

A New-age Fintech company responds to every new lead in 15 minutes or less.

Industry: Fintech

Geography: India

Association Since: 2017

About ClearTax

More than 3% of tax returns in India are filed via the fintech company's website and mobile app. It is also used by CA firms, businesses, and enterprises across the country.

Challenge:

Without a dedicated calling solution, reaching out to leads, responding to inquiries, and documenting each call was getting difficult for the company. And the volume of leads was not helping either. Longer wait times and high abandonment rates started to affect the customer experience.

Besides, when there was a sign-up on their website, it used to take nearly 24 hrs to establish the first touchpoint. The primary reason behind this was lack of automation, poor dialing functionality, and manual Call Detail Record (CDR) management, whereas consequences being poor agent productivity and lesser conversion.

The Ozonetel Impact:

After testing numerous other solutions, it chose **Ozonetel** to power the customer experience because of its architectural flexibility and extensive experience in the cloud telephony industry.

With thousands of calls made and received every month at the company, Ozonetel equipped agents with smart dialers to get more time with live leads & prospects and less time managing CDRs. Faster revert to leads and prospects when the brand recall is fresh makes lead conversion easier and faster. It could not only thrive on the faster response time but also automated business critical events such as onboarding, payment reminders, renewals etc.

The company turns visitors into customers by automating various touch points and communicating in a timely, personalized, and contextual way.



CTI Integration with LeadSquared:

Ozonetel's integration with LeadSquared allowed agents to work within the LeadSquared CRM window to access all relevant information about the callers, including click-to-call functionality for faster outbound calls. The integration enabled:

- ✓ Powerful **auto dialing** functionality
- ✓ Click to call using lead Activity Stream
- ✓ Click to call using the lead details page
- ✓ Have Call Recordings in LeadSquared CRM using Ozonetel connector

This improvement in calling functionality helped **the company** attend the queries faster, thereby increasing caller satisfaction. The integration also ensured the calls made through Ozonetel are passed back to LeadSquared CRM along with the call details and recordings for future references.

Ozonetel's CTI integration with LeadSquared checked off the team's most critical requirements, i.e., reliably displaying caller information with click-to-call functions and sending the recordings back to LeadSquared. The result was faster outbound campaigns and unbelievably short agent wrap times.

Customer touchpoint reduced from 24hrs to 10 minutes

You read it right. Earlier, the agents were spending a large chunk of productive time in manual calls and CDR management. Whenever there was a sign-up, the team used to take approximately 24 hrs to establish the first touchpoint. Similarly, the first communication to a marketing lead used to take 3-4 hours. Ozonetel-LeadSquared integration helped the team automate the workflows with the first contact time frame reducing to 10 minutes for customers and 15 minutes for marketing leads.

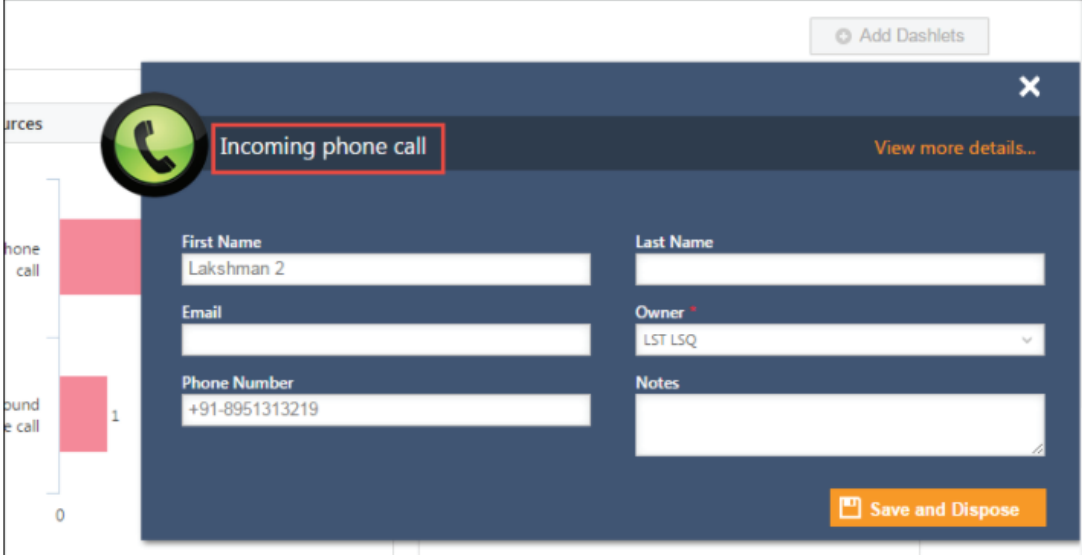
The integration empowered **the company** with greater control over service level and more conversions.

Thriving on Ozonetel's powerful [progressive dialing](#) functionality, **the company's** agents could connect with more customers & leads, increasing conversion rates. No manual dialing resulted in improved agent productivity and more successful outbound campaigns.

With Ozonetel, the agents spend more time helping customers and less time searching for information and logging notes.

Integration benefits at a glance

Screen pop for personalized greeting

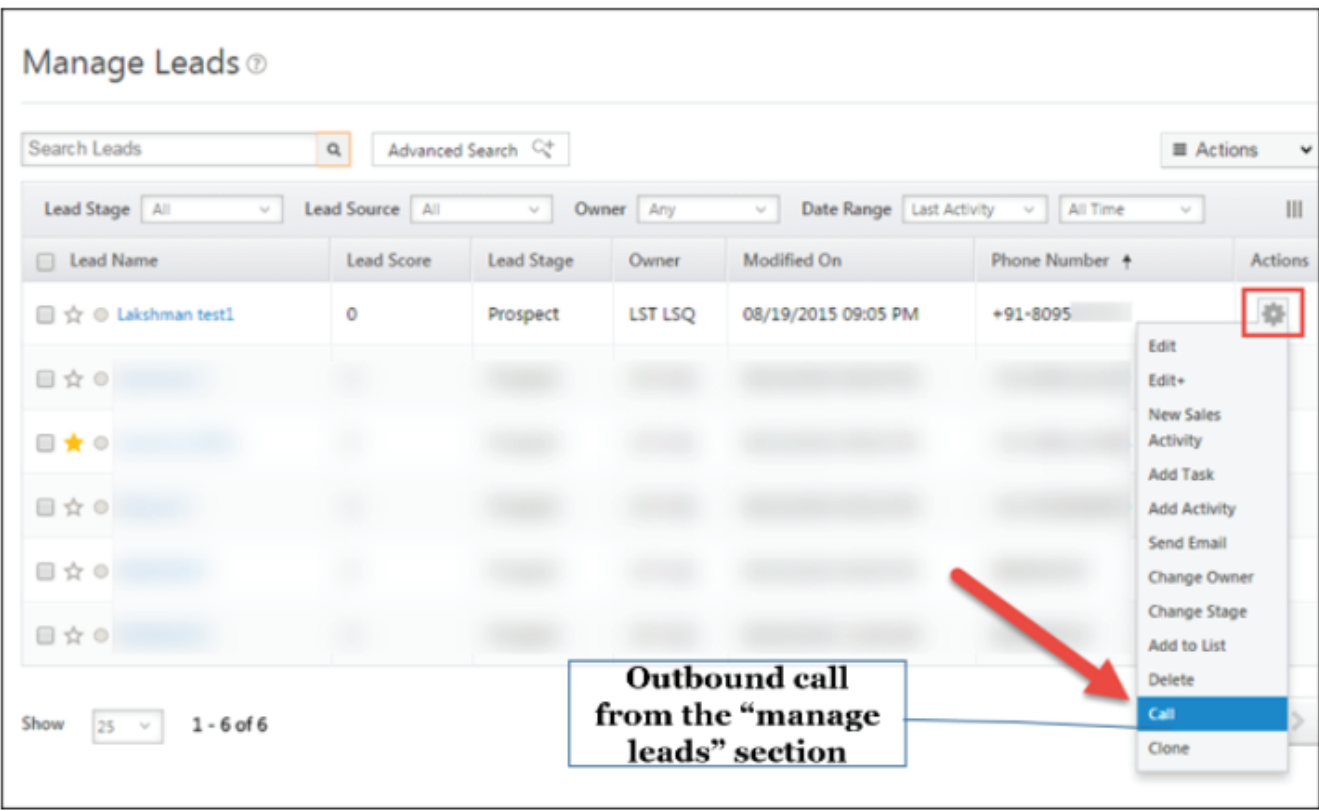


The screenshot shows a CRM interface with a sidebar on the left containing a 'Sources' section and a list of call types: 'Phone call', 'Outbound call', and 'Bound call'. A 'Phone call' entry is highlighted in pink. A modal window titled 'Incoming phone call' is open, displaying the following information:

- First Name:** Lakshman 2
- Last Name:** (empty field)
- Email:** (empty field)
- Phone Number:** +91-8951313219
- Owner:** LST LSQ (dropdown menu)
- Notes:** (empty text area)

At the bottom right of the modal is an orange button labeled 'Save and Dispose'. A 'View more details...' link is visible in the top right corner of the modal. The background interface includes an 'Add Dashlets' button in the top right.

Outbound calls from the LeadSquared CRM page



The screenshot shows the 'Manage Leads' interface in LeadSquared CRM. At the top, there's a search bar and filters for Lead Stage, Lead Source, Owner, and Date Range. Below this is a table of leads. The first lead is 'Lakshman test1' with a score of 0 and stage 'Prospect'. An action menu is open for this lead, showing options like Edit, New Sales Activity, Add Task, Add Activity, Send Email, Change Owner, Change Stage, Add to List, Delete, **Call**, and Clone. A red arrow points to the 'Call' button. A text box with the text 'Outbound call from the “manage leads” section' has an arrow pointing to the 'Call' button.

Manage Leads

Search Leads [] Advanced Search [] Actions []

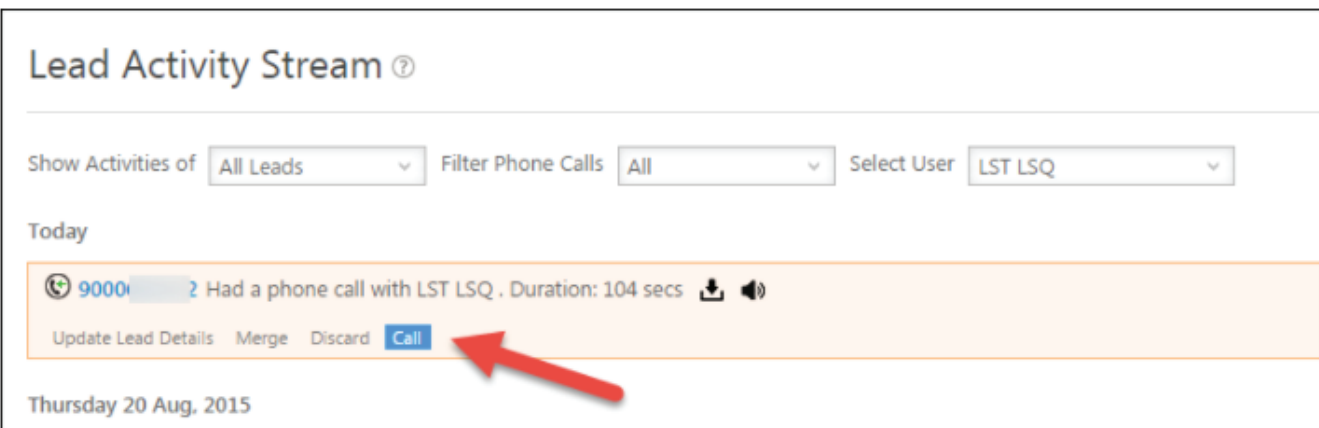
Lead Stage: All Lead Source: All Owner: Any Date Range: Last Activity All Time

Lead Name	Lead Score	Lead Stage	Owner	Modified On	Phone Number	Actions
Lakshman test1	0	Prospect	LST LSQ	08/19/2015 09:05 PM	+91-8095	<ul style="list-style-type: none"> Edit Edit+ New Sales Activity Add Task Add Activity Send Email Change Owner Change Stage Add to List Delete Call Clone

Show 25 1 - 6 of 6

Outbound call from the “manage leads” section

Agents can click to call using Lead Activity Stream



The screenshot shows the 'Lead Activity Stream' interface. It has filters for 'Show Activities of' (All Leads), 'Filter Phone Calls' (All), and 'Select User' (LST LSQ). Below the filters, there's a section for 'Today' with a call activity entry: '9000 Had a phone call with LST LSQ . Duration: 104 secs'. Below this entry are buttons for 'Update Lead Details', 'Merge', 'Discard', and **Call**. A red arrow points to the 'Call' button. The date 'Thursday 20 Aug, 2015' is shown at the bottom.

Lead Activity Stream

Show Activities of: All Leads Filter Phone Calls: All Select User: LST LSQ

Today

9000 Had a phone call with LST LSQ . Duration: 104 secs

Update Lead Details Merge Discard **Call**

Thursday 20 Aug, 2015

Agents can click to call using Lead Details Page

Lead Details ?

← Back

Lakshman
+91-825661219

Click here to initiate a call with the lead

Prospect **0** **0**
Lead Stage Lead Score Disengaged

Lead Source : Inbound Phone call
Lead Age : 1 Days
Lead Owner : LST LSQ

Activity History

Notable Activity Type: All

Aug 2015

19 06:25 PM Had a phone call with LST LSQ. Duration:12 se

Activity History >

Inbuilt Call Recordings in LeadSquared CRM using Ozonetel connector

leadSquared DASHBOARD CONTENT MARKETING LEADS APPS

Lead Activity Stream ?

Show Activities of: All Leads Filter Phone Calls: All Select User: LST LSQ

Today

900C Had a phone call with LST LSQ . Duration: 104 secs [Download] [Play]

Update Lead Details Merge Discard Call

Thursday 20 Aug, 2015

900C Had a phone call with LST LSQ . Duration: 178 secs [Download] [Play]

Update Lead Details Merge Discard Call

7:51 PM

Lead Activity Stream
View lead activities as they happen

Manage Leads
Manage leads and notable activities

Manage Lists
Organize your leads by creating static and dynamic lists

Smart Campaigns with IVR ensured Zero Resource Wastage

The company conducts webinars, online sessions, and other activities to educate audiences on easy income tax filing, how to stay compliant with changing policies, and more. These being a part of the marketing campaigns, it effectively promotes all upcoming webinars, training, and consultation sessions with **smart IVR blasts**. The IVRs created by Ozonetel's drag & drop interface guided thousands of customers and prospects on easy onboarding resulting in faster resolution of issues, increased inbound leads, and improved customer experience. The team also used IVR blast to confirm payments made by customers.



Ozonetel has a rich set of features that comes to their full potential with the right CTI integrations. With LeadSquared, the two solutions just talk.

Sharath Bhandari
 Sr. Manager-Business Process Management

Success Story Snapshot

Industry	Fintech
Challenges	<ul style="list-style-type: none"> - Manual dialing - Longer agent wrap times - Longer waiting periods - Ineffective outbound campaigns - Poor agent productivity
Features used	<ul style="list-style-type: none"> - Auto Dialers - Progressive dialers - Click-to-call
Results	<ul style="list-style-type: none"> - First touch-point time frame reduced from 24 hrs to 10 mins - 3X more effective outbound campaigns - 30% more productive agents
Sweet Spot	Ozonetel-LeadSquared Integration
Ozonetel Advantage	<ul style="list-style-type: none"> - 99.9% uptime - Dedicated Account Manager - Fastest response time in the industry

About Ozonetel

Ozonetel offers an omnichannel contact center solution to help fast-growing, customer-centric businesses build a better customer experience. We provide one of the world's most adaptable, flexible, comprehensive contact center suites. But more importantly, we pride ourselves on our helpful, personalized consultative approach to ensuring every client can build efficient systems and a better customer experience.

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