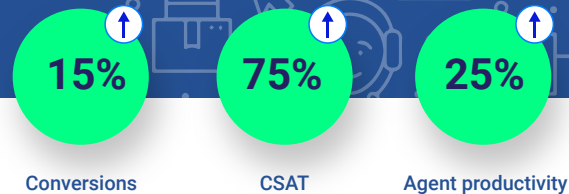# 15% Boost in Conversions: How oneCXi Streamlined Enterprise Capital's Sales and Service Operations

Use Case: Sales & Customer Service | Industry: NBFC | CRM: Zoho

15%
Conversions

75%
CSAT

25%
Agent productivity

Objective

Enterprise Capital sought a centralized solution to boost sales of their financial products and enhance customer service efficiency. Their goal was to streamline operations, ensure 24/7 availability, unify customer interactions across channels, and enhance service to elevate satisfaction.

Solution

Enterprise Capital leveraged oneCXi's full-stack platform to centralize operations and streamline customer interactions. This solution provided 24/7 support, automated lead management, ensured privacy, and accelerated customer service response.

Results

Enterprise Capital's customers were able to connect with their relationship managers anytime, anywhere. Automated lead flow led to a 15% increase in conversions. Enhanced privacy and rapid resolutions drove CSAT scores above 75%.

About the Company

Enterprise Capital (bizcred.com) is a lending marketplace that helps business owners grow with equipment financing and working capital loans. They have built a team that consists of professionals with deep knowledge of the industries their clients represent. Each agent builds strong relationships with clients and provides personalized solutions.

How to Streamline Sales and Service Operations for Greater Efficiency?

Enterprise Capital is known for providing highly personalized solutions to their customers and ensuring round-the-clock availability. With significant investments already made in telecommunications, they sought a customer experience (CX) solution to consolidate their existing infrastructure. The goal was to centralize their sales and service operations, enabling seamless collaboration and eliminating geographical barriers. By achieving a unified view of customer interactions, they aimed to automate lead flow, ensure data privacy, and deliver high-quality, swift customer service.

Features: Auto Dialer | Real Time Monitoring | Number masking

Automating Lead Flow for Increased Efficiency and Conversions

Previously, leads were created manually, requiring agents to enter and track information, which was time-consuming and prone to errors. Enterprise Capital sought to enhance lead management capabilities and improve sales process efficiency. Through a robust integration of the oneCXi dialer with Zoho CRM, leads were automatically populated within the CRM and were seamlessly accessible directly from the oneCXi dialer. This integration automated call handling and tracking, increasing efficiency by managing large volumes of calls. It streamlined the lead management process, enabling agents to access and manage leads more effectively. The automated lead flow boosted conversion rates by 15% and reduced handling times, resulting in faster deal closures and improved overall efficiency.

Ensuring Privacy and Delivering Superior Service to Enhance CSAT

Enterprise Capital aimed to ensure customer service availability, maintain customer privacy, and boost customer satisfaction. With oneCXi, customers could reach their relationship managers, and calls were automatically redirected to the agents' mobile devices, ensuring seamless communication while masking personal phone numbers. The oneCXi-CRM integration facilitated automatic case or ticket creation based on the nature of the inquiry. By centralizing their operations, agents efficiently responded to prospects or customers directly from their mobile devices, regardless of their location or the time of day. This approach not only enhanced privacy but also ensured quick resolution, achieving a CSAT score of over 75%.

Boosting Agent Efficiency with Automated Tracking and Insights

With oneCXi, the system tracked both incoming and outgoing conversations, automatically logging them into Zoho CRM. This integration simplified tracking, note-taking, and follow-up, providing a centralized view for analyzing insights. By offering real-time monitoring and comprehensive reports, oneCXi helped Enterprise Capital enhance visibility into team performance and reduced after-conversation work. This streamlined approach boosted agent productivity by 25% and facilitated better analysis of customer interactions and more informed decision-making.

Strengthening Existing Infrastructure, Ensuring High Uptimes with oneCXi

Enterprise Capital had already made significant CAPEX investments in telecommunications and needed a CX solution that would enhance their existing infrastructure. oneCXi's robust platform provided an upgrade with network redundancies, ensuring high uptime and effective management of call volumes. Moreover, oneCXi also enabled advanced front-end features such as IVR, skill-based routing, mobile call forwarding, and detailed reports and analytics. This approach allowed Enterprise Capital to maintain their existing telecom provider on the back end while enhancing their customer experience capabilities.

Benefits & Overall Impact

With oneCXi's unified platform, Enterprise Capital streamlined lead management, built trust, and enhanced operational efficiency and service quality. The positive outcomes included a 15% increase in sales conversions, improved agent experience, and elevated customer satisfaction. These improvements ultimately drove better business performance.

- 15% Higher Conversions
- 75% Increase in CSAT
- 25% Increase in Agent Productivity
- 24/7 Support

About oneCXi

oneCXi is an industry-leading unified customer experience intelligence (CXi) platform that helps enterprises engage, convert, and retain customers, at scale. The AI-engineered platform empowers businesses to orchestrate journeys across a multitude of touchpoints, power billions of personalized conversations, and gain a 360º view of customers across the lifecycle. 3,500+ global brands trust oneCXi to capture the pulse of customers, drive cohesive experiences, and increase lifetime value.

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