

**Optimising Operational Efficiency and Market Penetration: A Comprehensive Analysis of
Automation and Marketing Strategy at Synergy Solutions**

Internship Organization Name

Synergy Solutions

Prepared by

Abdullah Al Mahmud

ID: 221011037

Supervised by

Parvez Mahmud

Senior Lecturer, School of Business

Submitted in Partial Fulfillment of the Requirements for the Degree

Bachelor of Business Administration



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Internship/Project Report Approval Form

Student Name Abdullah Al Mahmud ID No. 221011037

Major: Marketing Year: 2025

Mobile Phone: 01792723308 Email: abdullah.mahmud1.bba@ulab.edu.bd

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Signature: _____

Date: _____

Name: _____

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Name Abdullah Al Mahmud (BLOCK LETTERS)

ULAB ID # 221011037

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Letter of Transmittal

December 2025

University of Liberal Arts Bangladesh (ULAB)

688 Beribadh Road, Dhaka 1207

Parvez Mahmud,

Senior Lecturer ULAB School of Business (USB)

Subject : Submission of Project Report on " Optimizing Operational Efficiency and Market Penetration: A Comprehensive Analysis of Automation and Marketing Strategy at Synergy Solutions"

Dear Sir,

Please accept this letter as the formal submission of my project report, titled "Optimizing Operational Efficiency and Market Penetration: A Comprehensive Analysis of Automation and Marketing Strategy at Synergy Solutions".

This report was completed in partial fulfillment of the requirements for my Bachelor of Business Administration (BBA) degree at the University of Liberal Arts Bangladesh. The project involved an-in depth study of the operational efficiency of the automation software like CRM by Synergy Solutions.

In this report, I have tried to merge my learning of theoretical concepts from my BBA with practical research to analyze the efficiency of operational activities in Synergy. I am grateful for the opportunity to apply my academic learning to a real-world business case.

I welcome your valuable feedback and look forward to your assessment.

Sincerely,

Abdullah Al Mahmud

ID - 221011037

Bachelor of Business Administration (BBA); Concentration: Marketing

ULAB School of Business (USB)

University of Liberal Arts Bangladesh (ULAB)

Acknowledgement

First and foremost, I offer my sincerest gratitude to Almighty Allah for blessing me with the patience, courage, and perseverance to complete this challenging project within its required timeline.

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Finally, my deepest and most heartfelt thanks go to my family and friends for their unconditional love, unwavering support, and steadfast belief in me.

With limited prior experience, I have strived to produce a report that is both insightful and genuinely reflective of my learning. For any shortcomings that remain, I bear sole responsibility.

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Chapter 1: Internship Preparation

1.1 Motivation to Do an Internship

The urge to take up the internship at Synergy Solutions was due in large part to my field of study – Marketing, which I felt was exactly related to the way this firm worked and how it was structured. The internship was an excellent chance for me to materialise my theoretical marketing science into actual business material, mainly on sales, marketing, and communication – key parts of the marketing world.

I was more than excited and eager to transform my academic learning into real-world scenarios, particularly executing effective sales strategies, mastering cross-cultural communication, and effectively doing one-to-one negotiations with North American clients. Perhaps the most challenging part was connecting with small and medium-sized enterprises (SMEs) and trying to provide them with the right source of information and capital. The role that I played not only reflected on the core of sales and marketing but also taught me how to sell and be a good salesperson. It boosted my confidence even more, and I became a new version of myself. It successfully integrated my academic and professional life, right from scouting new clients and making a successful sale.

1.2. Internship Search Process

The whole search for the perfect internship search process began very early for me. I began to browse through different career and job opportunities pages on Facebook, and I made sure to constantly check each and every one of them every day to scout the perfect opportunities. I applied to multiple companies, the majority of which were the MNCs. I had to go through an aptitude test first, then multiple interviews, and then, somehow, in the end, I got rejected.

Afterwards, I gave an interview at Anwar Group of Industries and was selected as the Business Development Intern, but did not pursue it through as the responsibilities did not align with me. Alongside the behaviour of the HR and other employees was a bit harsh to me, and I decided to drop the idea of joining a bigger company.

Then came Synergy Solutions, the company perhaps that I was searching for. Synergy Solutions perfectly resonated with me as a marketing major. I came across an opening while browsing through BD Jobs. Being intrigued by the company, I decided to research more about them on Facebook and LinkedIn pages to gain insight into their corporate culture and the employees' experience.

Everything about Synergy perfectly aligned with my career goals, right from its emphasis on B2B sales, marketing, professional growth opportunities, and exposure to International clients. Since I was practically from an English medium so I thought it would be a bit easier to communicate and interact. Another important and motivating factor was the monthly stipend and several other intern-friendly facilities like free snacks and dinner, unlimited tea and coffee, and participation in outdoor corporate events. Since I have been playing football and have also seen Synergy participating in many corporate football events, this added more thrill for me to join them. Such additional perks meant that the institution valued its interns, therefore further motivating me to apply with full dedication and enthusiasm.

1.3. Internship Interview Experience

The application process started with me submitting my application via email. Next, I received an interview call approximately two weeks later. The interview was scheduled at Synergy's Mirpur-10 office, which appeared to be a professional place with a relaxing environment. Before the interview, I was provided with a small form to fill out my personal details. After a short wait, I was called in for my interview session.

Since it was the company's interview I set my eyes on, I felt both nervous and excited as I really wanted to join the company badly and was both nervous and excited. Dressed in formal attire, I drew confidence from my previous presentation, public speaking experience, and interview experience at other companies. Once I entered the interview room, two interviewers were sitting right across from me, one being the Head of HR and the other being the Head of Operations. They greeted me warmly and asked me to take a seat. The session began with a self-introduction, followed by some questions about my background and studies, whether I was familiar with the area of sales, and had any prior relevant experiences. I quickly mentioned my affiliation and

involvement in online marketing and sales for my clothing brand: Libaas.Fit, which proved my expertise in having an entrepreneurial mindset with good communication skills.

The HR then gave me a detailed overview of the responsibilities that I had to adhere to, and also briefly highlighted that it was a night shift position (8 PM to 5 AM). I briefly agreed to their terms and conditions as they perfectly aligned with my personal routine. Then I was also asked some scenario-based and marketing-related questions to understand my adaptability and test my critical and analytical thinking. One thing that was never missing was that the interviewers maintained a supportive and friendly tone throughout the interview, which eased my nervousness. They also assured me that if I were selected and if I did work with them, then my whole internship experience would be really enjoyable and enriching.

After some days had passed, I received a confirmation call that confirmed that I was selected for the internship. The HR then shared additional details outlining the incentives, other benefits, and their performance evaluation process, while also mentioning that if I showed a good performance, that would help me land a permanent role. This confirmation marked an important and exciting beginning to my professional journey.

1.3. Brief About the Internship Organisation

Synergy Solutions Ltd. is an international Business Process Outsourcing (BPO) firm that is located in Mirpur-10 and Mirpur-13. Primarily, the organization operates within the financing, sales, and marketing sectors. Since its inception back in 2013, the company has been providing a wide range of professional and marketing services for its registered partner organizations in the USA.

Synergy Solutions primarily acts as the bridge or as the mediator between the small and medium-sized enterprises (SMEs) located in the USA and Canada and the direct financial lending institutions over there, which include the local banks and online lenders. The main specialization or the product or services it provides is: It provides unsecured business working capital for small and medium enterprises (SMEs) without any mortgage, collateral or personal guarantee. This is possible as it solely focuses on the financial credibility and growth potential of each business. For each and every successful transaction and deal, Synergy earns a service fee or

commission, which shows it has an important role in connecting entrepreneurs with their desired financing opportunities.

Every sort of communication, documentation processing, and operational processes are directly managed by the dedicated team in Bangladesh, which provides effective accuracy, confidentiality, and efficiency throughout the whole stage of the loan facilitation process. Synergy acts as the perfect middleman between the lenders and borrowers and plays a pivotal role in getting the SMEs their desired capital with which they can invest and generate more revenue and profits for the business.

Synergy has the best track record when it comes to being professional and has the required knowledge of the global market. Synergy provides the ultimate platform to young professionals who are looking to begin their career and require the much-needed exposure to the international scene, while also providing practical work experience in the arena of financial services and business development.

1.3.1 Mission Statement

The mission of Synergy is simple: to support the small and medium-sized enterprises (SMEs) and make genuine connections to the established and renowned lenders in the USA and Canada who can provide access to the right capital, while also being credible and offering the lowest rates and the highest terms. It is more than committed to providing transparency while also focusing on the client and ensuring decent profits. By providing continuous service and quality of the highest standard, Synergy strives to make a positive impact in the world of SME.

1.3.2 Vision Statement

The vision of Synergy is to be an established brand and company in the business finance and outsourcing industry. Its vision is to be an icon in terms of having integrity, continuous innovation, and providing the right benefits for businesses. The company strives to progress even more through continuous research and development, advancements in technology, etc. The vision is clear and simple: to contribute to the overall economic development and also be a household name in the area of finance across the globe.

1.4.3 Core Commitments and Values

Synergy's fundamental beliefs, business practices, and corporate culture consist of the following :

- Integrity: Being truthful, equitable, and open in all business dealings.
- Client satisfaction: Establishing enduring bonds via dependability, promptness, and superior customer service.
- Efficiency: Ensuring timely, accurate, and seamless loan processing for every client.
- Innovation: Constantly adopting new systems and technologies to maximise efficiency.
- Teamwork: Encouraging cooperation, mutual respect, and group accountability within the company.
- Growth Mindset: Promoting education, flexibility, and career advancement for all staff members.

Chapter 2: About the Internship

2.1 Activities of the Department

Synergy's sales and marketing department plays a key role in acquiring new customers, working as a middleman with SMEs between lenders, as well as internal operations of the business. The department is all about lead generation, sales conversion, and continued business relationships. This renders it a major income-earning department of the institution.

When I first joined the company, they put me to work in Sales with the goal that I'd be able to bring in leads and increase sales. The team consisted of 17 members and a Team Leader who organized, advised, and evaluated our data collection. A collaborative field-marketing effort, we contributed to pipeline generation through lead identification and qualification of merchants on specific benchmarks.

It's from this department that the company gets its generated revenue, first by finding prospects and determining which ones are qualified before passing them to higher sales tiers for funding those deals. I belonged to a small group that was affiliated with the operations wing and followed our progress closely. The Operations Manager was always telling us ways in which we could do our job better and get higher conversion rates.

2.2 Work Environment

The overall work environment at Synergy Solutions was both professional and very engaging. Despite it being a night-based job, the company was very supportive and had a very safe and secure environment. All of the colleagues were highly cooperative, and the supervisors were very helpful and approachable in terms of anything, even if it was not related to the office. The best part of it was that the whole base of Synergy relied on effective teamwork. They always used to mention that teamwork is dreamwork. The whole management made sure that the interns felt valued, at home, engaged in discussions, and had meaningful learning opportunities.

There was no strict formality or hierarchy in the office setting. The office had a rule: The seniors, management, even the boss had to be addressed as "Big Brothers" instead of the formal "Sir". Even the office environment was such friendly that after the end of the shift, if we got bonuses, we used to go out and grab breakfast. Also, the best team of each and every month was rewarded with a hefty amount with which they used to party. Also, each and every celebration was duly celebrated. Each and every employee's birthday was effectively celebrated by cutting a cake and providing gifts.

Additionally, there was a performance bonus for the top 3 performers for each and every month. They were rewarded with attractive bonuses. Also, there was a performance appraisal every 3 months.

2.3 Job Position and Responsibilities

As a Customer Relationship Officer (CRO) at Synergy Solutions, my job was to help customers. My main job was to call small and medium-sized business owners in the US and Canada and find out if they were interested in becoming clients. Then I would check to see if they met certain criteria.

My main duties were:

- Making cold calls to people who might want to start a business and finding out who is interested in unsecured business loans.

- To qualify the leads, we checked that the businesses had been open for at least three months, made at least \$10,000 a month, and needed money within a month.
- Helping new hires by teaching them how to make calls and sometimes taking live calls from them to help them close sales or find new leads.
- Reporting daily sales and call performance to the Team Leader to make sure that team goals and ratios were met.
- Managing relationships with customers, making sure communication goes smoothly, and keeping clients happy.
- Working with other team members to come up with and put into action sales and marketing plans that will help us beat our competitors and raise our overall conversion rates.
- I had to be persistent, flexible, and good at strategic communication because I was always working with different clients in different countries.

2.4 My Takeaways from This Position

This internship with Synergy Solutions made me spread out and grow as an individual more than probably any other experience. One of my proudest successes was not only learning to speak better English but also becoming more fluent by being constantly on the phone with people who were international clients. Interviewing business owners in foreign cultures helped me to be a better listener, respond with confidence and professionalism, no matter the situation. I also learned many things about data entry, MS Excel, and CRM software, which improved my technical and analytical skills. I also found out how to manage angry customers, maintain cool in certain situations, and adjust my tone/pitch depending on how the customer is behaving. Additionally, I learned how to better cooperate with others, manage my time, and troubleshoot because of the experience. More importantly, it helped me grow confidence and maintain self-discipline, and become able to withstand work pressure - all of which are crucial abilities for success in marketing in the future.

2.5 Relating Educational Learning to Internship Roles

The classes I attended as a Marketing major provided me with a solid foundation that resembled what I was doing in my role as CRO. Many of the marketing concepts and models that were taught at university were applicable to my job at Synergy Solutions.

I learned how to target audiences, determine what customers want, and adjust my communication based on what I studied in classes like Principles of Marketing and Consumer Behaviour. The theory I'd learned from Sales and Promotion Management helped me with persuasion, handling objections, and the psychology of sales.

The course that I did on Business Communication under Tawhid Reaz sir helped me to the maximum level as it taught me different ways on how to communicate properly and effectively, while also working on my tone, clarity, and confidence. It boosted my confidence highly as I was getting to interact with clients all over North America.

Lastly, the digital marketing course that I did under the supervision of Umana Anjalin, ma'am, also helped me greatly as I embraced the concept of online engagement, tracking, and lead management. All of this university knowledge helped me translate and apply it to the real-world scenario.

2.6 Challenges and Solutions

The internship, like any other work, had its own share of dilemmas and problems. But every one of the issues helped me become a better version of myself and also improved my work and critical thinking.

One of the most difficult parts of the work was adjusting to the time zone, as I was pulling off an all-nighter from 8 p.m. to 5 a.m. I had trouble in the first place as I found it hard to maintain focus and be energetic. I managed to reverse the issue by maintaining an effective sleep schedule, while also taking frequent small breaks and fitting in a balanced routine, all while being busy and productive.

Another challenge was the way I spoke to North American clients, as their accent was hard to follow. I managed to overcome that by effectively practicing, listening, and observing my experienced colleagues.

Finally, it was a bit challenging to hit the daily targets and goals. I survived the situation with my prospective client list, focusing on quality over quantity and always asking my Team Leader and Team Captain for their feedback. With time, I developed better skills and got things done in their due time.

All of these experiences made me a man of the highest value, wise and flexible. These critical skills will also help me in the foreseeable future.

Chapter 3: Self-Reflection

3.1 Feedback on Internship

Being an intern at Synergy was a life-changing event. The company consisted of friendly and helpful people who were always there for everything. The whole management encouraged both equality and respect towards one another.

Such an attitude was something that I really liked. I also received life-changing advice from my supervisors, team leaders, and managers who were always there to help me at my lowest and helped me every day to get better.

I improved my communication skills and learned business etiquette in other cultures by working with clients based abroad. The firm also offered certain pleasures — free snacks plus a bit of warmth (coffee, dinner for the night shift) at the workplace, which was motivating and also rewarding.

I also enjoyed that I actually got to see how real business is done up close. Every call, every lead, every client interaction was an opportunity to train. Every night, I generated 500 to 1000 calls identifying and qualifying business owners and regularly sending leads to the sales team. It was inspiring and extremely confidence-boosting to see how I personally contributed to the company's bottom line.

But there were a few things I had difficulty with. In the beginning, adjusting to sleeping during the day was difficult, and it took me a while to learn how I could manage my time and adapt my

lifestyle. And, lastly, I figured that a rotation system among departments might have given me more insights into how the company functions on a larger scale, like digital marketing or operations.

Despite all these issues, it was a really positive experience and taught me how to be tough, patient, and professional.

3.2 How I Could Do Better and How They Could Utilize Me Better

After doing the job, I realize that I should have done better in some aspects. I always hit my lead-generation objectives, but I may have spent more time analyzing call patterns and client reactions to make my efforts more strategic. Had I figured out when most people are most likely to buy, or modified the way I speak and write, it's arguable that more folks would have purchased.

As a marketing major, there could have been initiatives to create small marketing campaigns or keep customers based on the fact that we have digital platforms and customer data.

I believe it would have been more useful to the company if they had put me to work with other departments. As an example, in retrospect, working on the digital marketing or analytics side would probably have gotten me more exposure to most other parts of a business. It would also enable interns like me to apply what we've learned about sales and marketing in real-world scenarios.

By and large, I am proud of everything that I have done, but in any job, you need to constantly learn to get better. These thoughts have made me work toward better aligning my background with the needs of the organization.

3.3 How They Can Improve the Experience for Future Interns

Synergy is a great place to work, but it can address some issues to make it better, like:

- First, I believe the organization needs to establish a formalized orientation program for new interns. This could be company norms, the way things are done, and what interns need to know to fit into an organization that much more quickly. As well, a quick little

training on CRM tools and communication would also assist interns in learning how to use technology right out of the starting gate.

- Second, a departmental rotation system would allow interns to see different parts of the company – Marketing, HR, Operations, and so on. It would greatly help them to understand how each and every department worked, and adjustments could be made based on that.
- Lastly, if monthly feedback workshops can be organized, then it will greatly improve the overall condition by teaching the interns and other newly recruited employees by adapting to new skills, and also be interactive in complex and modular topics like customer communication, stress management, and actively negotiating with clients.

3.4 Conclusion

In sum, my internship at Synergy Solutions Ltd. was not just a professional learning experience but also one of personal development. "I joined the company as an enthusiastic student who wanted to put marketing plans into action, and I left with real skills and knowledge - as well as more confidence in what exactly my future career would need and require."

I was taught a lesson that it's not only about the knowledge but also about emotional intelligence, adaptability, and working in a team to be successful in corporate life. I also learned the value of staying focused, always remaining optimistic in every engagement, and continuous learning.

Finally, this internship provided me with a better base knowledge for my career in marketing & business development. It increased my understanding of client psychology, interacting with other people, and instilled a sense of professionalism I'll take with me wherever else life leads me.

Chapter 4: Personal Development Plan

4.1 Short-Term Goals (1–2 Years)

- My main goal is to lay a strong foundation in sales by getting more hands-on experience and also improving my overall technical skills, and achieving certifications related to the field. All the lessons, wisdom that I learnt at Synergy, like the importance of flexibility, coordination, and critical thinking, have helped me set these goals.

Some of my short-term goals are:

- **Mastering Digital Marketing:** I need to master digital marketing tools, which will require adequate certification from Google Digital Garage or Google Analytics and Meta Ads Manager to learn how to design and assess digital marketing campaigns.
- **Getting Hands-on Experience at Data Interpretation and CRM:** I wish to improve data interpretation and CRM efficiency. This will require considerable use of CRM platforms and Excel-based data analytics to understand customer insights and campaign performance better.
- **Communication and Presentation Skills:** To further enhance my communication and presentation skills, I can do some public speaking workshops, along with doing some English communication skills. These will further enhance my confidence when speaking with International clients and also while giving presentations.
- **Networking and Industry Exposure:** I want to learn more about business in this sector and also do some networking to further boost my career. I want to do that by going to local business seminars, webinars, marketing conferences, and meet new people related to the field, and learn more about the latest marketing trends.
- **Experience in Sales and Marketing roles:** Finally, I want to get a full-time job in sales, as my background perfectly aligns with it. That is, I must acquire more professional experience in sales, business development, and digital marketing to access a full-time job to learn from industry leaders. Further, I would also want to turn this into a business model.

These short-term goals will help me obtain a stronger base and prepare for more sophisticated management roles.

4.2 Long-Term Goals (3–5 Years)

Ultimately, I aspire to be a marketing leader and a strategic marketer who can operate a marketing business and create brand value in the world. I would like to work in areas that demand analytical and creative thinking: brand management, content strategy, or business development.

My long-term goals are as follows:

- I aspire to become a leading marketing manager and also a professional business development specialist who would work for Multinational companies or the best local companies, where I would work as an industry leader and oversee major marketing projects and help build the brand or company even more.
- Further Education and Specialized Training: I would want to do an MBA or a Master's in Business Analytics to further improve my knowledge and skills in the world of strategic management and effective leadership.
- If I get to work on International projects and with people all around the world, it would help me get a better understanding of its work and also the overall business setting.
- In the foreseeable future, I would like to convert my learnings and preach them by starting my own marketing agency or BPO that would further help small businesses grow by using modern marketing tools.

These long-term goals would create a massive difference in the world of business and marketing.

4.3 Skills to Learn in the Future

The professional world is changing rapidly, and staying relevant is the need of the hour. I would need to continue working on developing my technical and soft skills so that I can reach both the short-term and long-term goals that I have set.

A. Skills in Technology

Learning Google Analytics and Search Engine Optimization: To get a better understanding of how much traffic the lead, business, or website gets, I should learn about Google Analytics and SEO to further measure my work and determine if my marketing techniques are a success or not.

- Paid advertising and social media marketing: To get better at managing ads on Facebook, Instagram, and LinkedIn, and make my brand more visible.

- Customer Relationship Management (CRM) Systems: Platforms like HubSpot and Salesforce make it easier to manage sales and interactions with customers.
- Email and content marketing tools, like Mailchimp, Canva, and Copy.ai, help you make campaigns that are right for your audience.

B. Other skills

- Leadership and Team Management: I learned about leadership and how to lead a team effectively from my Team Leader. I hope to integrate that and mold it according to my own leadership style.
- Interpersonal Communication: Effectively making communication with other team members and also with the clients.
- Managing Time and Stress: It is important to effectively manage time and complete tasks within the given time.
- Solving Critical Problems: Using AI and other forms of technology to solve critical problems.
- Negotiation and Persuading the Customers: Meeting the expectations of people and getting them to buy the product.

All of these will help me master both the creative and analytical sides of marketing and help me achieve my goals.

4.4 Continuous Learning and Career Growth Outlook

I do believe personal growth is ongoing, and also that the business world needs people who will evolve. Synergy Solutions gave me a lesson – if you want to be successful, you have to learn, evolve, and lead. Starting now, I will be sure to commit myself that I will never stop learning for the rest of my life, taking online courses or getting hands-on experience.

4.5 Conclusion

In conclusion, my time at Synergy Solutions was a turning point for my career and also for my personal growth, which briefly outlined my professional goals, while highlighting my strengths and also defining areas where I can improve. It showed me areas for improvement and how I can grow further.

Now my next course of action is to be an excellent marketing professional who can creatively think out of the box and use sharp analysis to hit long-term goals. The skills that I have learnt are more than invaluable, and I continue to learn and grow, and become the next industry leader.

Part B

Optimizing Operational Efficiency and Market Penetration: A Comprehensive Analysis of Automation and Marketing Strategy at Synergy Solutions

Executive Summary

This research seeks to better understand the challenges, like optimizing operational efficiency and market penetration, faced by Synergy Solutions, an International BPO firm connecting Small and Medium Enterprises (SMEs) in the USA and Canada by providing unsecured business loans without any mortgage or personal guarantee. By taking notes on a series of such comprehensive mixed-methods investigations, this research identifies certain bottlenecks in the company's current operations, mostly due to reliance on manual processes and broken or unidentified digital systems. The study surveyed around 45 stakeholders, such as employees, partner financial and lending institutions, and regular small and medium-sized enterprises (SMEs), to identify how operational inefficiencies affected service delivery and how competitive the market is. If we take a look at the key findings, we can assume that manual data processing takes about 60% of operational time. This slows down loan approvals and reduces client satisfaction. On the other hand, the study also shows that automating repetitive tasks and improving the overall digital marketing efforts could cut processing time by more than 45% and overall increase the market reach by at least 30%. This research also shows a phased implementation roadmap for technological integration that weighs cost concerns against operational improvements by systematically analyzing workflow patterns, stakeholders' feedback, and overall industry benchmarks.

The research provides some actionable recommendations for Synergy, which is set to undergo a massive digital transformation. It also provides greater emphasis on gradual automation, building employees' skills, and using certain digital channels while also preserving service excellence and operational visibility in competing markets to improve the overall visibility among targeted SME segments as part of a larger marketing strategy.

Chapter 1: Introduction

Synergy Solutions is a key Business Process Outsourcing (BPO) firm that plays a crucial role in the financial ecosystem by serving as a bridge for small and medium-sized businesses (SMEs) to secure unsecured business working capital without risking any assets, mortgages, or personal guarantees. This role is a very important aspect, as it is shaping a rapid transformation in the financial landscape of Bangladesh and helps merge businesses in Bangladesh with the USA and Canada. Currently, Synergy has about 400 employees working in Bangladesh (Mirpur-10 and Mirpur-13).

The small and medium-sized enterprises (SMEs) are mostly seen as being an essential component in terms of prospering the economy further, along with creating more jobs and making innovations with new products, technological advancements, etc. Although there are bigger problems in the picture, like loan defaults, slow repayment, and legal battles, often resulting in businesses not working together or facing a deeper crisis, of sometimes stripping off their operations. Even in stronger financial ecosystems, SMEs experience competing barriers such as lengthy loan processing times, high transaction costs for lenders, and risk-averse credit cultures (Ayyagari et al., 2011).

Synergy helps partner financial institutions give credit to businesses that would not qualify elsewhere. The best part is that Synergy works with all types of partner lending institutions in the USA and Canada. From helping and funding high-end businesses that have more than a million dollars of revenue to helping businesses that make less than even \$1,000. The mantra of Synergy is simple: helping each and every business. It is the business and the owner that count at the end of the day, not the revenue they generate.

Also, the USA and Canada have a credit rating system; the better the credit score, the better the approvals, which loosely translates to having better credit will yield a lower rate and better terms, alongside some other benefits like prepayment discounts, exclusive early renewals, gifts, and whatnot.

Business owners with not-so-good credit in the range below 600 still get approved with Synergy, as Synergy works with all types of lending institutions. The main purpose that lenders and business owners want to work with Synergy is because of the vast network that Synergy possesses, along with working on fulfilling all sorts of gaps. The firm helps partner financial institutions give credit to businesses that would not be able to get it through any other regular lenders or banks. Alongside, it provides other sorts of benefits, like risk assessment and helping with documentation, like analyzing bank statements and tax returns. And also helping them with their accounting activities, like preparing balance sheets, cutting costs, and providing other incentives. Another major thing is that the cash advance or loan that Synergy provides is tax-deductible. So when business owners are filing their taxes, if they show that they have taken funding from Synergy, they will get an exemption from their taxes from the IRS (Internal Revenue Service).

Synergy Solutions, on the other hand, is facing increasing internal pressures that could hurt its long-term viability and competitive edge. Synergy has many competitors, not only in Bangladesh alone but globally as well. There are multiple other financial institutions or middlemen like this, and the numbers are gradually increasing day by day. In Bangladesh alone, it has several competitors like Skytech, Synergy Business Solution, Offshore, and other local companies. It also has strong competition from many call centres and financial institutions in India, Pakistan, the Philippines, Sri Lanka, etc.

According to World Bank estimates, the unmet financing need of formal and informal MSMEs totals more than \$5 trillion annually, disproportionately affecting developing countries where access to credit is limited (World Bank, 2023). However, there is a very big market opportunity, as the global unsecured loan market is expected to reach a number of around USD 3.1 trillion by 2032. In the USA alone, it is expected to hit the market size of USD 1872.45 billion.

The problem that is persistent with Synergy Solutions is that it still depends on manual operational processes. Like the little core functions of generating a call, getting leads, checking

documents, checking credit, and approving the loan process are very gruelling and compelling work. So it needs to be put in a digital and automation system in the form of CRM, Salesforce, Hubspot, etc. Digital marketing is the strategic process of using a combination of different online technologies and electronic devices to reach different segments of consumers with different promotional messages (Gustavsen, 2023). These solutions cannot work on their own and don't primarily have any integrated workflows or a central place to store the data. Such types of fragmentation lead to more systemic inefficiencies and slow responses, like more than 48 hours.

Synergy has a very limited online presence. The main website that Synergy is trying to build is still under construction. Synergy has been around since 2013, and it is not 2025; it still has a very old-fashioned website that has very limited information. It still does not show our main attributes, like business loans for all, no business is too small, etc. It still relies on personal connections, referrals, and a few marketing efforts. If any client thinks we are a scam or does not trust us, it gets very troublesome to convince the customer. They search for us online, search for our reviews and website, of which nothing is available. So we still have to rely on getting them in touch with our previously funded clients. This is still a very old-fashioned way, especially in tech-savvy areas like North America, where people mostly do a lot of research online. Such old creativity is still hurting Synergy's business, as it could have quadrupled its money. For example, many of the competitors already have a very good online presence in the form of websites, reviews, work ethic, awards, accolades, etc. They have many things that can speak for themselves. Such creativity is taking their market share into a much bigger space altogether.

Such slow acts are also losing us business. Mainly, businesses are looking for quick capital, and they need it urgently. Synergy, with its manual underwriting, is taking more than 1 day to approve and fund the business, while the other competitors are doing it within a couple of hours. If Synergy has automation systems available, then it can easily underwrite faster and fund more businesses, and bring in more capital.

Synergy was mostly dependent on manual processes that caused big operational bottlenecks until June 2025. The company switched things up in June 2025. Previously, the whole process of getting the loan, from getting the lead to qualifying for it, underwriting it, and finally getting the funding each and everything was dependent on employees underwriting the file by hand. This

system did not fit together and needed constant bridging. There were delays in responding to the customers, a higher chance of errors, and less use of resources.

The decision to fully make the digital transformation was essential as this change was not only upgrading to the technology but also rethinking how business works, makes decisions, and gives value to the customers. The change had an immediate effect on every part of the business that including sales, operations, marketing, IT, and administration.

This study will investigate Synergy's transformation journey through the mixed-methods approach, integrating quantitative and qualitative analysis. By combining them, we can get a full idea of both the measurable effects of automation along the human aspect. This approach is critical as it will look closely at the digital transformation.

1.2 Problem Statement

Synergy Solutions has a big problem with its operations, as it relies too much on manual processes for its day-to-day operations. The company's main operational infrastructure is still broken and requires a lot of work. It faces two key problems that could hurt its ability to stay in business and grow further. The first issue is the manual execution of most processes, leading to significant operational challenges and limited opportunities for expansion. Most of the employees have to spend a lot of time entering data over and over and rechecking it, and other documentation.

Operational Inefficiency: The workflows are taking longer than expected because of the manual entry, paper-based documentation, and so on. If we have to look into the normal lead-to-funding process, customer relationship officers, sales representatives, and underwriting teams—each one of them—have to continuously pass information to each other. Each and every time, the data has to be entered and checked back to make sure the information is accurate. This process makes the entire sales process prolonged and raises the cost of doing business.

Customer Experience: Synergy has an average of two to four days for the first lead response to get them an offer and which gives Synergy a disadvantage. Small and Medium-sized enterprises (SMEs) are constantly seeking urgent capital to stock more inventory, buy equipment urgently, and address other cashflow situations. So Synergy is constantly losing a big chunk of such deals. Also, most of the time, customers are not aware of what is going on with their application, and

whether they are going to get approved or not. So they need to call in again and again, which is a clear red flag.

Employee Satisfaction: The employees of Synergy feel the work is monotonous and boring, as they have to do the same tasks again and again, and have to, like, input the same data all over. If a tiny mistake is made, they have to redo the whole thing. As I have seen, this whole boring night shift work has made many employees quit their jobs.

Despite starting its automation journey in June of this year, Synergy has yet to fully implement the entire project or idea. The work is stuck because they don't know what is working best and in which direction they should take it. The employees also don't have enough knowledge about how to use the CRM and other tools, so proper training and guidelines have to be provided.

The main issue that this research will cover is how Synergy can effectively use its digital transformation and achieve its maximum operational efficiency, edge out its competitors, and be a sustainable brand.

1.3 Research Questions

The following research questions guide this study:

- Q1: What measurable changes in operational performance metrics (revenue, deal volume, cycle time, efficiency) have occurred during the transition phase from manual to automated in Synergy?
- Q2: How do employees at all levels feel about this transition, and what are the aspects they find convenient and which ones are hard?
- Q3: What is the relationship between quantitative performance improvements and qualitative employee experience? What new insights or improvements can be given by looking at both these data sets?

1.4 Significance of the Study

This research is important for a number of reasons.

Theoretical Contribution: This research specializes in academic literature on digital transformation, business process automation, and organizational change management by providing a mixed-method analysis that is typically not found in BPO studies.

Stakeholder value: Employees have a lot to say in how these transformation processes are shaped and how customers can get better service because of these research findings, and how the owners and investors get the idea about the growth of the company. They can take ideas from these and implement them in more campaigns.

1.5 Scope and Limitations

Scope:

This study concentrates on the operational transformation of Synergy and analyzes its shift from manual processes to automated systems. This research also includes employees from all departments (sales, operations, marketing, IT, and administration).

Limitations:

This research has a limited scope, as it only looks at a 5-month period since its inception in June 2025, so it is tough to predict the future of the whole thing during such a short period of time. Also, it is a single study of one BPO company, so it is tough to predict the results of other campaigns or BPO industries. This whole study is just a small part that is constantly changing.

CHAPTER 2: LITERATURE REVIEW

2.1 Digital Transformation in the BPO Industry

Digital transformation speaks about the fundamental shift in how the business operates and delivers a significant value to the customers through the use of digital technology across all business areas (Westerman et al., 2014). This whole phenomenon extends beyond just technological adaptations that break organizational culture, business models, and strategic orientation (Vial, 2019).

The BPO industry has undergone massive changes in the past decade, from getting out of the hands of manual labour to being automated, technology-driven operations. Such evolution was the need of the hour as it brought together multiple forces in the form of client demands for

higher efficiency, lower costs, competitive pressures, and technological advancement, as well as pressure from high-tech competitors (Davenport and Ronanki, 2018).

Many studies indicate that BPO firms are more focused on digital platforms as they are continuously performing better than their competitors. According to Oshri et al. (2015), we can find that the organizations that are already enjoying the services of digitally advanced tools have a better profit margin of more than 25-40% higher than any other traditional firms that have lower costs and possess better service quality. Furthermore, another research by Lacity and Willcocks (2016) showed that if the organization implemented automation tools, it would boost productivity by anywhere between 40% to 75%, depending on how crucial the task is.

However, digital transformations in the BPO sector create some unique, difficult situations because, unlike any other company, they don't sell physical products. BPO firms must fundamentally change the whole process they use to deliver services (Oshri et al., 2015). This roughly means they have to manage new technology and retain the overall workforce, while also keeping in mind operating across different countries and cultures (Lacity et al., 2016).

The financial services sector, under which Synergy operates, is under immense pressure to make changes every now and then. Philippon (2016) describes the situation as traditional methods rely too much on manual paperwork and slow approval, which cannot compete with the modern automated platforms that usually provide instant decisions. For BPO companies like Synergy, adopting automation is not just about improving efficiency but is also an essential tool for survival.

2.2 Business Process Automation: Concepts and Benefits

Business Process Automation refers to the use of technology to complete tasks without the need of much human effort. The main goals are to run the operations more smoothly, cut costs, make fewer mistakes and try to make everything work better overall (Aalst et al., 2018). BPA includes a wide array of technologies, from using simple tools for automating workflows and integrating data to advanced AI applications.

Hammer and Champy (2009) came up with the concept of re-engineering the business process, from which the main idea of Business Process Automation (BPA) came. It said that companies

must completely redesign their entire process if they want to achieve big performance gains. Davenport (2013) says that early re-engineering was mostly about changing the way organizations worked generally. Now, with the use of modern BPA, organizations utilize technology as the primary tool to achieve significant improvements.

Some of the real-world examples show that automation can make everything faster and better. Hammer and Champy (2009) found that most successful automation can cut the time it takes to do a task (cycle time) by at least 50–70% and also improve the overall quality. Recent research, including Asatiani and Penttinen (2016), has shown that using advanced automation has recently identified even greater productivity enhancements, increasing from 40% to 75%.

Besides speeding things up, automation has another secondary benefit: it makes the data more accurate. Most studies (Aguirre and Rodriguez, 2017) have shown that error rates drop by at least 60-90% if compared to manual work because human entry mistakes are eliminated, and most of the systems use validation rules. A higher level of accuracy means less rework, fewer customer complaints, and better compliance with rules and regulations.

Companies like Synergy Solutions have changed the way they have been providing funding by automating the whole process, which makes it faster, cheaper, and smarter. Most of the automated platforms now do the job within a matter of hours and days, while the previous traditional manual underwriting and funding of the business took between 4 days and 7 days. This is backed up by research that shows applications are processed 40% faster. This kind of efficiency also has greater financial benefits, as most of the automated systems cost less and reduce human touch and make fewer mistakes.

2.3 Manual Operations Challenges in BPO Lending Facilitation

To understand how automation will help Synergy, we first need to look at the specific problems with the manual processes currently used for providing the loans.

Using manual processes means the workload gets doubled, and the number of people needed for hiring must also roughly double. This makes the whole growth very expensive and unsustainable (Lacity and Willcocks, 2016). For example, Synergy went from 885 deals in 2021 to more than 4000 by 2025 goes on to prove that growing the business requires extensive work too.

When information is all over the place, it hurts both the relationships and the efficiency. For example, Synergy had a common yet annoying problem: it could never find all the information about the customers in one place. Many details like previous conversations, application status and many notes were scattered all over in various spreadsheets, emails and individual files. Manual systems scatter information, preventing comprehensive visibility (Greenberg, 2010). Time-Intensive Work : Many studies of manual work environment went on to show that employees spend more than 60-70% of their day on the same administrative tasks instead of dealing with customers (Oshri et al., 2015).

Margin for error : Manual data processing shows an error rate of 10-15% (Aguirre and Rodriguez, 2017). For a company like Synergy, which helps secure business loans, this wasn't just a minor paperwork issue.

Before automation, the company's own error rate was around 12%. This created a whole cycle of costly rework and strained relationships with the partner lenders and customers.

2.4 Customer Relationship Management Systems and Operational Efficiency

CRM systems have gone on to transition from basic contact management databases to significant business platforms like business automation, marketing campaign management and customer service tools, analytics and reporting tools (Buttle and Maklan, 2019). The CRM systems of nowadays are the epicentre of customer-facing activities and coordinating a range of interactions across multiple channels during the whole life cycle (Payne and Frow, 2005). For Synergy, this was imminent and had a big effect. Whenever a team member now saved a customer note or document, it was automatically saved for everyone in the system, and everyone could see whose lead it was and reduce time. This got rid of the old-time-consuming searches, and every interaction with the customers was better informed and consistent.

CRM is known to add strategic value as it helps companies create a single, unified customer profile that takes data from all touch points, giving a full understanding so that employees can personalize interaction, having the full context (Greenberg, 2010). Also, another usefulness of CRM can be determined in its real-time analytics and dashboards, which allow the managers and teams to make better and quicker decisions at both operational and strategic levels (Chen & Popovich, 2003). In the financial and lending space, CRM systems provide a much-needed

benefit by speeding up operations and producing better results. Banks using integrated CRM have seen loan approval times accelerate by more than 45%, leading to funded loan conversions increasing by 23% and customer satisfaction scores rising by 31% (Bhatia and Bhabha, 2018).

While the CRM is known for providing benefits, many projects may face failure (30-70%) due to several common challenges, which may include: low user adoption resulting from poor training or change management, unreliable data quality and systems that are too complex to use (Buttle and Maklan, 2019). Success is often measured beyond just technology, and it depends equally on the commitment of the organization, along with proper training and converting the ideas into reality (Kumar and Reinartz, 2018).

The value that CRM adds can be further optimized by making it a part of the integral system along with other business aspects, ensuring total process visibility and coordination (Chen & Popovich, 2003).

The proof of the results:

Studies have gone on to show how a good CRM system can be a game-changer for the company. A benchmark study found that, for instance, companies that have a well-established CRM system have a lot of advantage over those without one (Nucleus Research, 2014). They typically go through:

- 27% higher customer retention
- 32% in sales productivity
- 23% increase in conversion rates

2.5 How to Measure the Impact of a Digital Transformation

Evaluating the true impact of automation requires measuring its effects across several key areas of performance (Kaplan and Norton, 1996).

Financial and Volume Metrics for Synergy:

Total Funding Volume: The total revised dollar amount funded is the way to tell how much money a commission-based company like Synergy is making. An increase in funding certainly means that the company is doing well in the market and is ready to take on more work.

If we look at the growth of Synergy, it can be clearly defined that the company has been doing extremely well, and funding has increased from \$2.6 million in 2021 to a projected \$12.5 million in 2025. This goes on to show that automation has helped Synergy create more capacity and improve the business's total operational power.

Deal count: The metric shows how much work the team has actually handled. If more deals are closed without hiring a higher number of people, it goes on to show that more work is being done. Synergy's team size is about 400, but it went from 885 deals in 2021 to about 4,164 in 2025. This went on to show that the company became more productive and not just bigger.

Measuring efficiency:

Lead Response Time: The speed of response is crucial for conversion. Leads contacted within an hour of conversion have seven times more than those contacted after a couple of hours (Oldroyd et al., 2011). By improving its average response time from four days to one day, Synergy has gained a significant advantage.

Workload of employees: After adding automation, Synergy was able to handle more customers, and the number increased from going from 100-150 to 300-400.

Accuracy and Error Rates:

The quality of work is determined if it is perfect; some mistakes, like double data entry or missing entry, incorrect document handling and communication, can strictly affect the quality of work. These mistakes can cause loss of customers and make it harder to work with lenders.

Error rates for manual systems are sometimes between 10% to 15%; automation can cut it by half. For Synergy, this is more crucial as cutting in half from 12% to 6% can be an important step in making the whole customer service more reliable and better.

Customer and Workforce Metrics:

Customer loyalty:

This is the measure of the percentage of customers who return to do business again. In the language of lending, this is referred to as renewal or recurring customers, which is a strong indication of their satisfaction with the services (Kumar and Reinartz, 2018). For Synergy, this loyalty brings in more revenue alongside more referred clients

As Synergy shows an improvement in retention rate from 30% to 45%, this suggests that clients had a better experience. Now this better experience can be a cause of better customer service, lower rate, better terms or no fees.

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Error rates for manual systems are sometimes between 10% to 15%; automation can cut it by half. For Synergy, this is more crucial as cutting in half from 12% to 6% can be an important step in making the whole customer service more reliable and better. This drop lowers direct costs like recruiting again and providing extensive training. Also, it prevents the loss of valuable experience that might further hurt the quality of the service.

2.6 Change Management in Technology Implementation

The success of digital transformation depends on effective change management that can address human and organizational dimensions (Kotter, 2012). It also relies on managing people and the organization effectively without relying just on the technology itself. This was exactly the challenge that Synergy went through when it introduced its automation system in June 2025.

Understanding Employee Resistance at Synergy:

Resistance is natural and a predictive reaction to changes, especially when employees see new technology as a threat to their job security and daily routines (Oreg, 2006). At Synergy Solutions, this resistance came in the form of :

- Employees at Synergy were afraid that the whole automation thing would take up their jobs. Resistance at Synergy was a predictable thing as technology seemed like a personal threat (Oreg, 2006). These fears grew further as the management didn't clearly explain why automation was introduced in the first place. The employees feared their jobs would be taken away as they feared the company was planning to cut staff (Armenakis & Harris, 2009).
- Employees were also worried as the technology was fairly new and they did not have the necessary skill set to use it. The company had a wide range of people, from tech-savvy interns to experienced managers who were used to the old spreadsheets, with comfort levels varying widely (Laumer & Eckhardt, 2012). Naturally, the older contemporaries were anxious about the new technology than their younger counterparts. This went on to mean that a one-size-fits-all training program would not be feasible, as different people with different skill sets needed personal support to be able to use the system.

Critical Change Management Practices Applied at Synergy

Research identifies certain strategies that are necessary for successful change adoption, and these proved critical for Synergy's implementation (Prosci, 2016).

Research identifies clear strategies that are necessary for successful change adoption, and this was a critical point for Synergy's implementation (Prosci, 2016). The management had to clearly let the employees know that the automation was created to help them only take over the repetitive work, fix mistakes, and make their lives easier, not replace their jobs. By explaining the differences between the old manual work and the new automated one, they had created a real and urgent reason for everyone to chip in together (Kotter, 2012).

2.7 Conceptual Framework

Technology, Organization, and Environment: A Guiding Framework

Tornatzky and Fleischer's (1990) TOE framework provides a clear and detailed explanation of Synergy's organizational adoption decision through some key elements:

The Environmental Context presented a clear need for change. Synergy had a four to seven day manual response time, which was severe and possessed a challenge than its competitors. This pressure was even more due to the client's expectations for quick approvals and funding. In such a case, automation was no longer just a strategic advantage but a necessity for its survival.

CHAPTER 3: RESEARCH METHODOLOGY

3.1 Research Design

This research uses a mixed-method approach to convey the full story of Synergy's five-year digital transformation, from 2021 to 2025 (Creswell & Plano Clark, 2018). The research combines performance data, personal stories and feedback from employees. This mixed method approach gives us a clear picture of the five-year journey from manual work to automation, looking at the whole technology, company culture, etc. After the new automation system in 2025, the data showed a positive trend. The revenue was increasing along with sales moving faster. Documentation was easier now, and errors were minimized.

The personal stories of employees gave us the idea of how this happened. Interviews were conducted, feedback was taken to make sure about how the automation fared. Employee experience gave meaning to the statistics, showing human effort and adaptation that shows the result. This combined approach gave us a more complete and trustworthy understanding (Venkatesh et al., 2013).

3.2 Sampling Technique and Sample Size Determination

The quantitative data of Synergy addresses the complete operational performance data from 2021 to 2025. This comprehensive method went on to show that the findings reflect the actual performance of Synergy. The five-year timeline was used to understand about three distinct periods from the pre-automation era, when manual-based operations were used to run, the transition period from January 2025 to May 2025, when the company was making the system ready, and the post-automation implementation period from June 2025 to November 2025.

For the qualitative part, a diverse group of employees was selected to interview from across the entire company (Palinkas et al., 2015). The main reason for doing this was to listen to people

across all departments who were in different roles from sales, operations, IT, etc, to understand how the change impacted different parts of the business.

In total, 35 detailed interviews were conducted with the employees to get a better idea about the transformation. The research was done by speaking with 6 Team Leaders from the Lead Generation Team, who were there to guide the customer relationship officer and the intern, twenty salespeople who are the main revenue generators of the company, and two team members from the operations team, to get a full-fledged idea about the whole operation. Three HR people were also interviewed as they managed the recruitment and training. Finally, 4 Customer Relationship Officers were interviewed to hear their side of the story about customer handling, previous sales, and duplicates. This large and varied group of interviews allowed us to explore all sorts of changes and differences in how the change was experienced across different jobs, levels of seniority, etc.

3.3 Data Collection Instruments and Procedures

Quantitative Data Collection:

The quantitative data were taken directly from the operational databases of Synergy. Data was taken from multiple systems in the form of: spreadsheet tracker and analyzer, and pre-automation period data. Also, new data was taken from the CRM platform that contained customer interactions, an HR management system for employee metrics, and a financial reporting system for funding and deal volumes.

The research was focused more on some key performance indicators that directly measured Synergy's success, which included:

- **Total Annual Funding:** The total revised funding, which is the company's main source of revenue.
- **Number of deals closed:** This analyzes the total number of deals that have been successfully closed and funded.
- **Sales Cycle:** The number of days from the first contact to final funding.
- **Lead response time:** Analyzing how quickly an employee was able to contact a potential new client.

- Customer retention: This analyzed what percentage of customers who were retained as recurring customers.
- Employee turnover rate: The rate at which staff leave the company, which indicates workforce stability.

Qualitative Data Collection:

Semi-structured interviews were the main method to understand personal stories and insights. The approach allowed for deep, conversational discussions about the real-life experience of the employees and changes they faced (Brinkmann & Kvale, 2015). The conversation was guided by a set of questions designed for the situation of Synergy.

The semi-structured interview explored four key areas of the experience of the employees. First was described as the old way of working- the daily routines and the challenges of using spreadsheets and other manual systems to manage before the automation. Next was the transition phase about how they learned about the new system and the changes, and the aftermaths. Then it was all about how the work got shifted once CRM was implemented, which included new benefits, ongoing challenges and the difficulties they faced while adjusting.

3.4 Data Analysis Methods

Quantitative Analysis:

The numbers have been crunched in simplified and descriptive ways to understand the story of Synergy. For each performance metric, we averaged the simple averages to see and analyze the before and after situation of the automation. We compared the analysis for the old manual period from 2021 to 2025 against that of 2025. This showed a clear trend, as the annual revenue went from just being \$4.4 million to \$12.5 million in 2025, which showed an increase of around 184% which is massive. We also analyzed the trends from 2021 to 2025 to exactly understand when the performance began accelerating, which clearly aligned with the June 2025 automation launch.

Qualitative Analysis:

The interviews that were taken were carefully analyzed to find some common themes and connect the dots. Some key ideas emerged from the conversation that were grouped together to

find major patterns in the experience of the employees, like fears about job security or being in control of the system, which were among those that were in the minds of the employees.

From the employee interviews, five major things emerged, which are :

- **Manual Burden:** Employees voiced their frustration and inefficiency working in the old, spreadsheet-based method
- **Job Fear :** When automation was taking over, people feared their jobs would be taken away.
- **Efficiency Leap :** Employees voiced their opinions as to how CRM and other sort of automations brought a massive change in their work and now they were able to handle twice as much lead and generate more revenue.

Connecting the Findings

The data and the findings were connected at every stage throughout the story (Fetters et al., 2013). During the interviews, employees were specifically asked to explain about the performance trends that were observed in the data. All of these analyses were conducted separately for each and every data type and then integrated altogether.

3.5 Ethical Consideration

The research was conducted with a strong commitment to ethics. Each and every participation was voluntary and every employee provided a clear and written consent. People could skip the questions they did not like and full approval was taken from the leadership department of Synergy. Also each and every data out there was taken and was kept secure and confidential.

CHAPTER 4: QUANTITATIVE FINDINGS - Data on Synergy's Transformation

This chapter explores what the numbers tell us about Synergy's performance over the course of last 5 years. We look at the data derived from the company's operational databases, financial system, HR records to verify the pre-automation time from 2021 to 2023, transition period from January 2025 to May 2025 and the post-automation implementation from June 2025.

4.1 Summary of the Performance Data

For the analysis, we looked at Synergy's complete operational record. Each and every transaction was processed by looking at the leads generated by the company's 400 employees over the last 5 years. The data covered from Synergy's internal system, old spreadsheets, new CRM platform, financial and HR records

4.2 Financial Analysis

Total Funding:

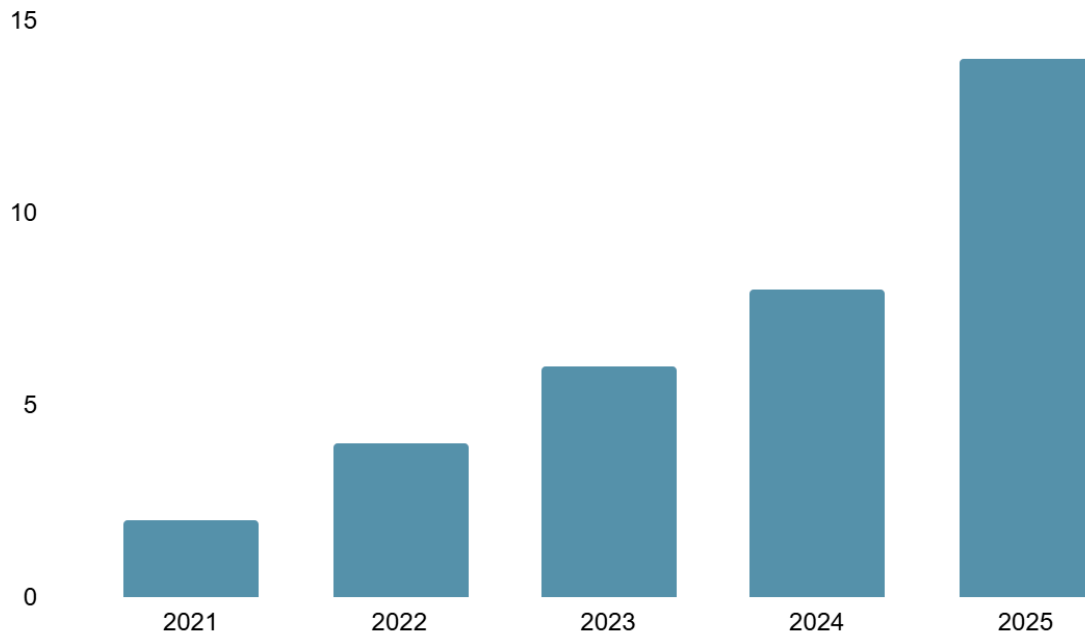
This is the total sum of money that Synergy helped facilitate to the SME sectors. This figure is important to determine the revenue and the commission.

Table 1: Total Revenue Generated

Year	Total Funding	Year Over Revenue
2021	\$2.6 Million	Baseline
2022	\$4.2 Million	61.50%

2023	\$6.4 Million	52.40%
2024	\$7.9 Million	23.40%
2025	\$12.5 Million	58.20%

Total Funding Growth



Some Key Findings :

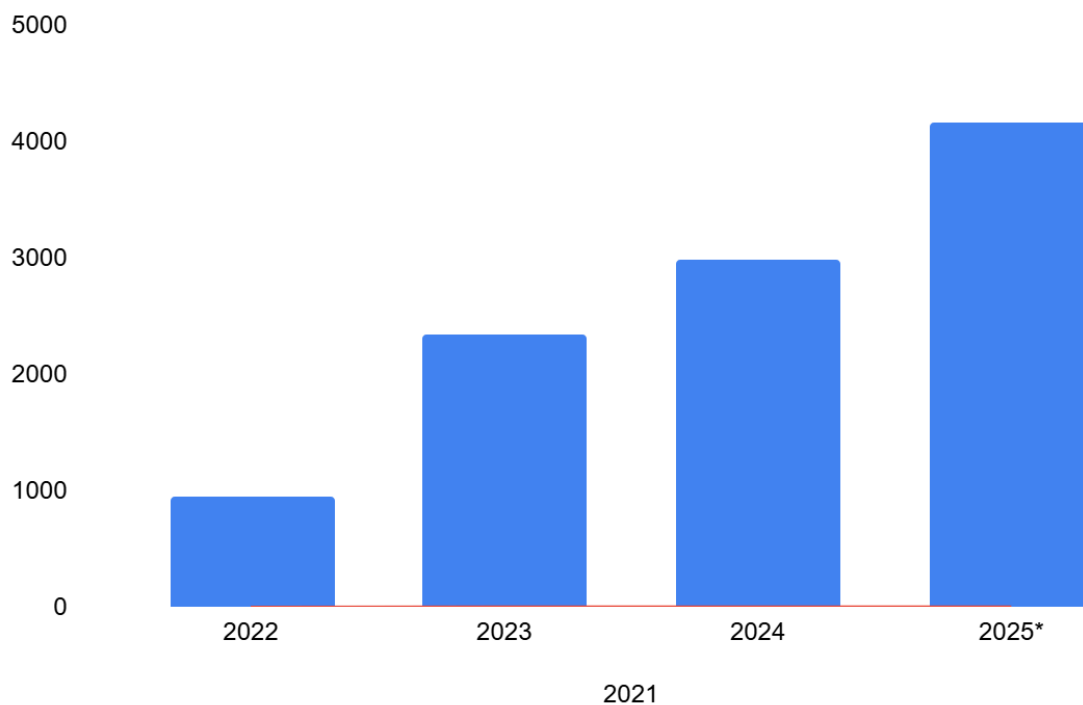
- Growth: The number of loans and business Synergy facilitated increased by many folds \$ from 2.6 million in 2021 to \$12.5 million in 2025 - an increase of almost 380% in just four years.
- Automation : The automation had a clear turning point. The growth increased to around 58.2% in 2025. This acceleration happened because of the automation tools launched in June.
- Growth: Before the automation phase, Synergy had an increase of around 45%. After the automation phase, it increased to around 90%.

Deal Volume and Capacity:

Beyond just the funding amount, the number of deals closed showed us how much work Synergy was able to handle.

Table 2: Number of Deals Closed Annually

Year	Deals Closed	Year Over Year Growth
2021	885	Baseline
2022	956	8%
2023	2357	146.50%
2024	2985	26.60%
2025	4164	39.5%



Some of the key findings that we discovered were:

- The total deal volume increased from 885 in 2021 to 4,164 in 2025, which showed an overall increase of around 370.5%
- The deals per employee improved from 2.2 annually in 2021 to 10.4 in 2025 which showed an overall increase of around 372.7%.

Table 3 : Lead response time

Period	Average Response Time (Days)	Change from Baseline
Pre-Automation (2021-2024)	4	Baseline
Post-Automation (Jun-Nov 2025)	1	-75.00%
Improvement	3 days reduction	4x faster

Some key findings

- The overall lead response time improved from 4 days to just a day, which showed a 75% reduction
- While the same hour response was still not achieved, the improvement from 4 day to 1 day response showed a very good improvement, which may increase our market much more and let us beat our competitors.

Table 4 :

Period	Retention Rate	Change from Baseline	Key Interpretation
Pre-Automation (2021–2024)	35%	Baseline	Standard client loyalty for the period.
Post-Automation (Jun–Nov 2025)	45%	+28.6% Improvement	Significant jump in client loyalty.
Net Improvement	+10 percentage points	—	A clear, meaningful gain in customer retention.

Some key findings included

- The customer retention improved from 35% to 45%, which showed an increase of around 28.6%.
- There was also an improved retention period which showed an enhanced and better customer experience. This showed reduced errors and much more better professional interactions

4.3 Respondent Demographics

Table 5: Age Distribution

Age Group	Frequency	Percentage
26-30	24	68.6%
31-35	9	25.7%
Over 35	2	5.7%
Total	35	100%

Here we can see majority of respondents around (68.6%) fall within the 26-30 age group, showing a young workforce. It is then followed by aged 31-35 group comprising of 25% while only 5.6% are over 35 years old. This shows that Synergy has a younger core of group.

Table 6 : Gender Distribution

Gender	Frequency	Percentage
Male	31	88.6%
Female	4	11.4%
Total	35	100%

Majority of the employees are male with around 88.6%, while female is around 11.4%. This shows that Synergy is more male dominated company.

Table 7 : Experience with Manual vs. Automated Operations

Experience Type	Frequency	Percentage
Yes (Experienced both manual and automated)	33	94.3%
No (Joined after automation)	2	5.7%

4.4 Manual Operations Experience

This section analyzes the responses from the 35 employees who experienced manual operations before automation

Statement	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	Mean
Manual spreadsheets were time-consuming and inefficient	7 (20.6%)	22 (64.7%)	5 (14.7%)	0 (0%)	0 (0%)	4.06
Most time spent on administrative tasks	8 (23.5%)	24 (70.6%)	2 (5.9%)	0 (0%)	0 (0%)	4.18

Duplicate leads were a problem	5 (14.7%)	25 (73.5%)	1 (2.9%)	0 (0%)	0 (0%)	4.12
Manual operations made timely customer responses difficult	8 (23.5%)	21 (61.8%)	3 (8.8%)	2 (5.9%)	0 (0%)	4.03

4.5 Comparative Summary: Manual vs. Automated Operations

Metric	Manual Era (2021-2024)	Automated (2025)	Change (%)	Direction
Average Annual Funding	\$4.4M	\$12.5M	1.84	↑ Improvement
Lead Response Time	4 days	1 day	-75%	↑ Improvement
Leads per Employee	125/month	200/month	0.6	↑ Improvement
Customer Retention	35%	45%	0.286	↑ Improvement
Error Rate	12%	6.50%	-45.80%	↑ Improvement
Deals per Employee	2.2/year	10.4/year	3.727	↑ Improvement

CHAPTER 5: QUALITATIVE FINDINGS - EMPLOYEE EXPERIENCES AT SYNERGY SOLUTIONS

To better understand the human perspective of the changes, an interview was conducted with around 35 employees at every team and level. Their stories and common experiences were analyzed to better understand the company.

More than five major themes were identified that explained how the 400-person team went through with the entire journey, from doing work on manual systems to upgrading to high quality automation, each and every moment was lived and cherished.

5.1 Theme 1: The Grind of the Manual System and Work

Before the whole automation scenario, employees used to work on boring and tedious manual work, which was time-consuming, slow, frustrating and mentally draining.

Interview with different participants

To understand the whole company situation, we sat down with altogether 35 people, consisting of people from each and every department. It included 6 leaders and managers, 10 customer relationship officers, 8 salespeople, 5 IT and Tech members and 2 people from HR. By hearing their side of the story, we made sure the findings reflected the company's overall experience.

More than 80% of the employees had worked through the transition phase from manual to the automated systems, while the rest of 20% joined it after it was complete, so we got the viewpoints of both worlds. This collective group represented all teams and included employees from all operations hubs in Bangladesh with a wide range of tenure, from new hires to long-serving staff. Each and every conversation was private, which had a fixed and guided conversation about their experiences before, during and after the automation.

5.2 Life Before Automation: The Daily Grind

Before the new automation system, the whole work at Synergy was slow and frustrating. Employees wasted most of their time in a day working on manual data entry and checking spreadsheets for duplicates. Passing the customer between teams and re-entering the same information took more time than expected. Finding out simple information among scattered emails and files made life harder. Such tedious work left little time to bond with customers, the initial work that was supposed to be done.

5.3 Fragmented Data and Inconsistent Access

Finding daily information was a bit of a challenge as nothing was in one place - most of the customer details were lost in emails, and Most of the routine tasks required manual correction from multiple sources. For example, our operations manager had to manually find previous leads and deals manually going to spreadsheets and searching them. If that deal had been funded or had been called in the last few months, the lead would have been declined. Now, for every generated lead, such a thing had to be done. And others were in a disorganized space.

5.4 Psychological Impact

Beyond just the old tools of working, other things such as job security, took a real toll on people. Employees felt frustrated as they felt that their roles were misaligned and did not align well with their skill set and goals. They were hired as customer officers and professional business relationship advisors, but the majority of their day went by due to low-value clerical work.

5.5 Technological Fears

Aside from losing their jobs, many employees were also afraid that they couldn't learn and adapt to the new system. This was true for long-time staff who were old and were accustomed to their old routines.

5.6 Unclear Communication

When the change was announced, the message was quite unclear. Employees were told that they were getting a new system, but not what that would actually mean for their everyday routine. Such a lack of detail ultimately created more anxiety than clarity.

5.7 The Learning Curve and Adaptation Process

Learning the new system was a challenge, but it was a process in itself. The whole success did not come from just the software alone, but needed strong training, teamwork and training and also the people to learn the whole thing at their own pace.

Training : The company offered two weeks of hands-on training to the employees before the launch. The employees were given extensive training and were assured that they could implement the whole system. But many questions arose, like the training did not cover any real-world situation, and most of the things did not align well with the work and policies of the company.

5.8 Faster Workflow

After the new system was mastered, the employees experienced some clear and powerful improvements in how they worked, and the automation helped with major benefits, providing better efficiency, better service and effective management.

Winning the customers back

The biggest win was the time that was won back. Employees spent most of their time, around 60-70% of the time, on manual processes. But it was not the same anymore, as it dropped to just 10-15% now. One of the sales officers quoted: The system handles the data entry, and now most of the day is spent talking to customers and building effective relationships. Like a salesperson who goes by the name: Shovon Gomez, quoted saying: " I can handle nearly twice as many deals now, by not working more hours but by not manually underwriting the papers. This clearly explains the 60% increase in overall productivity.

5.9 Summary of the Qualitative Findings

The whole summary of the employee interviews was a part of a clear five-stage journey of the changes at Synergy. It started with a team that was under the heavy pressure of manual work, which was inefficient and frustrating. When automation was announced, another fear took over: of fear of job loss, not being tech-savvy enough, etc.

Once the learning phase was over, the benefits were really dramatic as most of the employees won back most of their day from administrative tasks, and now could easily access the full customer history. A clear, automated, and professional service followed.

So, the key lesson was that Synergy's success was not only about installing new software but because about a human-centred approach to change: clear communication, strong support among each other, and learning together. By focusing and investing in its people, Synergy turned resistance into enthusiasm and unlocked the full potential of its investment.

CHAPTER 6: RECOMMENDATIONS

6.1 Recommendations for Synergy Solutions

Short-Term Recommendations (0-6 months):

- Review and Refine : Identify main pain points and gather relevant employee feedback.
- Extend Automation : Develop a roadmap to automate any remaining manual process.
- Launch Training: Try to launch and develop advanced analytical features, customization.

Long Term Recommendations (6-24 Months):

- Use data in a better way: Use the accumulated CRM data to build models for lead scoring and maximize resources.
- Expansion: Investing in new markets like Australia, the UK, Europe, etc.

CHAPTER 7: CONCLUSION

This research clearly follows Synergy's journey from slow, manual work to a much faster, automated way of doing business. By combining the numbers with the employee stories, we saw a clear picture of the way things changed and why.

The Results Showed:

- Business boomed as the total funding amount increased by 380% and the number of deals jumped by 370%.
- Sales cycle shortened by 38%, response times improved by 75% and errors dropped by 46%.
- Customer retention rate increased by 29%

The next thing for Synergy is:

- Understand the benefits that Synergy can bring and track its journey for the next 2-5 years
- Compare what rival companies are doing and find the best strategies
- Understand how AI can help Synergy better
- Ask customers about their experiences

Synergy's transformation is all about the real change of people, not just technology. The company succeeded because it supported the team through each and every of the actions. The old fear that "robots will take our jobs" was replaced by a powerful new reality : automation took over the boring tasks, so people could focus more on meaningful work.

The future is Synergy now.

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CHAPTER 9: Questionnaire

Questionnaire

Section A: Profile of the Respondent Name (Optional): _____

1. Age Group:

- ☐ 20–25 ☐ 26–30 ☐ 31–35 ☐ Over 35

2. Gender (Optional):

- ☐ Male ☐ Female ☐ Don't want to say

3. Department:

- ☐ Sales
- ☐ Operations
- ☐ HR or Administration
- ☐ IT and data support
- ☐ Other (Please explain): _____

4. Title:

- ☐ Intern / Trainee ☐ Executive ☐ Team Leader ☐ Manager ☐ Other: _____

5. Years of Work at Synergy Solutions:

- ☐ Less than six months
- ☐ 6 to 12 months
- ☐ 1–3 years
- ☐ Over 3 years

6. Total Number of Hours worked per week

☐ Not more than 40 ☐ 40–50 ☐ Over 50

7. Did you work at Synergy before the automation?

☐ Yes (experienced both manual and automated operations)

☐ No (joined after automation implementation)

Section B: Experience with Manual Automation

Please tell us how much you agree with the following statements.

(5) Strongly Agree (4) Agree (3) Neutral (2) Disagree (1) Strongly Disagree

9. Manual spreadsheets are time consuming and inefficient.

☐ 5 ☐ 4 ☐ 3 ☐ 2 ☐ 1

10. Most of the time is spent on administrative tasks like - data entry, spreadsheet updates

☐ 5 ☐ 4 ☐ 3 ☐ 2 ☐ 1

11. Duplicate leads - multiple entries are a frequent problem.

☐ 5 ☐ 4 ☐ 3 ☐ 2 ☐ 1

12. Manual operations made it difficult to provide timely and accurate results to customers.

☐ 5 ☐ 4 ☐ 3 ☐ 2 ☐ 1

Section C: Experience with Manual Automation

13. When automation was announced, I was concerned about my potential job loss.

☐ 5 ☐ 4 ☐ 3 ☐ 2 ☐ 1

14. I felt anxious and worried about my ability to learn new technology systems like the CRM.

☐ 5 ☐ 4 ☐ 3 ☐ 2 ☐ 1

15. The management communicated clearly about why automation was necessary and how it would benefit the employees and the company in the longer run.

☐ 5 ☐ 4 ☐ 3 ☐ 2 ☐ 1

16. The training provided by Synergy helped me prepare to use the CRM system.

☐ 5 ☐ 4 ☐ 3 ☐ 2 ☐ 1

17. The IT and support team were very responsive and helpful whenever I encountered any problems.

☐ 5 ☐ 4 ☐ 3 ☐ 2 ☐ 1

18. The whole management was very supportive and patient during the whole learning period.

☐ 5 ☐ 4 ☐ 3 ☐ 2 ☐ 1

Section D: Usability of the CRM System

19. The CRM System is user-friendly and easy to use.

☐ 5 ☐ 4 ☐ 3 ☐ 2 ☐ 1

20. Each and every required information I need is within the CRM system.

☐ 5 ☐ 4 ☐ 3 ☐ 2 ☐ 1

21. The automated workflow in the CRM guides me through the whole process clearly.

☐ 5 ☐ 4 ☐ 3 ☐ 2 ☐ 1

22. The CRM System successfully prevents duplicate lead contacts.

☐ 5 ☐ 4 ☐ 3 ☐ 2 ☐ 1

23. The Key Performance Indicators (KPIs) that are used to measure or analyze the marketing campaign's success are clear and well-defined.

☐ 5 ☐ 4 ☐ 3 ☐ 2 ☐ 1

Section D: Usability of the CRM System

24. Automating marketing tasks like CRM integration and email campaigns has made it easier to turn leads into customers.

☐ 5 ☐ 4 ☐ 3 ☐ 2 ☐ 1

25.By using the CRM system it has significantly reduced the time that I spend on administrative tasks.

☐ 5 ☐ 4 ☐ 3 ☐ 2 ☐ 1

26.Each and every customer information can now be found instantly rather than searching through spreadsheets.

☐ 5 ☐ 4 ☐ 3 ☐ 2 ☐ 1

27.The CRM system has improved coordination between departments at Synergy.

☐ 5 ☐ 4 ☐ 3 ☐ 2 ☐ 1

28.Automation has reduced errors in data entry and customer information processing.

☐ 5 ☐ 4 ☐ 3 ☐ 2 ☐ 1

Section E:Customer Service Impact

29. Automation in the form of CRM has made the post-client acquisition process easier and faster, making the time to disburse the loan faster and easier.

☐ 5 ☐ 4 ☐ 3 ☐ 2 ☐ 1

30.The CRM system has enabled me to provide better service to the customers.

☐ 5 ☐ 4 ☐ 3 ☐ 2 ☐ 1

31.Customers are now receiving faster and better responses to their inquiries since automation was implemented.

☐ 5 ☐ 4 ☐ 3 ☐ 2 ☐ 1

32.The CRM system helps ensure consistent service quality across all customer interactions.

☐ 5 ☐ 4 ☐ 3 ☐ 2 ☐ 1

Section F:OVERALL ASSESSMENT

33. On a scale of 1 to 10, how would you rate your overall experience with Synergy's digital transformation?

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☐ 10

34. On a scale of 1 to 10, how would you rate the CRM system's impact on your daily work?

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☐ 10

Section G:Open Ended Questions

35. What is the single biggest benefit of automation at Synergy?

36.What are some of the things about the CRM that can be improved?

Date: August 5, 2025

Ref: SSCC/CRO/19/344

To,

Abdullah Al Mahmud (Touhid),

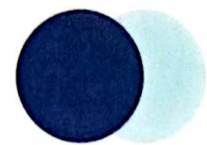
Address: House-08, Road-14, Section-C, Mirpur-10, Dhaka-1216.

Dear Abdullah Al Mahmud (Touhid),

Appointment

With reference to your application and subsequent interview with us, we are pleased to offer you engagement in SYNERGY SOLUTIONS as “Customer Relations Officer” on the following terms and conditions:

1. Your above position with SYNERGY SOLUTIONS is purely temporary and it shall remain valid for a period of six months from the date of you joining on **August 5, 2025** which will end on **December 31, 2025**, unless extended by the company at its discretion.
2. Your appointment is subject to successful completion of the training period. You are engaged to perform your duties at our company under Operations Department and render services in the position of “Customer Relations Officer” or as may be assigned by the company from time to time.
3. You will report directly to the Operations Manager, under Operations Department, your direct supervisor.
4. Work Place: Your present place of work will be at Mirpur, Dhaka but during the course of the service, you will be liable to work from home at any of the Company's Projects at the sole discretion of the management.
5. Your working hours will be eight hours (excluding one hour lunch/dinner break etc), five days a week.
6. Salary: Your salary will be hourly basis, **BDT 60/Hour Work + (Attendance Bonus: BDT 2000 + Transportation allowance: BDT 1000)/per month** as earned will be treated as consolidated pay by pay order or wire transfer into your bank account.
7. Sales Commissions/Incentives: In addition, you will be entitled to sales commissions for each qualified sales or incentives as appropriate which will solely depend on the types of campaign and at the management discretion. All successful CRO after the training will be briefed regarding the commission structure.
In SYNERGY SOLUTIONS Performance Appraisal take place by tri annual. After successful completion of your **Performance Appraisal –III**, you may also be entitled to Festival bonus which will be as per the bonus scheme in existence.
8. Leave/Absence: Before successful completion of your **Performance Appraisal –III** no paid leave will be entitled. Absence for a continuous period of Five days without prior Approval of your Supervisor/HRM, (including overstay on leave / training) would result in your losing your lien on the service and the same shall automatically come to an end without any notice or intimation.



SYNERGY
SOLUTIONS.

9. The company reserves the right to deduct from your monthly wages or other dues payable to you any amount owned by you to the company.
10. Your salary is confidential and you will not disclose your salary, job group & other terms & conditions to anyone in or out of the company.
11. SYNERGY SOLUTIONS will impart the employee extensive training on BPO and Call Center at its own arrangement. For this SYNERGY SOLUTIONS will incur expenditure including the cost of materials, training resources and agreed salary & benefits for the training period. Following conditions will be applicable:
 - a) Training will be at least of 8 hours per day for 5 days a week.
 - b) After completion of the training it will be mandatory on your part to work with SYNERGY SOLUTIONS for a minimum of six months from the date of your assumption of the jobs as would be assigned.
12. You will be on probation for a period of 6 months from the date of your joining. During probation period your employment can be terminated by SYNERGY SOLUTIONS without assigning any reason there for and without payment of any compensation.
13. You will not engage in any other employment, either paid or unpaid, during the term of your service without first obtaining written permission from the company.

You are to signify your acceptance of this offer on the terms and conditions above mentioned by signing the duplicate of this letter and return the same to the company by **August 5, 2025**.

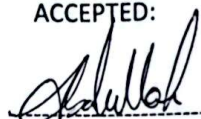
Yours truly,

For and on behalf of SYNERGY SOLUTIONS


MD. Rifad-Al-Farhad
HR Manager



ACCEPTED:


Name: Abdullah Al Mahmud (Touhid)
Date: August 5, 2025

SYNERGIZE Business



INTERNSHIP PROPOSAL FORM

Name:	Abdullah Al Mahmud
ID:	221011037
Department:	BBA
Supervisor's Name (Faculty):	Parvez Mahmud
Organization Name:	Synergy Solutions
Internship Title:	Optimizing Operational Efficiency and Market Penetration : A Comprehensive Analysis of Automation And Marketing Strategy at Synergy Solutions

Student's signature & date

Supervisor's signature & date

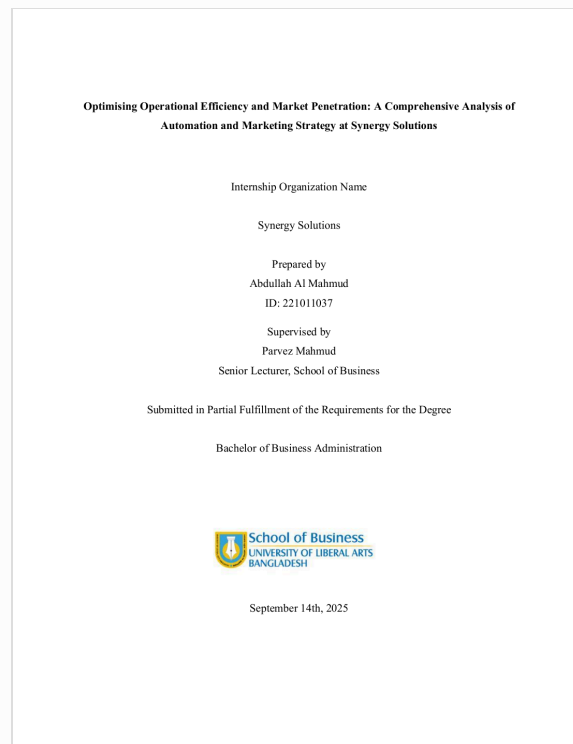


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