

# Case Study



## Client Profile

### Organization

Major credit union

### Size

Over 2,600 employees

### Industry

Financial services

One of the largest credit unions in Canada, this client has \$14.5 billion in assets, over 407,000 members and 61 branches

The client's products and services fall into three main categories:

1. Personal banking
2. Business banking
3. Investments

## FINANCIAL SERVICES CRM

### Business Needs

The client had several sales automation tools, spread across various departments. A decision was made to create a single, centralized CRM system that would:

- Be easier to maintain
- Ensure fast adoption and effective usage
- Provide managers and staff with a unified view of every customer

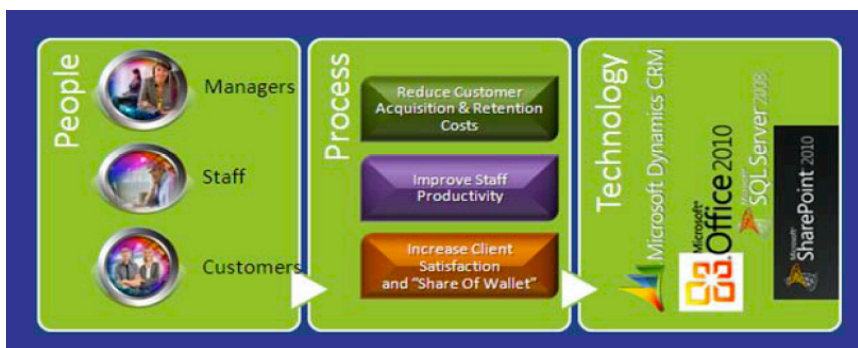
### Solution

Knowledgetech deployed an industry-specific CRM, built from elements of Microsoft Dynamics CRM Online, Office, SQL Server and SharePoint. This solution empowered the client to:

- Centralize customer information and share it across departments
- Service customer requests more rapidly
- Improve cross-selling and up-selling opportunities

### Benefits

- Empowered staff to be more productive
- Maximized customer satisfaction
- Increased share of wallet
- Reduced customer acquisition costs
- Reduced customer retention costs
- Minimized IT spend and technical complexity



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