

**INFOSYS
RELATIONSHIP
MANAGER
WORKBENCH**

Infosys
cobalt



Overview

Infosys Relationship Manager Workbench is a one stop shop to provide seamless experience for Relationship Managers to enable and enhance their customer facing tasks and activities. While it supports the Relationship Manager's core activities, it offers seamless user experience for them to set up pointed interactions and follow-ups with the necessary customers.

This solution is realized by leveraging Microsoft Low Code Power Platform.

Features of this solution



Landing Page offering a RM function suite



Enables RM to keep in sync with Product Policies



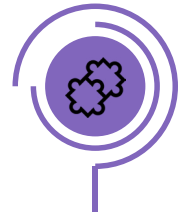
Built in feedback management capabilities



Risk profiling enables for RM to evaluate customers and advice accordingly



Customer and Product information available on demand



Compatible to use from mobile and laptop

Technology Stack



Dataverse



Power Apps



Power Automate



Power BI



Value Propositions

Automation

Easy to use UI with automated workflows.



Enhanced Security

Secure, Cloud based technology.



Low Cost

Built on Low Code App Platform with ease of customization and lower implementation cost.



Compatibility

Composable architecture to plug in-out components and compatible with various CRMs.



Benefits



Seamless user experience for Relationship executives to set up pointed interactions and follow-ups with selected Customers.



Relationship Managers will be able to offer better recommendations to customers as they will be better informed and prepared in relevant interactions. This will help build customer confidence and conviction.



Improved RM productivity enabling focus on key duties. They can do better consultative selling without spending time on accessing various applications or navigate extensively for the necessary customer information.



Robust data model provides flexibility in integration with upstream and downstream interfaces.



Increased Readiness- With easy access to information on products and regulations, RMs will be able to learn and build on their skills. This will help create better and informational conversations with customers.

Applicability of this solution



Banking enterprises looking to equip their customer facing executives such as Relationship Managers with a work support platform.

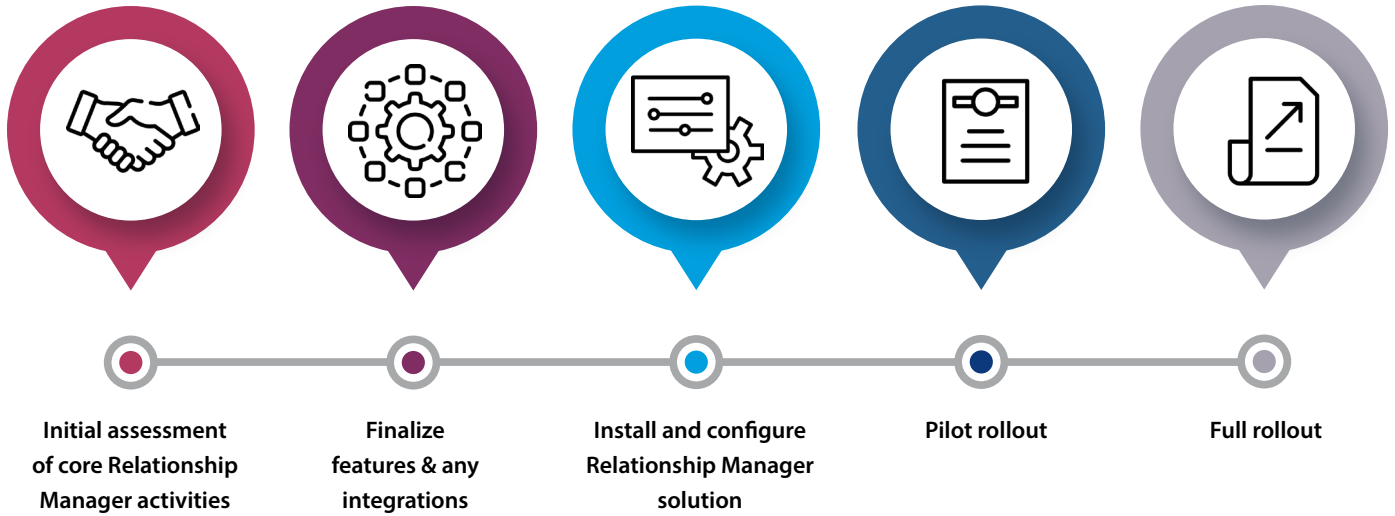


It gives small and medium banks access to inexpensive Relationship Management workbench.



Banks looking for tailored & easy to set up and deploy solution.

Deployment Approach



Infosys Cobalt is a set of services, solutions and platforms for enterprises to accelerate their cloud journey. It offers over 35,000 cloud assets, over 300 industry cloud solution blueprints and a thriving community of cloud business and technology practitioners to drive increased business value. With Infosys Cobalt, regulatory and security compliance, along with technical and financial governance come baked into every solution delivered.

For more information, contact askus@infosys.com

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