


DATAMATICS

**CUSTOMER MANAGEMENT
SOLUTION FOR THE
BANKING INDUSTRY**





The banking industry is undergoing a rapid digital transformation, driven by rising customer expectations, advanced technologies, and the need for secure, seamless experiences. Datamatics offers a comprehensive suite of customer experience (CX) solutions that span the entire banking customer journey—from discovery to loyalty. By leveraging AI, automation, analytics, and personalization, these offerings enable banks to enhance engagement, build trust, drive cross-sell opportunities, and ensure long-term customer retention while staying ahead of evolving market trends. With a strong focus on innovation and customer-centricity, Datamatics empowers banks to create smarter, safer, and more rewarding interactions at every stage of the journey.

CX OFFERING ACROSS CUSTOMER JOURNEY

Discovery

- Insights
- Sentiment analysis
- Heatmaps
- Segmentation
- Surveys
- Analytics

Research & Comparison

- Funnel analysis
- Benchmarking
- CRM Integration
- Personalization
- Chatbot

Account Opening & Onboarding

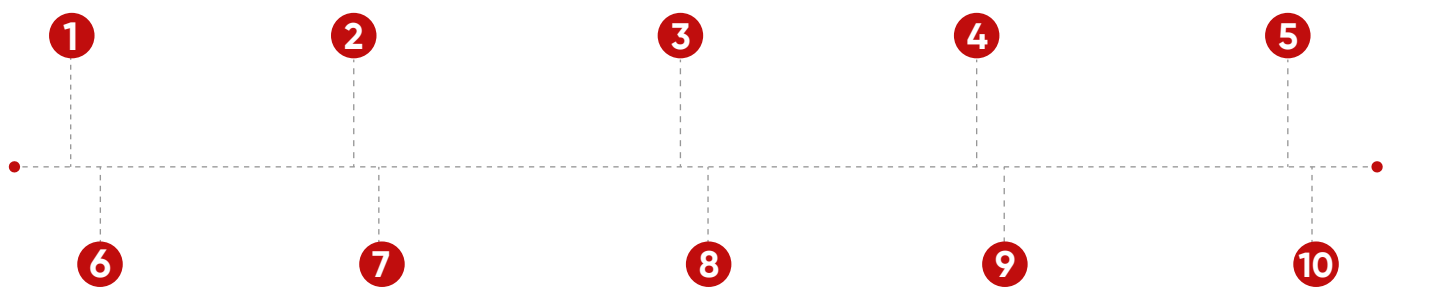
- Notifications System
- Employee workflow management
- Process Tracking
- Communication portals
- Analytics & Reporting

Engagement & Transactions

- Voice control
- Payment Gateway integration
- Credit Rating Analytics
- Data Dashboards
- Intelligent document processing

Support & Assistance

- Conversational AI
- 24/7 Multilingual support team
- Ticketing
- Troubleshooting for online banking



Cross-selling & Upselling

- Email campaigns
- Predictive Analytics
- Loyalty programs
- Dynamic pricing

Statements & Financial Reporting

- Balance updates
- Portfolio Tracking
- Reporting dashboards
- Tax Forecasting
- E-statements

Customer Satisfaction & Retention

- Satisfaction surveys
- NPS surveys
- Journey mapping
- Proactive outreach
- Sentiment analysis

Fraud Detection & Prevention

- Real-time alerts
- AI-ML based pattern analysis
- Biometric & Two-Factor Authentication

Loyalty Programs & Rewards

- Loyalty programs
- Milestone rewards
- Discounts & promotions
- Gamification
- Referral programs



Datamatics CX is built to solve problems for enterprise brands all over the world, including leading banks and financial institutions. The business impacts we deliver to our banking clients are typically realized immediately and can be measured by the following outcomes:



Elevated CX:

Delivering personalized, seamless, and digital-first experiences strengthens customer satisfaction, loyalty, and lifetime value in banking.



Operational Efficiency:

Automation, AI-driven workflows, and streamlined processes accelerate transactions, reduce errors, and improve service delivery.



Scalability:

Flexible banking platforms adapt to fluctuating customer demands—whether onboarding new clients, handling peak transaction volumes, or scaling digital channels—without compromising service quality.



Cost Reduction:

Strategic outsourcing of non-core banking operations reduces overheads while ensuring compliance, security, and high service standards.



Competitive Durability:

By focusing internal resources on innovation, product development, and customer engagement, banks gain a stronger edge in a fast-changing financial landscape.



Risk Mitigation:

Advanced fraud detection, biometric authentication, and robust regulatory compliance frameworks safeguard sensitive financial data and minimize risk.

- ✓ IT Company operating BPO, vs A BPO company integrating IT
- ✓ A right-sized Organization – good balance of agility and stability
- ✓ Not just a lift-shift mindset – A transformational approach
- ✓ Analytics-driven Business Insights

DATAMATICS
**Deep in
Digital**



KEY ANALYST COVERAGE



Niche Player



Major Player



Major Contender



Contender

ABOUT DATAMATICS

Datamatics enables enterprises to go Deep in Digital to boost their productivity, customer experience, and competitive advantage. Datamatics' portfolio spans across three pillars of Digital Technologies, Digital Operations, and Digital Experiences. It has established products in Intelligent Document Processing, Robotic Process Automation, AI/ML models, Smart Workflows, Business Intelligence, and Automatic Fare Collection.

Datamatics caters to a diverse global clientele across Banking, Financial Services, Insurance, Healthcare, Manufacturing, International Organizations, and Media & Publishing. The Company has a presence across four continents with significant delivery centers in the USA, India, and the Philippines. To learn more about Datamatics, visit www.datamatics.com

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