

Fast Facts

Customer

Sushil Financial Services
Private Limited (SFSP).

Software

InnoVision is an application for creating calls and publishing them through the various products of the company.

Division

Software Development and
Consultancy

Platform & Technology

- Microsoft Platform
- Web Application
- Exchange 2007 API

Objectives

- Create a common user interface to access all calls
- Provide a common platform to all the stakeholders for sharing data.
- Cost effective solutions for automatic creation and sending of SMS/Emails.

Summary

- InnoVision provides an efficient way of managing calls.
- Enlighten the investors with reliable information.

Executive Summary

InnoVision is a Web Based application for creation of investment advices (calls) and publishing them through the various products released by Sushil Financial Services Private Limited (SFSP), a major brokerage house which is also empanelled with over 40 financial institutions / banks. To pursue a customer-centric approach they identified a need for creating a web based application which includes creation and updating of financial products and also tracing / monitoring of various calls made for each product.

The Business Problem

SFSP releases many calls in a day which are intended for all the various kinds of investors. These calls are released in the form of Emails and SMS to their customers. The analysis includes calls on Equity, Commodity etc and the various exchanges related to them. These calls are released by fundamental and technical analysts who conduct a thorough analysis before releasing their products. The calls released by the analysts were not getting shared due to lack of a common platform. Due to this, the Customer Relationship Manager (CRM) found it difficult to pass on the latest analysis to the customer.

Key Challenges

- Create a common platform/application to address the different products of all the analysts.
- Automatic triggering of Email and SMS from the application
- Speedy and timely creation of the calls since time is one of the most important factors on the different exchanges.
- Centralization of all calls released by the various analysts

Solution

The Software Development and Consultancy division at Celusion Technologies, studied the requirements, analyzed and produced a feature list and software architecture that met the requirements. The solution involved creating a web based application. The primary objectives met were:

- Managing the exhaustive list of products
- Managing calls of each product and auto archival of closed calls.
- Automatic triggering of SMS and Emails
- Sharing the various calls with the CRM's and in turn with the customers
- MIS reports, checking for the compliance of the customers Portfolio based on the Golden Rules of portfolio management.