CASE STUDY

Development of a CRM tool for Financial Planners

Customer

A Minnesota based entrepreneur had devised an innovative method of personalizing each touch point with clients who were primarily financial planners. This system allowed the financial planners to contact their clients via personally "handwritten" notes, conveying the care and warmth that would be provided to their investments. This system provided for a low cost high volume communication to be sent to clients in one's own handwriting so it looked very personal.

Project Objective

To design, develop and deploy a specialized CRM product for Financial Planners with the ability to lend personalization features not available with conventional CRM tools in the market. To architect the product to be deployed in Software as a Service (SaaS) model.

Customer Challenges

The customer being a startup did not have the technical team to create the product from conceptual stage. The founding team had very little technical expertise and needed to produce quick prototypes of the concepts.

Trigent's Solutions

Trigent recommended Software-as-a-Service (SaaS) model to deliver the technology solution for financial planners. This involved translating the concepts to a technology solution. This was accomplished by:

- Creating and refining requirements via constant interaction with the founders
- Utilizing several third-party tools and services for speed and ease of integration
- Providing quick turnaround for numerous prototypes and finalizing the product design
- SaaS deployment allowed easy client sign on and ramp up. Customers could access system from anywhere
- Integrated CRM system helped develop better communication channels
- Design allowed expansion of client base beyond the financial planning markets into other domains
- Scalability allowed both small and large clients to be serviced with equal ease
- The total cost of ownership is much cheaper because of lower cost of implementation and deployment

Client
A Minnesota based entrepreneur, with an innovate idea to build a personalized CRM product for Financial Planners.

Project Objective
To design and develop a CRM product for Financial Planners with the ability to lend personalization features. To architect the product to be deployed in SaaS model.

Technology
- ✓ ASP .Net
- ✓ C#
- ✓ MS SQL Server
- ✓ JavaScript, XML
- ✓ COM Objects
- ✓ Windows Services

Benefits
- ✓ SaaS made it Suitable for small and large clients
- ✓ Help develop better communication channels
- ✓ Improve customer responsiveness and build customer loyalty
- ✓ Reduced TCO

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