Customer Information Management System (CIMS)

A Case Study on the Effective and intuitive customer onboarding process automation and internal Sales status in real-time sync.

CSM Technologies

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The future of mining lies in embracing customer-centric solutions that align operational excellence with environmental and economic sustainability.

- John Peterson, Industry Analyst

Introduction

The mining industry, known for its complex operations and significant global economic contributions, is rapidly embracing digital transformation to address challenges and improve efficiency. A pivotal development in this transformation is the adoption of Customer Information Management System (CIMS), which enhance customer relations, streamline operations, and optimize resource management. By integrating technology into customer-facing and operational aspects, CIMS empowers mining companies to deliver better service quality, improve stakeholder engagement, and ensure compliance with stringent environmental and safety standards.

Globally, the mining industry's reliance on digital solutions is growing. According to a recent report by MarketsandMarkets, the mining software market is projected to grow from $9.27 billion in 2021 to $12.36 billion by 2026, at a CAGR of 5.9%. This growth underscores the industry's increasing investment in integrated systems that unify customer and operational management processes. Another report by Accenture reveals that 90% of mining executives consider digital transformation critical to maintaining competitiveness, with customer relationship management and data integration being top priorities.

Implementing CIMS in mining helps address the industry's unique challenges, such as fluctuating commodity prices, environmental concerns, and complex supply chains. These systems enable companies to manage customer interactions more effectively while offering data-driven insights for strategic decision-making. For instance, real-time data analytics integrated into CIMS can improve demand forecasting, inventory management, and service delivery, leading to higher customer satisfaction and operational excellence.

Background

Customer and sales lifecycle management in the metal and mining industry can be a long-drawn process subject to multi-level collaboration between numerous departments. Furthermore, depending on the scale and nature of the sales made, the customer base may be segmented into different types, subject to other rules of material allocation and sales processes. In this scenario, a unified interface is often required to allow the customer to manage better a range of disconnected, usually manual, contact and sales processes. It is also envisaged that the Customer Integrated Management Services (CIMS) application, when integrated with the existing ERP (SAP) systems, will lead to efficient data sharing and reporting capabilities for the plant.

Problem Statement

In the present scenario, sales of intermediary and semi-finished products are carried out internally with various touchpoints at the ERP level. However, exposing such a system to customers is often complicated and not advisable, leading to fragmented sales and order management processes.

Given the usual volume of sales, it is pertinent to interface with the customer over a digital platform that adds value to the entire sales cycle and provides a seamless customer experience. Furthermore, a digital platform for managing and redressing any grievances arising from the sales and order management process also requires incorporation.
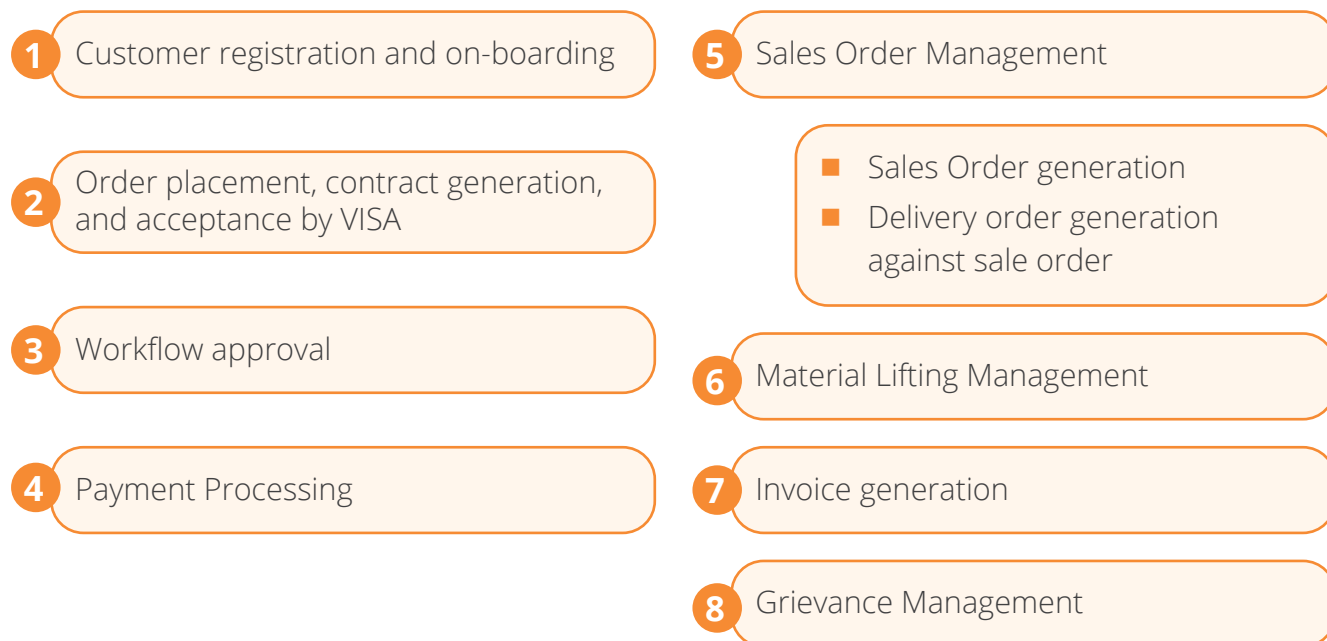
Solution

Introduced a customer-interface portal developed by CSM called Customer Integrated Management Services (CIMS) for traders, plant owners, and mineral-based industries to streamline business processes, bring harmony to functional activities, and expand volumes.

Earlier, manual file processing was carried out to obtain approval from the management. Due to the manual processing at different hierarchies by different actors, including the field level, the whole post-auction order processing was affected and delayed, resulting in a service delay. Businesses suffered due to the delay caused by manual mechanisms. The integration of the CIMS portal automated the entire process and helped the customer and the administrator efficiently use time and money. The portal monitors and optimizes customer onboarding and order processing to help them make an informed and timely decision. Manual intervention has been reduced by automating all activities related to payment, quality, MSTC auction, TCS, TDS deduction, contract modification, general refund, EMD refund, and LTL refund.

The Customer integrated management service leaves no stone unturned; it facilitates a hassle-free customer experience concerning quantity, quality, and transparency in services.

The CIMS platform has the following components as a part of the solution:

1 Customer registration and on-boarding

2 Order placement, contract generation, and acceptance by VISA

3 Workflow approval

4 Payment Processing

5 Sales Order Management

- Sales Order generation
- Delivery order generation against sale order

6 Material Lifting Management

7 Invoice generation

8 Grievance Management

Key features and functionalities

- Provide a single view of all contact and business information to all sales and marketing users

- Provide extensive reporting and management capabilities for all sales activities and interactions with contacts

- Easy monitoring and tracking of orders and lifting of consignments by VISA customer

- Unified interface for customer registration and onboarding management for all VISA Steel customers based on existing customer types and segments (if any).

  - Access provisioning for VISA Steel customers to request contracts, Fund payments, Account Balances, Outstanding amounts, etc.

  - Generation of contract & Sales order information, Lifting and billing information

  - Order processing for the range of ex-plant products

  - Payment processing and invoice generation against any sales contract

  - Providing analytical dashboard and consolidated reporting for sales activity

- Near real-time syncing of stock position for different ex-plant products with ERP

Benefits and value propositions

Seamlessly managed communication via integration with email and SMS for key stakeholders

In-built, configurable workflow for approvals for sales and order generation processes

Real-time dispatch status for orders placed

Reporting and integrated analytical dashboard view of sales and order dispatch performance

Impacts

The solution seamlessly converges and consolidates the complete lifecycle management for customers/buyers to the merchant mining enterprises. The integrated customer management system provides effective and intuitive customer onboarding process automation. Internal sales status is in real-time sync with the on-field dispatch of the minerals. Round-the-clock sales operations, delivery management, and sales order management make for a reliable system that fulfills the principles of ease of doing business and digital transformation of large enterprises.

As a part of its suite of products for the mining/extractive industry, CSM has developed and successfully deployed a bespoke and highly customizable Integrated Customer Management Solution. It embodies a seamless experience through seamless transitions between pre-, post, and core mineral ore sales activities through integrations with other systems, including mineral auction systems, ERP, and ore accounting systems. All customers can access the application online and do regular official activities like applying for registration, submitting their payments, accepting contracts, getting the generated invoice, etc. Then, officer can verify the information and approve it as per the rule.

Orders

▸ Approved Orders: **16479**

▸ Open Orders: **50**

▸ Pending Order: **0**

Revenue Collected

▸ **99041.02 CR**

Grievances

▸ Received: **541**

▸ Resolved: **461**

▸ Pending: **7**

Customer Details

▸ E-Auction: **543**

▸ Long-Term Linkage **113**

▸ Premium: **436**

CSM Technologies is a pioneering Tech Services organization that harnesses the power of existing and emerging technologies to provide solutions with tangible impact on efficiency of governance and quality of citizens' lives.

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