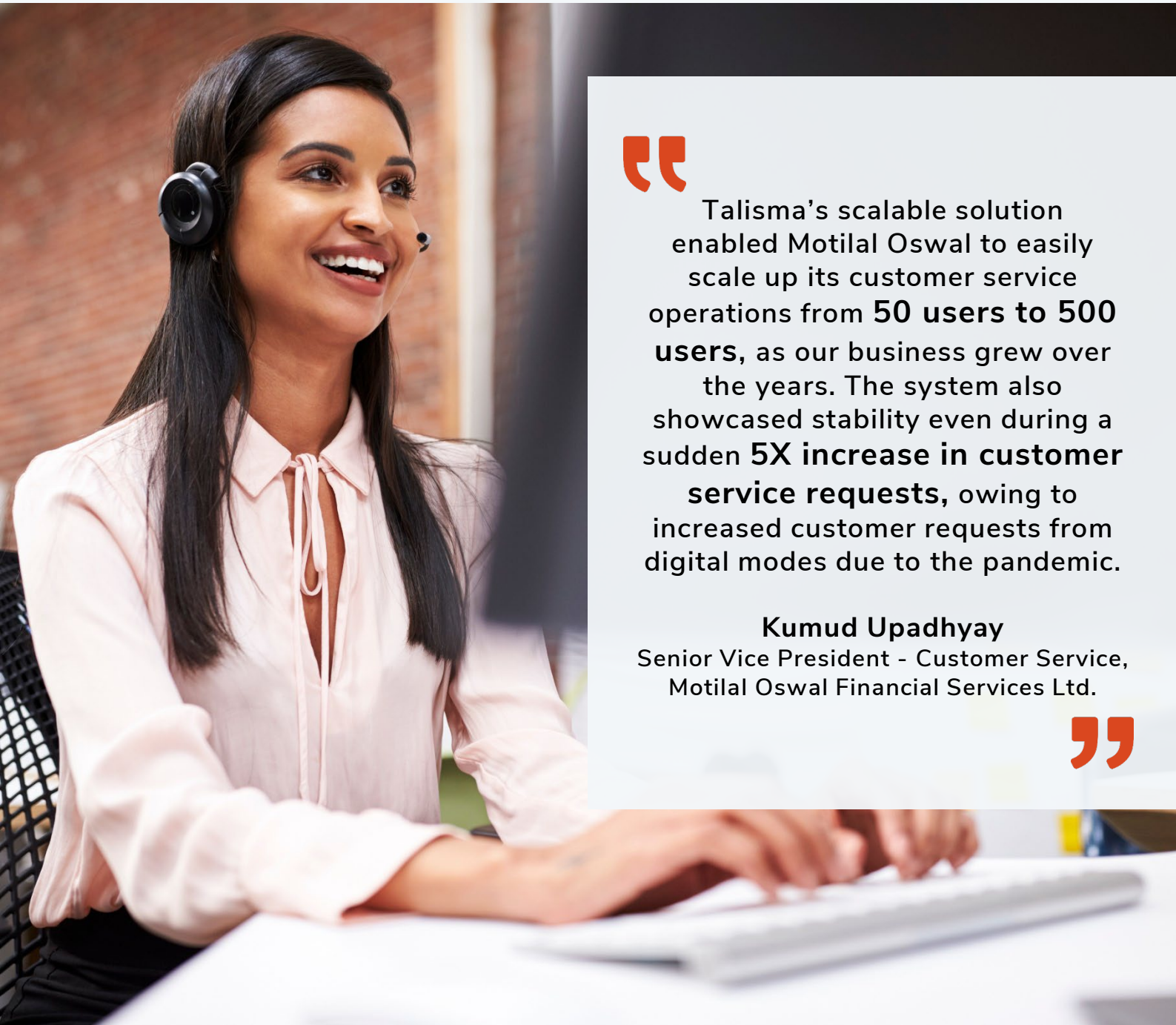


Motilal Oswal Scales Up Customer Service by 5X




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Talisma's scalable solution enabled Motilal Oswal to easily scale up its customer service operations from **50 users to 500 users**, as our business grew over the years. The system also showcased stability even during a sudden **5X increase in customer service requests**, owing to increased customer requests from digital modes due to the pandemic.

Kumud Upadhyay

Senior Vice President - Customer Service,
Motilal Oswal Financial Services Ltd.

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Talisma CRM: Empowering Motilal Oswal's 15-Year Financial Journey

With the support of Talisma CRM's advanced technology and personalized solutions, Motilal Oswal achieved sustained success in the financial industry by effectively managing client relationships and optimizing operational efficiency.



COMPANY TYPE: Public	LOCATION: Mumbai, India	ORGANIZATION SIZE: 5,000+
CLIENT SINCE: 15 Years	USER BASE: 500 Users	TALISMA MODULE: Service Management

Motilal Oswal, a leading financial services firm, has relied on Talisma CRM for 15 years to manage client relationships and enhance operational efficiency. With advanced technology and a personalized approach, Talisma CRM delivered a comprehensive solution tailored to their needs. This enduring partnership enabled seamless communication through integrated email services and sustained success in the financial industry. Talisma CRM's implementation transformed Motilal Oswal's operations with a unified customer view, powerful analytics, and streamlined workflows.

Motilal Oswal's remarkable success story with Talisma CRM serves as a shining example of the transformative impact of adopting a customer-centric approach. By harnessing Talisma CRM's seamless omnichannel capabilities, Motilal Oswal solidified its position as a true leader in the financial services industry, setting new standards for operational efficiency and driving sustainable growth.



Talisma's solution has helped us in multiple areas such as internal communications for in-house processes, customer data integration with multiple databases, managing shareholder and transaction data and regulatory compliance. The solution provided by Talisma has enabled us to seamlessly scale business operations by 10X over the years, handle a 5X increase in customer requests during the pandemic and resolve 90% of customer requests within 4 hours. Overall, Talisma's solution has helped us get a unified view of customer data, enhance customer relationships and develop a structured approach to handle customer support.

Kumud Upadhyay
- Senior Group Vice President
Motilal Oswal Financial Services Ltd



TALISMA™

End-to-end Service Management Solution:

Talisma CRM facilitates all of Motilal Oswal's broking, distribution, insurance and group business activities with a robust service management solution. This platform ensures smooth customer and stakeholder interactions through multiple communication channels.

In-house Requirement Assistance:

Talisma CRM extends its capabilities to support all of Motilal Oswal's in-house requirements. Whether it's internal communication, task management, or collaboration among team members, the CRM system streamlines processes to enhance efficiency within the organization.

Regulatory Compliance Support:

Talisma CRM plays a crucial role in assisting Motilal Oswal with all their regulatory purposes. By offering features designed to maintain compliance and track regulatory-related interactions, the CRM ensures the firm meets all necessary legal requirements.

RTA (Registrars and Transfer Agents) Maintenance:

Talisma CRM facilitates the maintenance of Motilal Oswal's RTAs. The platform efficiently manages data related to shareholders, transactions, and other RTA activities, streamlining processes and ensuring accuracy.

Comprehensive CRM Integration:

Talisma CRM seamlessly integrates with Motilal Oswal's systems, creating a unified platform consolidating essential information. This holistic view enhances decision-making by providing insights into customer interactions, fostering efficiency and personalized financial solutions, and boosting performance in the competitive financial industry.

Unified Customer Data:

Talisma CRM consolidates all customer data in one centralized platform, providing Motilal Oswal with a comprehensive view of each client's interactions, preferences, and history. This streamlined access to information allows for a deeper understanding of customers and enables more personalized and targeted financial solutions.

Scalability & System Stability:

Talisma's scalable solution enabled Motilal Oswal to easily scale up their customer service operations from **50 licenses to 500 licenses**, as their business grew over the years. Also, owing to increased customer requests from digital modes due to the pandemic, a **5X increase in customer service requests was handled seamlessly** by the system.

Enhanced Customer Relationship:

As a customer-centric organization, Motilal Oswal emphasizes building strong relationships with its clients. Talisma CRM facilitates this objective by enabling a seamless and effective tagging system, ensuring personalized and attentive interactions with customers.

Talisma's seamless integrations with both legacy as well as new systems enabled Motilal Oswal to **resolve 90% of customer queries within 4 hours**. This has led to increased customer satisfaction.

Integration with Regulatory Requirements:

Talisma CRM offers integrations that cater to the regulatory requirements of Motilal Oswal's customers. By aligning with regulatory guidelines, the CRM ensures compliance and helps maintain a trustworthy reputation in the financial services industry.

