

## Portea

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### **About Portea – Healing at Home:**

Portea provides doctors, nurses, and physiotherapists for home visits who have passed a rigorous hiring process and have had their backgrounds and medical knowledge verified by senior doctors. Portea also facilitates lab tests at home and medical equipment rentals, making health care more accessible for their patients.

### **Business Challenge:**

Their key challenges were:

- To find a Telephony solution that could handle their calls coming on a Single TFN from PAN India in Bangalore and allocate the leads from these calls to the help desk agents
- They needed their sales team to reach out to the leads and close them on the phone
- They needed to engage with their customers for periodic follow up, update them about new services as well as take feedback on their services provided
- They also wanted a solution that could help them track and monitor their staff on a near real time basis

They decided to choose Ozonetel as their Communications partner after due evaluation, and also our proven track record in similar companies.

### **Ozonetel Solution:**

For Portea, Ozonetel has integrated Sugar CRM with CloudAgent to capture all the details of the callers and the nature of services they wish to avail. Once the details are collected, the leads are allocated to the sales team. The Sales team in turn calls the leads and explains the bouquet of services from Portea and closes the deals over phone, completing the initial sales cycle. The sales team updates the CRM system accordingly. Subsequently, there is a follow-up logic built into the CRM for regular & periodic follow up for up-sell and cross-sell of other services. Portea also uses our system to collect feedback on the services offered. Both these services require extensive outbound dialling.

Portea uses Missed call services for various operational functions e.g. Portea has a practice to monitor its field staff, vehicles, doctors, physio-therapists etc. who are on the field. They can give a missed call and get called back by the support staff with help on directions or instructions for client visit. Portea also collects the availability of the staff and attendants who are not on their regular payroll using Missed Call Service. If a staff member is attending duty on a particular day, he/she will give a missed call before 7am. The admin staff also dials out to the adhoc staff to confirm their availability on a particular day.

They also operate tailor made help desks for some hospitals, which include Manipal Hospital and Columbia Asia Hospital.

Portea also uses Cloud Agent International (CA-IO) to reach out to NRIs whose parents are in India and need home care.

## **Ozonetel Impact:**

- ✓ Portea started 3 years back with 2-3 agents and today they have 300+ agents handling, Inbound, Outbound and Missed Call services
- ✓ Most of their operational functions are completely integrated with our Cloud based Telephony solution making their operations inherently efficient.
- ✓ Portea manages complete tracking and monitoring system over telephony, to ensure continuity and consistency of their services 24X7, 365 days a year.
- ✓ They have been able to expand rapidly because Ozonetel gives them the flexibility to add more centres and enable the communication system within hours.
- ✓ Complete savings in CAPEX and Maintenance
- ✓ They are able to track recordings for improvement in services offered
- ✓ Portea is using KooKoo platform extensively for their IVR based promotional campaigns
- ✓ They are able to optimise on manpower since all the calls are being handled centrally from Bangalore

Improved ability to reach back any missed or abandoned or queued calls in near real time helps them prevent any loss of business.