

Case Study

Client Information Base (CIB)

Project Overview

Our client is a leading international and retail asset management specialist, ranking as one of the top five UK retail investment institutions. They had a requirement to implement an in-house Customer Relationship Management tool allowing a single point of data entry for all client information.

The system, CIB, provided a centralised data repository ranging from basic names, addresses and telephone numbers to highly detailed information such as portfolios held, valuation information, contact details and client events. A further feature of the system was the facility to generate detailed reports together with the ability to filter and sort data according to specific requirements.

As CIB was vital to the way our client conducts its business it was imperative that all employees, both existing and new, were fully conversant with using the system and ensuring all data entered was of the highest integrity.

Initially the system had been installed on users desktops with no formal training provided. The result of this approach was the failure of the system where, at one point, senior management were asking for the system to be removed.

The Solution

Evaluate the business processes and suggest a methodology and training solution by which the project could be saved. Our innovative approach to match roles to a training programme ensured courses were tailored to meet individual and business needs, allowed us to turn a project disaster into a major success. Implementing the CIB system was particularly complex as many other back-end accounting legacy systems were integrated into the system.

A variety of CIB courses were developed in line with job role profiles and full supporting training documentation was developed on the features of CIB encompassing the following features:

Client Information: Central and secure storage of contact details (names, addresses, telephone numbers, etc.) and other client information (fee basis, restrictions, objectives, etc.). Both existing and prospective clients could be recorded within CIB.

Reporting Requirements: Information could be printed from CIB to create reports, or could be extracted to be used in other applications (e.g. in Word or Excel spreadsheets).

'Event' Recording: The facility to store brief notes of events such as telephone conversations, meetings, functions etc. Dates, contact names, event types and documents were stored against each note and a full history of events was maintained.

Snapshot of Project:

Client

- Leading asset management specialist

Project

- Client Information Base

Solution

- Developed tailored training solution which paired user and business needs with software use
- A variety of CIB courses were designed in line with job role profiles and full supporting training documentation was developed

Project Achievements:

- CIB training is an on-going solution within our client's organisation
- As the system is ever-evolving training updates must be delivered to the organisation to keep all employees abreast of any changes and updates. This has meant that we worked closely with the developers playing a key role in testing upgrades and developing the system to its current potential
- While the software did not change, the success of the project was through the matching of the business requirement with the needs of the individual users. The result was a CRM system that is effective and crucial to our clients' business