bitmist

sales process automation & CRM implementation

INTELLIGENT AUTOMATION | SALES | FINTECH | LOW HUMAN TOUCH

simplepay
by otp Mobil

salesforce **PARTNER**
SINCE 2015

our story in a nutshell

SimplePay is an online payment provider, a part of the OTP Group, and theirs is a remarkable success story in the Hungarian fintech sector. SimplePay is a market leader in Hungary with over 5,000 active clients. A sales team of 10 is complemented with another 20 professionals in the other departments in support roles. IT, Risk and Finance are involved in the sales processes.

The online system developed and operated by the SimplePay team enables fast, secure and convenient online shopping experience for the customers of their B2B clients (e-traders, online stores).

You may often encounter this payment option on the Foodpanda platform if you pay with card.

In this case study, we present the joint project of Bitmist and SimplePay in three parts. It was a complex and exciting challenge, we extremely enjoyed the work together and learned a lot from it. We hope you can use our learnings in your work!

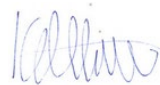**The solution was implemented in the scope of 4 rapid projects:**

- sales process automation and CRM implementation

- customer segmentation, pricing and offer automation

- smart RFP portal (Bisnode, KYC)

- digital signature and paperless office

We enhanced the standard, turnkey solutions according to the special demands of SimplePay.

This case study presents the details of Project 1 implementation

ISTVÁN KELLÉNYI   GÁBOR KISS
FOUNDERS, CRM AUTOMATION EXPERTS

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our story in a nutshell

8
WEEKS

was required only to deliver the CRM solutions developed in the first round of process optimisation and rationalisation.

10
WEEKS

was how long it took for leads to get from the first inquiry to contracting by the end of our story instead of several days as was the case previously.

85%

of the lead management process is automated. Previously, this was less than 10%.

99%

of the fully KYC process is automated Each new company had to be verified one by one before.

executive summary

PART I: SALES PROCESS AUTOMATION AND CRM IMPLEMENTATION

The sales processes at SimplePay were initially very slow and too complicated.

This resulted in leads attrition and negative customer experience.

First we eliminated time consuming manual data entry and rationalised data requests, breaking up the process into single steps that was the basis for configuring Salesforce CRM..

We established a user-friendly portal (also on the Salesforce platform) to simplify customer registration and requests for quotation**, registering customer data directly in CRM, i.e. ready for the sale team.**

We automated 60% of the sales processes in the first stage so the same team could manage many more new leads.

Administration got faster, manual data input reduced, consequently a lot of room for errors was eliminated. W**e began to prepare the landscape for the single CRM and sales platform to gradually take the place of good old Word templates and Excel sheets.**

The details of the project progress are coming up in the next parts of the case study.

CLICK HERE TO READ THE NEXT PARTS OF THE OTP SIMPLEPAY AND BITMIST JOINT PROJECT:

PART II.   **PART III.**

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the challenge

WHAT WERE THE PROBLEMS WE AIMED TO SOLVE?

Sales and customer management processes at SimplePay were very cumbersome.The sales team spent most of their time with administration owing to manual data entry instead of focusing on their actual work and customers.

Leads contacted SimplePay by e-mail. Many e-mails were lost or landed in the spam folder – on both sides. **The sales force used a complicated Word template** to answer successfully received inquiries.

The data requested in the template were **not necessarily required for quotations, and customers were often perplexed by the specific technical details**. This resulted in lengthy calls, and hours or even days were lost with data reconciliation.

The team conventionally used Office for data processing, and the sales reps received no updates on the status of the offers.

The baffling, incomprehensible tables lead to leads churn. Most of the sales force's time was consumed with tasks that could be automated. Important calls and tasks got out of mind.

This meant a direct route to negative customer experience.

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the solution

CUSTOMER MANAGEMENT PROCESSES STREAMLINING, PROFESSIONAL CRM, REAL-TIME REPORTING AND SALES AUTOMATION

We started the project by optimising the sales process. It was imperative to reduce manual data inputs.

We divided the application process into four stages to also facilitate data entry for prospects, and to request **much less, only relevant data from new leads in all stages.**

Technically speaking, the goal was to standardise the internal sales and quotation process:

- Salesforce CRM implementation

- Registration portal development

The portal forwards applicants' data directly to the sales team. Accounts for new customers are generate **in real-time in the CRM where the sales team can monitor custo mer activities.**

The customisation of Salesforce moved the whole sales workflow away from the maze of e-mails and calls to a sleek, transparent platform.

„This is how we like collecting new customer data.
Automated, potential mistakes eliminated, involving the least possible human touch."

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results

The 3 major project outcomes:

- Transparent and faster sales

- Common platform with the other functions
- Decrease of leads churn

Sales processes and customer management became markedly faster and more efficient. Masses of admin tasks were automated to reduce manual data input**.**

Sales team members **can access all required information** in a single system about the companies that approach them.
The platform is streamlined, user friendly and thinks ahead. Task owners receive reminders of their to-dos and calls.

Communication between the functions became faster and more efficient. Joint work was based on a check list that helped find our way in the sales process steps. **This led to much lower leads attrition and improved customer experience.**

Goodbye, unnecessary administration! Hello, new customers!

Since reporting relies on real-time date, the system provides full insight for managers to the pipeline, ensuring accurate forecasting to support decision-making and sales managers' work.

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do you like our story?

More customers? Yes. More efficient pro-cess management? Yes. Increasing profit? Yes. With an increasing number of new contracts? Yes. All this automated wher-ever possible to rule out potential errors? Exactly. Minimised manual data entries? Like this.

CONTACT US IF YOU HAVE ANY QUES-TIONS ABOUT THE SOLUTION!

I WANT TO GET IN TOUCH!

PART II.   **PART III.**

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