Lead management

Digital channels innovation use case

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ASSISTO CONSULTING INTRO

Assisto Consulting help established companies to move their businesses to new Fintech era, delivering them game changing business capabilities

Assisto focus on the development of brand new analytical and operational solutions using SAS software

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HOLISTIC LEAD MANAGEMENT

Lead scoring

New to the business customers lead generation

Customer Offer Optimization

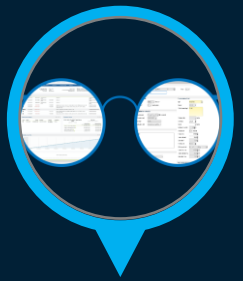
Existing customers base lead generation

Pricing Optimization

Price sensitivity and business potential pricing optimization

Customer Lead Management

Lead nurturing and customer journey Omnichannel management



Augmented CRM

Augmented sales extension & physical channels lead management

Digital sales mastering

Business space based Application process simplification

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COMMUNICATION CHALLENGE

Low frequency contacts with customers

Partnership creation in scarce contact world

Path from casual touchpoints to journey

Customer journey creation and communication

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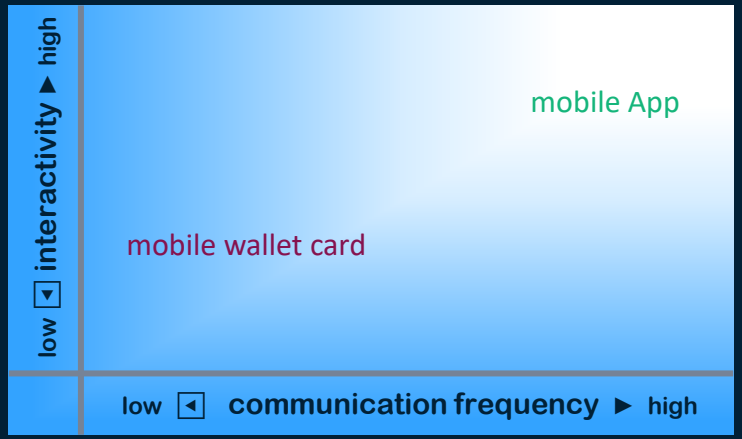
WALLET CARD vs MOBILE APP

Anchoring channels use by interactivity and use frequency



Mobile Wallet Card

- ✓ Non-invasive technology
- ✓ No-barrier access
- ✓ Updated centrally at any time
- ✓ low frequency communication pattern
- ✓ Irregular communication pattern
- ✓ dynamic and simple UI
- ✓ medium interactivity level
- ✓ push notifications

Mobile application

- ✓ Necessity to install application
- ✓ Risk of drop when not used frequently
- ✓ Update initiated by user
- ✓ high frequency communication pattern
- ✓ stable and complex UI
- ✓ high interactivity
- ✓ push notifications

Typical applications

Mobile wallet card – insurance, utilities, transportation, health care, telecommunications

Mobile application – banking, ecommerce, internal applications

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WHERE TO START?

. . . WITH COMMUNICATION!

Please scan me

Mobile wallet card

- ✓ Non-invasive technology – using it when needed
- ✓ No-barrier access – no need for apps installation
- ✓ Customer's pocket guide
- ✓ Easy to be understand and used
- ✓ Instant connection between business and customer

Less then 3 interactions monthly - wallet card is optimal communication channel

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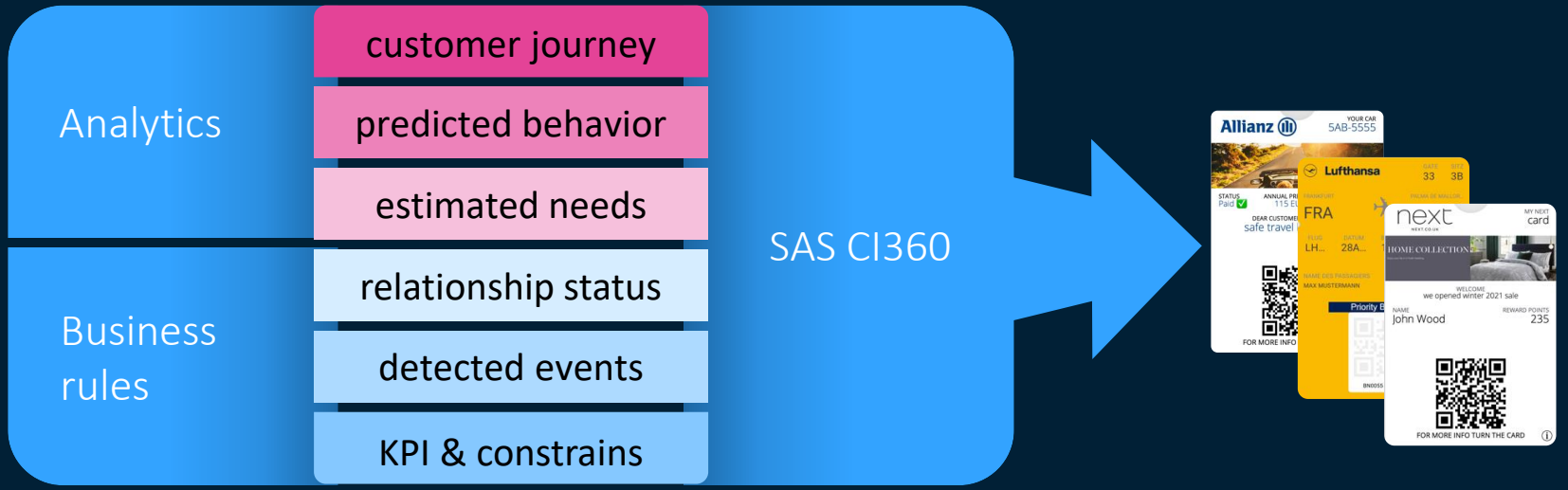
EMPOWERING WALLET CARD

- ✓ Integration of event based reactive, and analytics based proactive communication
- ✓ Customer experience based on information and offer relevancy
- ✓ Communication simplicity driven by customer needs



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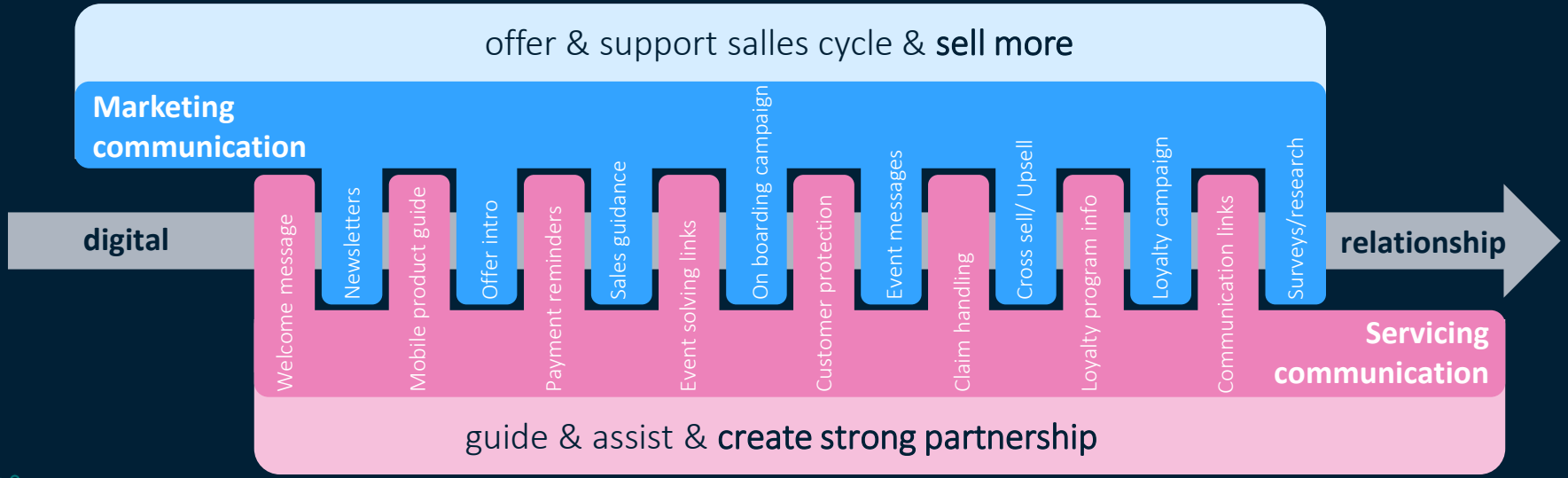
ALL INTEGRATED COMMUNICATION

Relationship is not being build on offerings and sale, but on guidance, assistance and attainability when necessary

Successful offering and sale benefits from strong relationship



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WALLET CARD INTRO

Base use case

- ✓ Up to 10 weeks implementation
- ✓ Card customization management
- ✓ Event feed from CRM, Core system, Claim system etc.

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INSURANCE CUSTOMER JOURNEY KIT

1. New lead’s nurturing
2. Insurance policy welcome pack
3. Servicing event notifications
4. Loyalty programs
5. Up-sell & Cross-sell
6. Claim handling status
7. Payment reminders

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HEALTH CARE CUSTOMER JOURNEY KIT

1. New lead’s nurturing
2. Healthcare guide
3. Medical event notifications
4. Loyalty programs
5. Vaccination pass
6. Payment reminders

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BANKING CUSTOMER JOURNEY KIT

1. New lead's nurturing
2. Express loan welcome pack
3. Servicing event notifications
4. Payment reminders
5. New NBG customers onboarding
6. Collection status
7. Internet banking link

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VACCINATION CUSTOMER JOURNEY KIT

1. New health risk notification
2. Vaccination process guidance
3. Vaccination status
4. Medical appointments reminders
5. Immunity status
6. Public access control

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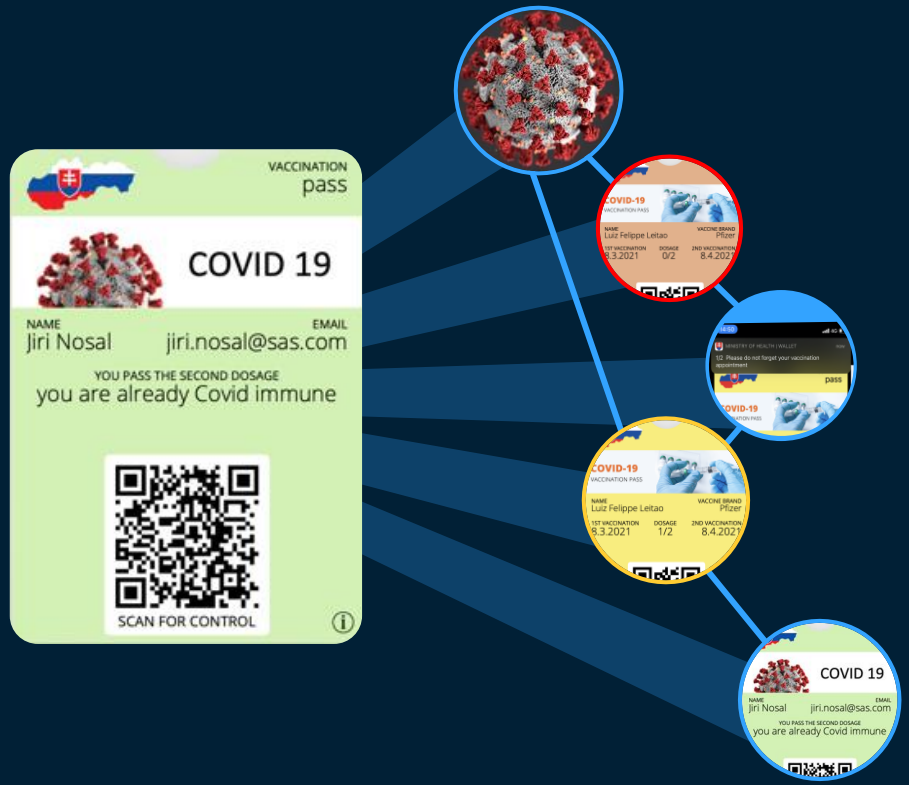

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SOLUTION USAGE

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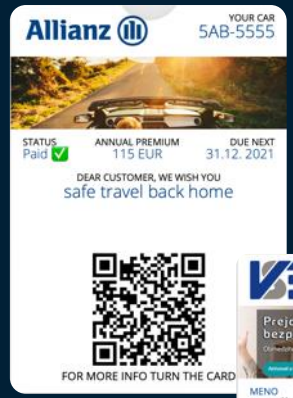
Retail

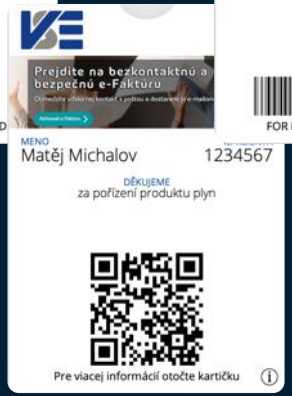
Healthcare

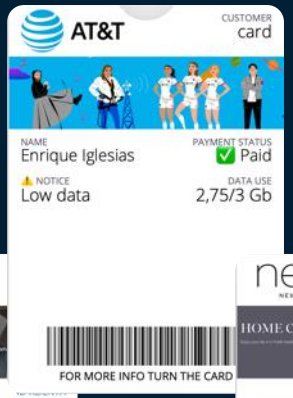
Financial

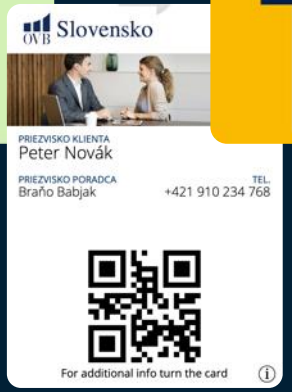
Transportation

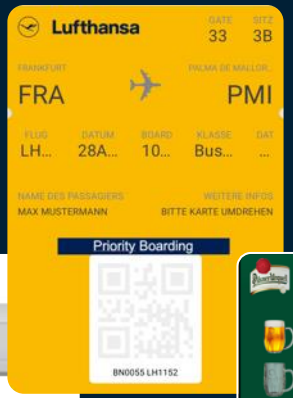
Hospitality

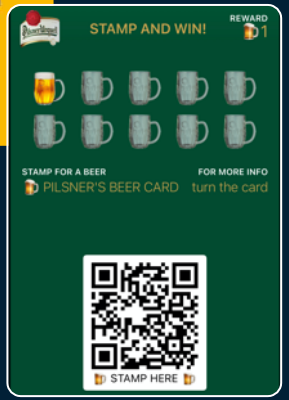












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Thank you

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