

ČMSS: CRM system for effective client management

How we delivered an advanced solution
for customer relationship management to ČMSS



Providing quality customer service is on the first place for us. Implementation of CRM system by Millennium provided for us the foundation not only for reaching better knowledge of our clients and improving the quality of relations with them, but also for dealing with business opportunities. “

Ing. Petr Tomášek

Department manager
Sales processes and applications

The Microsoft Dynamics CRM logo is displayed on a laptop screen. The logo features a blue icon of three stylized sails to the left of the text 'Microsoft Dynamics CRM' in a blue, sans-serif font. The laptop is white and is shown from a slightly elevated angle, resting on a light-colored surface.

End User

Českomoravská
stavební spořitelna

Solution

Implementation of CRM system
in ČMSS as a part of CBS (Core Ban-
king System) exchange program.

Client Profile

Českomoravská stavebná sporitel'ňa, a.s. (ČMSS) is the largest building society in the Czech Republic, known also as the "Fox". It operates on the Czech market since 1993 and during its existence has achieved an excellent reputation. It has signed almost 5.6 million building savings agreements with its clients and over a million of loans and mortgages.

ČMSS is a member of the ČSOB group, which maintain its leading position on the Czech financial market.

Initial Situation

Millenium has provided CRM system to the company ČMSS as a sub provider of the Asseco Central Europe Company. The building society has chosen Microsoft Dynamics CRM as the platform enabling gradual development of the system.

CRM is one of the basic systems of Českomoravská stavební spořitelna. Its design, implementation and deployment were carried out in the frame of a big project of the substitution of all main bank systems. First deployment of CRM system was engaged by basic agenda, which has not been able to satisfy business needs of ČMSS and serve the clients efficiently.

The absence of an effective system for customer relationship management has allowed us to apply Microsoft Dynamics CRM to the project of bank system exchange, which is labelled as „Program CBS“ (Core Banking System).



Project objectives

Among basic objectives of CRM implementation to the environment of ČMSS belong:

- Providing data to end users on people and products that come from other company systems in a transparent and consolidated view - so-called 360-degree customer view;
- The management of client service, so called administration of conditions, defined according to rules and criteria;
- The management of geographic structure that ensures classification of clients in service of sales representatives
- Consolidation of client data and unification and deduplifying of data from source systems of the ČMSS company;
- Support for the marketing department by easy planning of marketing campaigns and preparation of individual marketing activities.



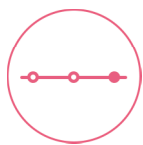
Solution

Individual function parts were designed as independent modules of CRM. CRM application is customized so that it includes entities, views and forms for the system as 360-degree views, also with modules, which were implemented as:

- administration of conditions – a module which solves functionalities related to customer service or potential clients (prospects) ;
- administration of regions – a module which enables the evidence of regions and territories, and to them related parameters ;
- client entries – a module of client entries evidence which includes especially ČMSS client complaints ;
- code lists – administrative interface of code list data management;
- settings – administration of CRM system settings.

A substantial part of implementation was aimed at the CRM system integration. The integration was designed according to defined patterns. We distinguished integrations:

- Batch – dealing with batch data transfer, briefly ETL. This integration was divided to daily dosage processing and so called NTO processing (Near To Online). Over 150 million records are processed everyday within the daily dosage integration.
- Online – online integration was secured by Web services. All calls of web services by CRM implementation went through integration platform of the ČMSS company, WAS ESB.



Project Development

CRM project was one of the projects of the overall CBS program and initialized in the middle of 2013.

Within the first analysis stage an intensive cooperation was held to work out function specification. This stage was carried out in the form of intensive workshops, on which the client not only got to know the application of Microsoft Dynamics CRM, but also screens were created and functionalities were designed. The specification was created together with client with the use of Enterprise Architect tool where all additional changes and technical design were recorded afterwards.

The second stage of the project after the approval of the analysis was the development. The development stage began at the beginning of 2015. Regarding the extensiveness and the time plan of the development checkpoints of quality in the form of presentations were arranged. Developed functions, shift in development and approvals of already developed parts were presented. These presentations served as feedback from client and at the same time client was assured that we approach our mutual goal.

The migration of data from existing systems and CBS systems to CRM alone represented an inseparable and one of the most challenging parts of the project. The preparation of migration rules, implementation and subsequent testing lasted from the development stage till the final migration itself. Testing ran in monthly intervals during 2015 until March 2016. Final number of migrated data to CRM was 178 millions of records. The development was completed in March 2015.

The development stage was followed by testing stage which preceded by SIT and UAT tests. Individual tests ran according to predetermined executive plans of testing and via testing scenarios, which were arranged for SIT stage by us and for UAT stage by our client. During this stage also training of lecturers and preparation of project documentation, such as operational documentation, installation guidebook or user documentation were held.

Deployment of solution to production environment and launch commonly with the whole CBS program took place in March 2016.



We have gained significant benefits

1. Through CRM the company was provided with a platform for further development of the system. Microsoft Dynamics CRM 2011 was chosen by the ČMSS company as strategic platform for CRM related agenda development.
2. CRM brought to end users an intuitive and well-arranged user interface in the style of Microsoft Office products that offers higher comfort and easier user adoption.
3. Users see in CRM aggregated data from several systems of ČMSS which would be otherwise difficult to show.
4. CRM replaced in ČMSS some mini-agendas which were registered in Microsoft Excel files before. It is related to helping evidences, such as control of sales representatives. ČMSS acquired application support for these evidence mini-agendas.
5. A 360-degree view on existing clients was gained via single platform, which will lead to decrease of costs for software solution in the long-run.



Used Technology

CRM in the company ČMSS was implemented in CRM 2011 version, because this version was the latest and available in the time of analysis.

Following products and technologies were used in the project:

- Microsoft Dynamics CRM 2011
- SQL Server (SQL Server Reporting Services, SQL Server Integration Services)
- SOAP 1.1 WS (integration)
- Enterprise Architect (analysis)
- NET Framework (CRM extension modules)
- JScript, DHTML, REST, Odate (CRM extension modules)



Our awards

16x

Microsoft
Industry Awards

→ Winner

 Slovak Republic

3x

Microsoft
Industry Awards

→ Finalist

 Slovak Republic

4x

Deloitte.
Technology Fast 500™

Microsoft Partner

2014 Partner of the Year **Winner**
Slovakia

Microsoft Partner

Gold Customer Relationship Management
Gold Collaboration and Content
Gold Application Development
Silver Devices and Deployment
Silver Cloud Platform
Silver Data Analytics

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