TRIGENT

Investment Consulting Firm Improves Operational Efficiency using SharePoint and CRM Technologies

Microsoft Partner
Gold Application Development
Gold Collaboration and Content

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Client Profile

The client, headquartered in Massachusetts, is the industry's largest, independent, full-service investment consulting firm, serving over 300 retainer clients with total assets worth over $900 billion. The company provides asset and investment policy services and works with Corporates, Endowments, Foundations, Insurance and Private Wealth investment programs on both an advisory and discretionary basis.

The Challenge

- The client has multiple office locations across the US, which led to information silos. In the absence of seamless data flow, valuable customer information was stored in over twenty different Microsoft Customer Relationship Management (CRM) modules and related documents rested in SharePoint, which served as both intranet and extranet portal for the client.
- The manual process of acquiring fund related data, processing it and then capturing the details in the main system was time consuming. It was also prone to be inaccurate with frequent incidents of data slippages. The team which worked on data processing spent most of their work time in accessing data that was often out of date and possibly inaccurate.
- The client's customers, as a result of the manual processes and information silos had no real-time visibility into their investments and related details. Their queries were tackled manually, with reports being printed and shipped resulting in long waiting periods which impacted existing relationships.
- Finally, the client did not have a secure channel to share confidential information.

Trigent Services and Solution

Trigent's engineers worked on an integrated solution using CRM, SharePoint and Microsoft Office for real-time data access and accurate data dissemination. Data synchronization between the new application, existing records and the CRM, eliminated information silos and ensured seamless information flow.

They introduced templates for structured data capture to ensure data completeness and reduced process time. The data, stored in a SharePoint-based repository enabled the customer relations team to access customer related data in one single location.

The manual process gave way to a secure online system, simplifying information access for customers. Data would get published from the intranet after verification and be readily accessible for customers on the extranet.

Fund reports were forwarded to generic email IDs by individuals. Emails were stored in the document library and the assigned user could then classify the report based on fund, month and class of fund.

The dashboard provided a quick snapshot of the current status of a process, based on the person accessing the page. The concerned stakeholder could then update the system and mark the action as complete. The application also generated exception reports to highlight the funds for which reports were not received.

Finally, the application provided an online medium to share investment and relationship information securely with the client's customers.

Technology Stack

- SP 2010 Enterprise (On Premise)
- SQL 2008 Standard
- MS Dynamics CRM 4.0
- MS Office 2010

Engagement

- SharePoint Design & Architecture Service
- SharePoint Implementation Service

Integration

- MS dynamics CRM 4.0
- MS Office Word – OpenXML

Client Benefits

- Structured data captured at source by consultants ensured completeness of data and resulted in drastic reduction of overall process time.
- Automated workflows with rules, based on CRM data reduced overall process timeline by 60 percent.
- SharePoint-based repository and search reduced the search time by 90 percent.
- Digitization of content allowed it to be shared with customers as value-added service leading to an additional revenue channel.
- Customer query resolution time was reduced by 35 percent. This quicker turnaround time

has improved customer satisfaction. Also, it reduced incoming queries to the CRM team by 70 percent and lead to new value-added service to share research content with client resulting in one more additional revenue source.

- Reduced operational cost due to reduction in queries, automated notification on changes and paperless sharing of content.
- No slippages in terms of data accuracy recorded after the solution was implemented.