

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 include:

- Personal banking
- Business banking
- Foreign exchange
- Mortgages and loans
- Investment advice

FOREIGN EXCHANGE C.R.M.

Business Needs

The client was using multiple CRM platforms, spread across departments and was in the process of creating a central system that would give staff throughout the organization a unified customer view. Making this system available to the Foreign Exchange department was a high priority. Foreign Exchange was using a very basic sales force automation tool to manage customer information and was unable to access relevant data from other departments.

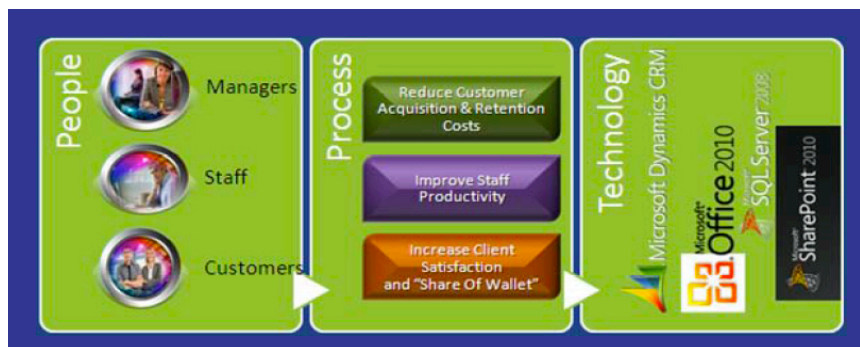
Solution

Knowledgetech deployed the client's central CRM system across the Foreign Exchange department. This system was built upon elements of Microsoft Dynamics CRM Online, Office, SQL Server and SharePoint. The deployment was designed to be aligned with:

- The client's corporate strategy for relationship management
- The specific relationship management needs of a sophisticated foreign exchange organization

Benefits

- Supported the organization's long-term IT strategy
- Replaced an outdated sales force automation system with a state-of-the-art CRM
- Made data from across the organization available, to give Foreign Exchange staff the most complete client view possible
- Maximized customer satisfaction and share of wallet
- Minimized customer acquisition and retention costs



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