



# CASE STUDY



AngelOne Boosts Customer Experience with Automation & Collaboration through Salesforce & TechMatrix Consulting

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# OVERVIEW

Angel One (formerly Angel Broking), a pioneer in India's financial services sector, embarked on a mission to reimagine its customer engagement in a fast-evolving digital landscape.

## BACKGROUND

With over 30 million registered clients and a robust presence in tier-2 and tier-3 cities, the firm sought to deliver hyper-personalized, seamless, and scalable investor journeys across digital platforms.

As one of India's largest digital retail stockbroking firms, Angel One is a fintech-first company dedicated to democratizing investing and trading. Founded in 1996 and digitally transformed over the years, the firm offers a wide range of services including equity trading, mutual funds, loans, and more.

With a commitment to "Smart Sauda", Angel One empowers millions of investors through an AI-led, mobile-first experience.



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# CHALLENGES

At Angel One, customer centricity is more than just a principle—it drives every product decision and business process, including service. Whether customers seek assistance with transactions or trading, Angel One is committed to delivering a seamless, efficient, and connected service experience.

## **FRAGMENTED ENGAGEMENT CHANNELS**

Angel One's service interactions were distributed across various disjointed channels, limiting agent visibility and continuity in investor communications.

## **LACK OF PERSONALIZED JOURNEYS**

Despite a rich data pool, Angel One faced challenges in delivering contextual, AI-driven communication tailored to individual investor behavior.

## **SCALABILITY FOR HYPERGROWTH**

With an ever-increasing client base and a surge in digital adoption, the firm needed a scalable infrastructure to manage massive interaction volumes without compromising customer experience.

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# SOLUTIONS

Recognising that service is a shared responsibility, Angel One has deployed Service Cloud across multiple teams—including KYC, risk management, operations, and product teams. While these teams may not interact directly with the customer, they're able to work together as one unit on Salesforce to resolve service requests quickly.

## **SALESFORCE SERVICE CLOUD TO CUTS AVERAGE HANDLE TIME & BOOST EFFICIENCY**

All service channels—including phone, email, the website, and mobile app—are seamlessly integrated on a unified platform. This ensures that no matter which channel a customer uses to raise a query, they receive a consistent, seamless, omnichannel service experience.

As soon as a query is received, it is automatically assigned to the most suitable agent based on the query type, complexity, and required expertise. To prevent duplication of effort, the system efficiently routes tickets even if a customer reaches out through multiple email IDs simultaneously.



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## POWERFUL DASHBOARDS

Angel One also uses Tableau to monitor customer interactions and metrics. The platform integrates effortlessly with Angel One's products and diverse data sets, making it easy to create dashboards.



Teams now have real-time customer intelligence at their fingertips to make better-informed decisions. For example, the product team can analyse when and why customers drop off during key processes such as onboarding. They can even pinpoint which devices and app versions have tech issues that need proactive corrective action.

## CROSS-FUNCTIONAL COLLABORATION

To deepen cross-functional collaboration even further, Angel One implemented Slack as a central communication and collaboration hub across teams. By integrating Slack with Salesforce, the organization empowered its service, marketing, and operations teams to work in real-time, break down silos, and accelerate decision-making.



# RESULTS

The Salesforce-powered transformation deployed by TechMatrix enabled Angel One to deliver faster, smarter, and more personalized investor experiences. and robust service delivery.

## **FASTER QUERY RESOLUTION**

30% reduction in average handle time, enabling faster query resolution and improved agent efficiency.

## **IMPROVED FIRST CALL RESOLUTION**

18–20% improvement in first call resolution rates, leading to higher customer satisfaction and fewer repeat interactions.

## **SEAMLESS TEAM COLLABORATION VIA SLACK**

500+ tech team members now collaborate seamlessly through Slack, streamlining cross-functional communication and accelerating issue resolution.

In fact, every team ranging from network operations and applications management, to quality assurance and site reliability engineering (SRE), is currently on Slack.

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# CLIENT FEEDBACK

At TechMatrix Consulting, our goal was to empower Angel One with a scalable, AI-driven service ecosystem that delivers tangible business impact. The outcome is a future-ready digital engagement model that not only boosts operational efficiency but also elevates the overall investor experience—validating our commitment to driving measurable transformation for our clients.

## TESTIMONIAL

“TechMatrix has been a steadfast partner on our Salesforce journey, working seamlessly with us through all our needs, both big and small. Not only are their skills top-notch—their leadership team is also actively engaged in our implementation, demonstrating exemplary levels of commitment.”

**ANUP SARMA, SENIOR VP AND HEAD OF CUSTOMER EXPERIENCE,  
ANGEL ONE**



# THANK YOU!

Inspired by Angel One's  
success story?

Get in touch with us to start your  
journey toward innovative AI-  
Powered business automations.



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