

# Financial Services Investigation



# Initial Situation

## Client's Needs

- The existent competitiveness in the financial market poses the need of a credit and consumption habits investigation for potential clients, speeding up the internal processes of the entity, minimizing the risk and maintaining the growth rhythm.
- Evaluate potential clients of different socioeconomic strata, which are later classified to obtain a financial product adequate to their profile.
- Validation of confidential data, through a team of highly qualified and involved people to offer quick service and keep strictly confidential rules.
- Being a support team to the sales area, creating a strategic alliance in placing and validating financial products.

## Keys to Success

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- Adequate information system introduction to the needs of the Project, achieving the required information attraction by the client, making this way an efficient analysis and validation of the information.
- Combined use of applications, developed in the Call Center and by the client, optimizing in this way the working tools with which both entities rely on. Eliminating the human criteria for the classification of clients.
- Fulfillment of policies developed for analysis of validation of clients, achieving therefore a reduction of risk percentage of derived tardiness because of bad sales; taking into account aspects like salary range, credit references, debt levels, etc.
- Operations time management by work investigation, attaining an effective goal achievement.
- Constant training for the data analysts, in objection management and customer service.
- Strict quality control of processes management, attaining in this way the fulfillment of policies and outlines required by our clients, like the quality of our services and calls.

## Obteined Results

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- In being a strategic ally in the validation of clients for the obtainment of a financial product, we have contributed in the growth and leadership of our clients.
- Qualitative selection of clients, by means of a process, in which we evaluate if the client fulfills with all the established requirements to obtain a financial product.
- Productivity increase in global results and by analysts in a 50%.
- Result delivery in established time, which allows the satisfaction of the client.