



HOW A LEADING FINANCIAL INSTITUTION INCREASED ITS SALES EFFICIENCY USING MICROSOFT DYNAMICS CRM



ENTERPRISE
RESOURCE
PLANNING

BACKGROUND

- Our customer is the holding company of the leading banking group. It operates through five divisions: Retail, Corporate, Insurance & Investment, International and Treasury & Asset Management. The Company's Retail range of products includes personal and business banking products and services to 23 million customers.

Industry	BFSI
CRM Module	Sales
Integration	COG, Goldmine, Audit Component
Operating System	Windows Server 2003
CRM	Microsoft Dynamics CRM 3.0
Database	SQL Server
Integration method	Web services

CHALLENGES/ OBJECTIVES

- Our Client's corporate division was looking for a solution implementation that would automate its Customer Acquisition and Sales Enablement (CASE).
- The application is to become a way of life for 2000+ Corporate employees across the world .The solution was required to facilitate Corporate effectively and efficiently manage their Company, contacts, leads/ opportunities and also interface with legacy applications at Corporate division.
- The solution was also expected to provide deeper insight into the customer performance trends

HCL'S ROLE

- Microsoft Dynamics CRM 3.0 Application Design
- Customization and Configuration of Microsoft Dynamics CRM 3.0 to suit client processes
- Integration services with legacy applications
- Onsite–Offshore Delivery Model
- Maintenance
- CASE Functional Enhancements

BENEFITS

- Improve customer perception of the Corporate Commercial Banking proposition and services
- Deliver improved sales results, through increased sales management efficiency and effectiveness.
- Integration with Outlook allows all calendar items, email contact, and tasks to be attached to specific leads and opportunities, which is also visible across the business. The key benefit here is full visibility of specific activity on a customer across the business, while retaining existing Outlook business process.
- Generate additional sales volumes and cross sales leads to other lines of business through improved and more streamlined business processes.



www.hcltech.com

Hello there! I am an Ideapreneur. I believe that sustainable business outcomes are driven by relationships nurtured through values like trust, transparency and flexibility. I respect the contract, but believe in going beyond through collaboration, applied innovation and new generation partnership models that put your interest above everything else. Right now 105,000 Ideapreneurs are in a Relationship Beyond the Contract™ with 500 customers in 31 countries. **How can I help you?**

Relationship[™]
BEYOND THE CONTRACT

HCL