CASE STUDY

# Leading Automaker's Financial Services Division Transforms Customer & Employee Engagement

TECH mahindra

## Overview

With a legacy application landscape, the customer faced issues with "connecting the dots" across end-customer interactions and building an integrated view of its end-customers over the vehicle financing lifecycle seemed challenging. We designed a Salesforce-based solution tailored to the customer's exact requirements, leveraging the platform's out-of-the-box features with some level of customization.

Our solution includes comprehensive CRM, self-service and collections modules that improve operational efficiency and reduce manual work while elevating the overall user experience.

## Client Background and Challenges

The client is the captive financial services arm of a leading Japanese automaker in the Australia–New Zealand region, generating nearly USD 700 million in annual revenue and managing over 200,000 financed vehicles.

Until recently, they relied on legacy systems to manage vehicle loans and leases—a setup that became increasingly difficult to maintain and enhance over time. This led to several challenges:

- The customer was using a legacy CRM platform for their interactions leading to errors, higher lead times and increased involvement of people, with a great degree of manual work

- Basic CRM setup supplemented by Excel workbooks and manual processes led to reporting challenges with audit and compliance risks

- Customer self-service capabilities were absent, forcing customers to call or email support for loan and lease management

## Our Approach and Solution

A Salesforce solution that integrated self-service, servicing and collections into one unified operations platform with the following features:

- **Customer portal built on Experience Cloud:** Enables management of loans and leases through self-service, putting greater control into the customers' hands and reducing workload on back-office teams.

- **Servicing and Collections on Service Cloud:** Handles CRM operations (request management, dispute resolution, customer loyalty, etc.) and collections (strategy, risk categorization, follow-ups, notices) using 90% OOTB features.

- **Integrated messaging rules engine:** Configurable to meet local regulations on contact frequency and limits.

- **Integrated Customer360 application:** Provides comprehensive view of customers, contracts and assets.

## Business and Community Impact

- **Improved operations efficiency:** Bringing in near-complete automation has resulted in reduced manual efforts for the servicing, operations and collections teams, leading to USD 2 million of savings over 5 years.

- **Accelerating digital adoption:** Introducing Salesforce to automate a large share of internal processes paved the way for faster adoption of digital platforms within the organization.

- **Higher solution scalability:** Unified platform supports up to five times the current customer base without additional headcount.

- **Sustainability:** Process digitization and reduced paperwork has contributed to reducing physical document archival requirements and lowering the client's carbon footprint.

## About **Tech Mahindra**

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