

# SunTec helps one of the largest investment firms deliver superior customer experience

The client is a multinational financial services corporation, managing a large family of mutual funds with fund distribution and investment services. Other areas of operations include wealth management, brokerage services, life insurance and securities execution & clearance. With competition piling up, the client wanted to improve their customer experience and delight their customers.



CASESTUDY

SunTec<sup>TM</sup>

The power to xelerate

## Business Challenges

- ⦿ The institution's fee calculation process was still manual and operated through different silos making it a tedious process
- ⦿ Multiple errors in billing occurred due to the legacy systems in place, making it difficult to maintain fee schedules, thereby resulting in confusion and wastage of effort
- ⦿ They were unable to create the emotional connect between the client and customers resulting in a loss of potential revenue and decrease in the customer base
- ⦿ They wanted to have a competitive edge by enhancing the overall customer experience and deliver tailored products and services to their clients to maintain relationships

## Benefit

With Xelerate in charge of their pricing and billing scenarios, it is now much easier for the client to administer complex fee computations.

Xelerate helped reduce the computations time frame from **8** days to just **1** day. This helped them service their customers better by providing faster responses, providing tailored products and improving the overall transparency, all of which are imperative for investment services

# SunTec™

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SunTec's next generation product suite, Xelerate, enabled the client to overturn its legacy process and helped improve client relationships

Enabled the client to automate its administrative fee calculation process by eliminating multiple legacy silos

Helped achieve customer centricity by providing relationship based pricing and generating automated and on-demand invoices

Enhanced the reporting capability by having extended drill down views to improve the overall transparency

Helped to maintain bill hierarchy for consolidated invoices and statements with standard product work flow and maker checker mechanisms

## About SunTec

At SunTec Business Solutions, we help our clients increase the lifetime value of their customer relationships through effective revenue management and real-time customer experience orchestration. With a legacy of deployments in over 45+ countries, SunTec is a trusted partner to some of the world's leading banks and digital and communication service providers. Headquartered in India, we have our offices in the USA, UK, Germany, UAE and Singapore.

If you wish to explore further on how SunTec can help you achieve customer centricity in your bank, please drop us a mail at [contactus@suntecgroup.com](mailto:contactus@suntecgroup.com) and we will get in touch with you

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