

CASE STUDY

Transforming the sales crediting experience for a hi-tech leader

A legacy system proved massively frustrating for this company's sales team until Genpact came along

WHO WE WORKED WITH

A Fortune 500 manufacturer of networking hardware, telecommunications equipment, and other technology products

WHAT THE COMPANY NEEDED

To alleviate the pain of its hardworking sales agents by making it easier for them to receive proper credit for their work

HOW WE HELPED

We designed a new user experience for the company's sales agents with a few simple tweaks and tools that vastly improved the existing system

WHAT THE COMPANY GOT

A much happier sales team, thanks to new workflows and processes that streamlined and updated the entire sales process and made it scalable

CHALLENGE

Revamp an inefficient, awkward, 14-year-old sales management system

For many sales agents, the company's sales crediting process was a nightmare. Bookings came through on one system, while sales agents accessed and received these account assignments on a different system. This disconnect and misalignment created major issues. All too frequently, the sales agents weren't properly credited for their work.

Correcting and making claims against these errors proved a massive pain point. The agents were making about 70,000 such claims every year - 13% of all bookings - and the 14-year-old legacy system handling the claims process just wasn't up to the task. It was bad enough that agents were spending an estimated 85,000 person-hours annually chasing misallocated bookings and initiating claims. It was worse still that the system rejected many perfectly valid claims.

SOLUTION

Evaluate the system's issues, then deploy the perfect tools to fix them

As a first step, Enquero, a Genpact company, thoroughly assessed our client's business model. The team quickly determined that the major reason it took so long to approve claims was that to make and track claims, sales agents had to toggle between the two systems. The Enquero team concluded that the only way to scale up so

claims could be resolved faster was to bring in new, tailor-made tools to address the issue.

Here's what we did:

- We put to work an enhanced version of Pega. Pega is an easy-to-use platform that reduces the number of applications and systems a business needs. We used Pega to create a workflow that vastly sped up the approval process
- We created a single view - and a single source of truth - that visually linked bookings and claims
- We transformed sales agents' user experience by bringing in Elasticsearch, a state-of-the-art search and analytics engine. As a result, sales agents could easily find orders and place the claims associated with them in carts

IMPACT

A great leap forward for the claims process

The newly integrated system helped every stakeholder, including the finance team and field operations, resolve and manage claims quickly and smoothly. The system even provided tips on how to prevent wrong claims - and that went a long way to resolving conflicts. The numbers tell the tale:

- Claim rejections were slashed from 20% to less than 5%
- Sales agent satisfaction scores more than doubled from 4.2 to 8.9
- The time sales agents spent on claims plummeted from 85,000 to 20,000 person-hours

Bottom line: The sales agents' morale has never been higher, and they're far more productive, too, as they focus on the job at hand - delivering value to the company.

About Genpact

Genpact (NYSE: G) is a global professional services firm that makes business transformation real, driving digital-led innovation and digitally enabled intelligent operations for our clients.

Get to know us at [Genpact.com](https://www.genpact.com) and on [LinkedIn](#), [Twitter](#), [YouTube](#), and [Facebook](#).

