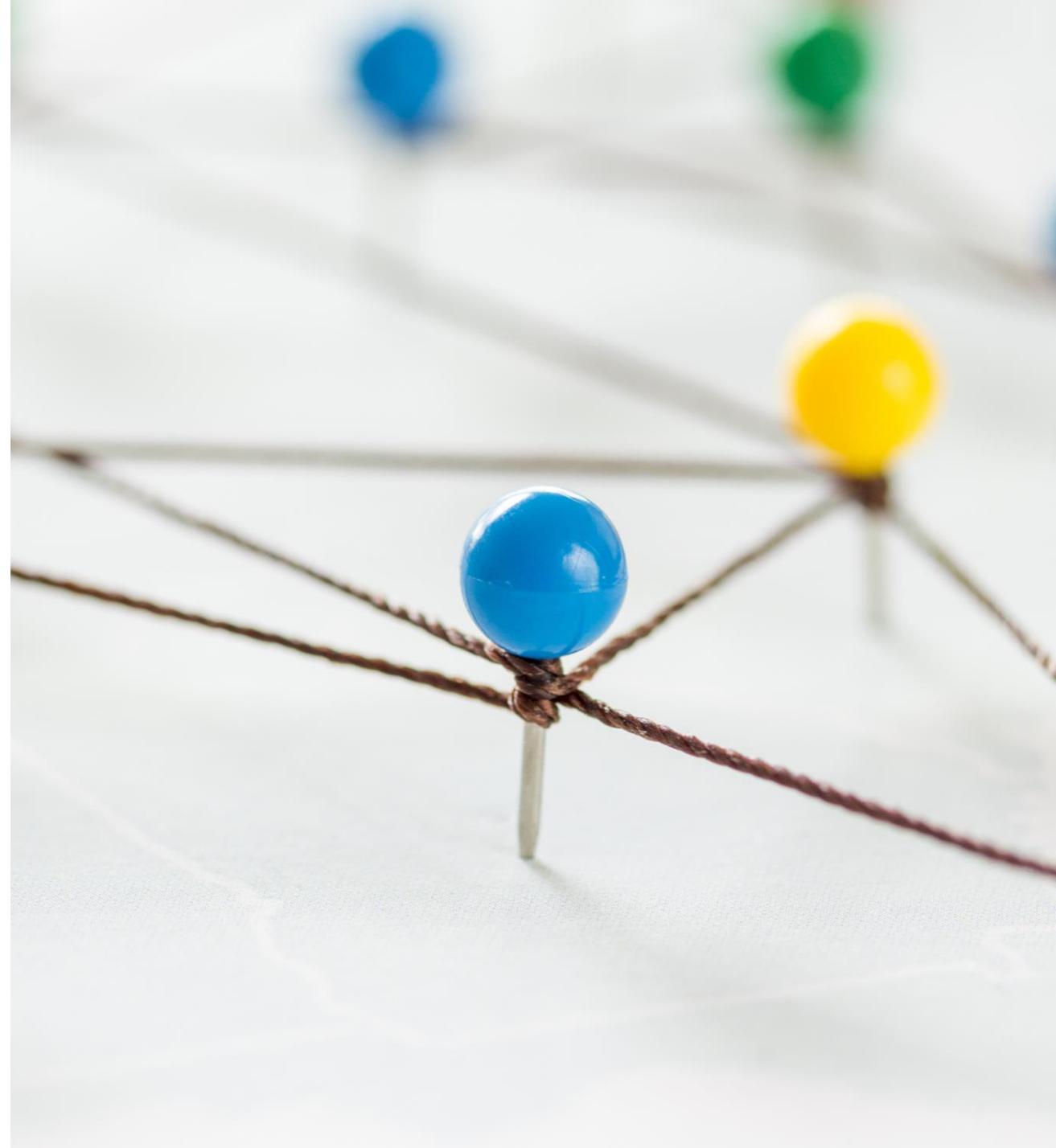
Challenges faced by the client

The initial company setup involved manual management of leads and opportunities using notepads or Excel sheets. As the company expanded and the team grew, challenges arose in efficiently handling business processes and existing customer relationships. The traditional CRM application proved insufficient for overseeing the team's daily activities and tasks on a centralized dashboard. The customer faced the risk of losing existing business and struggled to capitalize on new opportunities. The challenges encompassed:

Dispersed Data: The data is fragmented, with team members individually managing and exchanging information through email. The team leader dedicates a significant amount of time collecting data and creating reports using Excel sheets, which must be managed for future processes.

Task Management for the Team: Effectively tracking and managing the team's tasks using limited communication tools and skills presents a challenge for the customer.

Opportunity Management: Despite trying various CRM systems, the customer struggles to effectively manage opportunities and communicate with clients. The process of following up with clients and obtaining necessary documents for further processing proves to be challenging.





Our Solution:

- Sketos recommended a web application designed to sync seamlessly with the existing CRM, extracting new sales data. This application aims to enhance the user experience by offering a more intuitive dashboard that provides crucial information readily available for immediate action.
- Key features include efficient management of team and task activities, empowering team leaders to support team members proactively. Additionally, regular notifications are implemented to ensure timely tracking of all activities.
- Moreover, the application incorporates predictive analytics for future business revenue, providing management with valuable insights to plan and strategize accordingly.

Our Approach:

Comprehensive Understanding: We began by thoroughly understanding the business flow and identifying pain points in day-to-day tasks.

Collaborative Communication: Engaging with both teams and team leaders, we diligently documented each step of their processes to ensure a comprehensive grasp of the operational landscape.

User-Centric Design: Focused on user experience, our approach involved creating an application with a user-friendly interface and an intuitive flow. The emphasis was on ensuring ease of use for all team members.

Seamless Integration: To maximize efficiency, we implemented API connectivity with the existing CRM application, facilitating a smooth and seamless interaction between systems.



About Skeletos



Skeletos connotes a framework. A framework that enables enterprises to modernize digitally.

'Skeletos' IT Services is a Pune-based Dynamic Software and IT Services company, having a presence in the USA. With a collective experience of 20 Years in Software development, DevOps, SysOps, Cloud solutions, Networks, and IT Infrastructure Management, we deliver solutions that leverage the latest technologies and are essential for sustainable business solutions Thus bringing value to the investments. 'Skeletos' takes a step forward by providing services that help in the fast and easy transition towards digitized processes and pre-emptive analytics.

We provide end-to-end solutions through our STRATEGY FIRST, TECHNOLOGY NEXT... approach.

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