

Case Study: Improving Customer Engagement for PhonePe - one of the largest fintech company in India

Overview

PhonePe is an Indian digital payments and financial services company headquartered in India. The PhonePe app, based on the Unified Payments Interface (UPI), went live in August 2016 and is available in over 11 Indian languages. Using PhonePe, users can send and receive money, recharge mobile, DTH, data cards, make utility payments, pay at shops, invest in tax saving funds, liquid Funds, buy insurance and mutual funds and gold. PhonePe is accepted as a payment option at over 17.5 million offline and online merchant outlets across 500 cities in India covering food, travel, groceries, medicines, movie tickets etc. It has over 280 million users.

Challenges

- **Lack of Workflow Standardisation**

With a rapidly increasing customer base, PhonePe was finding it difficult keeping track. Workflow standardisation was the need of the hour, to make processes measure-able, devise indices, track them, draw comparisons and learn from them.

- **No Standard Process for Customer Visits**

Used for onboarding, audits, and servicing, field sales and service teams were not reporting back in prescribed formats. Thereby, there was no visibility into their field activities and no performance measurement mechanisms.

- **No Offline Availability**

Unable to collect data due to bad Connectivity issues caused information delays and problems to the mobile workforce.

- **Duplicative Efforts**

Repeated visits to the same customers, while others were left unattended as office staff could not check on any activities of the field staff.

- **Lack of Transparency**

There was no transparency in field activities and office staff is also in the dark about it

- **Absenteeism**

No standard measurement of performance was there in place so there was certain absenteeism seen from the field employees

The Effort Solution

- **Streamlined Workflow Standardisation**

The information-gathering process was streamlined to reduce the difficulty of keeping track of data. Processes were made measure-able and trackable and pre-sales gathering of customer information was streamlined.

- **Standardized Process for Customer Visits**

Customer interface proceedings were recorded for onboarding and audits while customer satisfaction surveys are conducted through the app to track servicing thereby ensuring a standardized process for all visits.

- **Improved Customer Interface**

- All visits are automated. Day plans and route plans are auto-assigned ensuring no repeated or unattended visits
- Customer check-ins were captured in terms of frequency and the duration of each visit
- A minimum amount of time was now being spent at the customer's point of contact. There was no excess there and wastefulness was checked
- Shortcomings from the point-of-view of marketing can immediately be reported by simply feeding inputs into the app while on a visit to an outlet

- **Offline Solution**

More often than not, the customer location has no internet connection. That's why Effort is designed in a way that it can be used fully and seamlessly even when there's no connectivity.

- **Transparency**

Activities such as feedback on branding shortfalls at outlets are all done through the app, ensuring full transparency of all activities.

- **Employee Punch-Cards**

Employee punch cards regulated attendance and checked absenteeism. At customer location, sign-in/sign-out is used to get geo-tagged activity data. Exact hours put in and the productivity is now being measured to ensure discipline.

Special Changes Done Since COVID-19

- **New Challenges**

Earlier information gathering processes, customer visits, direct user registrations, collecting feedback, and promotional visits were all done in person directly by the field executives. But since the pandemic, customer visits were completely cut off causing the fear of business continuity.

Workflow Process Change

- Designed a process where information was collected through calls, new user registrations were done online and customer feedback was collected with Effort's dynamic online forms.
- Data was now being collected from other sources but was still linked to Effort's platform for keeping track of all activities.
- All of these new changes were streamlined within a day and were put to use.

The Benefits

- Customer facetime improved by 10 minutes
- Unattended customer visits reduced by 100%
- Unique visits per month increased by 200%
- Monthly growth in customer acquisition increased by 200%
- Customer satisfaction jumped by 150%
- Lead time for support reduced by 5 days
- NPS score improved by 50
- PlayStore rating went up by 0,3
- Field employee efficiency improved by 32%

About Effort

EFFORT is a domain agnostic, self-service enterprise mobility solution to manage workforce, digitize activities, and orchestrate business workflows. It is the one stop solution that allows you to configure, plan, schedule, assign, dispatch, execute and monitor business activities and processes and is an integrated platform that provides the agility through cloud, mobile, AI, voice, and IoT technologies

Configured
60+
Workflows

Daily
2MN+
Activities

Completed
1MN+
Workflows

Active
50K
Workforce

Used In
10+
Verticals

Around
10+
Countries

Connect with us

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