



FundsIndia redefining customer engagement in the financial service domain with SalesIQ

About FundsIndia:

Founded in 2009, FundsIndia is a financial service firm specializing in four primary investment products: mutual funds (their primary product), stocks, corporate fixed deposits, and NPS. In the crowded online investment market, FundsIndia differentiates itself by offering their platform as well as investment guidance services.

Running successfully for nearly a decade and a half, FundsIndia pulls in ~200K monthly organic traffic and serves more than 2.5 million customers.



"Before having the idea of live chat, everything was via emails and tickets. Nothing was immediately solvable. It might take two or three days to reply to an email or close a ticket, but once we onboarded SalesIQ, 30% of the queries that come via email or tickets are solved immediately."

- Ashwath, CRM Executive, FundsIndia



CHALLENGES FACED

- FundsIndia is an investment platform service that also provides guidance service, so attending to customers on time is crucial.
- Building trust with the visitors who'd be investing their money in the platform is not an easy process as they'd expect instant communication access with the advisors.

On top of these things, having four product offerings complicated their process as each product has a different set of customers, and some customers might be subscribed to multiple products.

To connect customers with the advisors manually, their customers have to go through an identification process where they'd have to spend a lot of time, and

an agent has to transfer them to the respective advisors. It wasted both their customers' and agents' valuable time.

Also, FundsIndia wanted to create a personalized experience for their customers for each of their four products, which would be a huge task when done manually.

HOW Zoho SALESIQ HELPED FUNDSINDIA

When FundsIndia, a long-time Zoho One user, realized they needed a live chatbot for their operation, they immediately implemented Zoho SalesIQ in their business. Ashwath from FundsIndia says onboarding SalesIQ to their organization was simple and straightforward.

Initially, they just had a simple, live chatbot they employed to offer easier and faster communication to their customers. But as their customer base increased, their challenges increased too.

To address the challenge of chat routing, FundsIndia integrated SalesIQ with Zoho CRM. So when a customer enters the live chat, the bot will search their email address in CRM, pull their respective advisor's info, and automatically connect the customer to the advisor.

By automating this time-sensitive process, **FundsIndia saved 35-40% of their support agents' time and served their customers a lot better and faster.**



WHAT ELSE IS FUNDSINDIA DOING TO ENHANCE ITS CUSTOMER EXPERIENCE WITH SALESIQ?

FundsIndia also onboards their customers via SalesIQ's [live chat](#). They've listed their product offerings in the chat, and visitors can select if they're an existing customer or a new one. When they choose that, it'll directly take them to the onboarding team; they'll be converted into a lead and might be an investor in the future. Though onboarding customers via SalesIQ's live chat currently accounts for a small number, they're planning to expand it in the coming days.

When asked to shed more light on how this works, Ashwath explains, "We have different flows from where the visitor becomes a registered customer with us. Two of those flows are automatic, one of which is being handled manually, where the customer is required to enter all the details, such as PAN, attaching documents, etc.

"Around 2300 new clients have been onboarded via SalesIQ's live chat in the past three months, where we onboard a total of 10,000 users per month from all the sources as a whole."

- Ashwath, CRM Executive, FundsIndia

Some customers will not be sure of how to do it technically. They may need assistance from us to do the process. With SalesIQ's live chat, we're able to assist and onboard them."

An avid user of the [SalesIQ + Desk integration](#), they receive more than 70% of their queries in Zoho Desk.

RESULTS



Saves 35-40% of their agents' time



Average response rate dropped from 2-3 days to less than 4 minutes



Solves 30% of their queries via SalesIQ's live chat



Lead-to-conversion ratio: ~20%



Onboarding via chatbot: 7.66%



Average chats/month: ~8K



FUNDSINDIA PLANNING THEIR FUTURE WITH ZOHO

When talking about their future plans with SalesIQ and Zoho, FundsIndia is in the process of developing a diversified FAQ answer bot without an Autopilot card to amp up their bot.

Check out our [solution article on financial services](#) if you'd like to learn what else SalesIQ can do for the finance domain.



"SalesIQ's integration with Desk is very, very helpful. Our agents don't have to go to the Desk and create a ticket manually. The tickets will be created automatically. Also, the old ticket from the customer will be visible on the side, which is very helpful for learning the past interactions they've had with the customers."

- Ashwath, CRM Executive, FundsIndia

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Zoho SalesIQ is an all-in-one live chat and analytics platform for marketing, sales, and support teams. Built for small and mid-sized businesses, Zoho SalesIQ offers digital customer engagement platform to communicate with visitors at every stage of the customer lifecycle. Initiate the right kind of conversation at exactly the right time.

www.zoho.com/salesiq

