

Slovenská sporiteľňa:

CRM for Client Management in the Small and Medium-size Enterprises Segment

How have we simplified work for Slovenská Sporiteľňa with their SME segment clients and made it more effective.



We are yet again closer
to our clients!

In the beginning of July 2014 in cooperation with the company Millennium we launched a new corporate customer care tool – Microsoft Dynamics CRM – in the business centers of Slovenská sporiteľňa bank. We succeeded to manage the entire preparation and implementation into practice in a record-breaking time. The application is bringing many benefits.

I can see them especially in simplification of work with client data and in effective management of sales activities and business opportunities of corporate consultants. Centralization of SME client data will enable communication in the market, which is more transparent, and sharing information among the business lines of the bank, including involvement of product divisions in corporate client care.

Peter Krutil,

Member of The Board
Slovenská sporiteľňa



End User

Slovenská sporiteľňa

Solution

The platform Microsoft Dynamics CRM 2013 forms the basis of the solution for management of relationships with corporate clients in the company Slovenská sporiteľňa. The system concerned allows a complex overview of the client and at the same time provides a robust platform for further CRM functionalities development and its integration with other applications.

Client Profile

Slovenská sporiteľňa is a banking institution, which has been operating in Slovakia since the 19th century. With respect to volume of assets, **this bank is the biggest one in Slovakia** for the financial year 2013. It provides all kinds of banking products to its clients ranging from current accounts through term deposits, loans and mortgages to services of electronic banking. The bank is a member of the international financial group Erste Group Bank AG.

The bank provides services to retail as well as corporate clients (small and medium-size companies, large companies, financial and non-bank subjects, or organizations from public and non-profit sector). **The clients in the SME segment especially are a promising and dynamically developing group.** The bank prefers active individual approach to clients founded on professional financial consultancy and mutual trust.

Background

Slovak Savings Bank has a portfolio of **more than 30% of companies from the SME segment.** All information about these clients, as well as keeping records of the relationship with them were managed through processed in several systems. Files contained important information on the financial portfolio of the clients, financial parameters for loan approvals, banking products of the client and many other kinds of information. **Data were not available in one place, and informations about customers were processed in several applications.**

The client had experience with CRM system for large corporate clients within the entire group Erste Bank. Slovenská sporiteľňa was thus aware of the benefits the system could bring. Therefore they decided to implement a similar solution for the SME segment in the Slovak Republic as well.



Objectives

- **System creation and customization** for record keeping and client management (including history) in the area of small and medium-size enterprises;
- **Module creation for provision of opportunities and activities overview** and possibilities of solving them with a client;
- **Module creation for provision of a complex picture of opportunities “flow”** from the first contact with a client to closing a contract, or product refusal (so called Sales Pipeline);
- **High transparency and quick access to data;**
- **Integration with MS Outlook;**
- Development, implementation and launch of the solution in ambitious time compared to similar projects – **only two and half months.**



Project Development

The project began with preparation phases in half-April 2014, when we apart from other things realized the first trainings with the client on the possibilities of the MS Dynamics CRM 2013. At the end of April we had a project definition completed and a project plan ready. **The client requested finalization and implementation of the solution in production operation on 1 July 2014**, which only left a time frame for the entire project of two and half months. The time plan was really ambitious. Integration to systems of Slovenská sporiteľňa and other functionalities will be the subject of further solution in the next project phase.

We concluded analysis of the business needs and existing resources, result of which was the functional project specification, at the end of May 2014. The part of development and implementation of the solution followed lasting until the end of June. Within development phase we introduced three prototypes of the system to the client. In half-June we had testing and production environment prepared, which served for trainings of end-users as well. During this period acceptance tests were also realized, bugfixing, migration tests and importing tool was implemented too. The stage of acceptance and trainings of end-users was completed on 27 June 2014, whereby the launch itself took place on 1 July 2014.

Stabilization phase of the project will be over after four weeks following the system operation launch.

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The system is formed by three basic modules: Sales, Marketing and Services. A set of management reports using the **SQL Server Reporting Services** component is a standard part of the Dynamics CRM 2013, whereby specific output sets may be developed for the needs of the company. The Dynamics CRM 2013 also supports data **export into .xls format**. The system enables natively **both-end connection to e-mail server** through CRM E-mail Router component and **differentiated Access of users** of the CRM system to data **via pre-defined security roles**.

The solution developed by our company is based on using and subsequent customization of the module Sales in the Microsoft Dynamics CRM 2013 with complete customization of the "Client's card", which contains all necessary financial parameters including the history.

Information on the clients is synchronized on a weekly basis with Front-end, which is the primary tool for the change of data on clients.

Users have pre-set roles at their disposal with specific access types – for Sales representatives, Account Managers, Product Managers, Managers of Financial Centers. The dashboard provides them updated overview of all opportunities, how to work with clients, which opportunities are open, which are closed and how long is a given matter in process.



What benefits have we achieved?

1. Slovenská sporiteľňa achieved a **full-value solution for corporate customer relationship management in the SME segment in a very short time**. We significantly helped to increase work effectiveness of the authorized sales representatives with their clients and at the same time decrease operation costs, which related to creation, processing and updating of data from various sources into resulting Excel tables.
2. **Higher transparency of data** in a form of complex 360° overview of the client and faster access to clients provided Slovenská sporiteľňa greater space for a more effective communication both in the relationship sales representative – client, and the relationship sales representative – manager. Moreover, we secured saving and effective sharing of all available information (including history), also for cases of substitution of one sales representative by another.
3. **By connecting the standard MS Outlook with MS Dynamics CRM 2013** and the possibility of their synchronization, we **simplified for end-users their planning, as well as processing of activities and meetings with their clients**. This integration also secured smooth and simple transition to the new application.
4. **Our solution enables simple search, overview and selection of current and potential clients, finding out the status of business opportunities and list of planned and actually realized activities**. Owing to automatic dashboards the user has an overview of clients in process based on individual roles from a local viewpoint (business centres), as well as product viewpoint (product portfolio).
5. Owing to our solution the product departments could get involved directly in the customer care, this with a significantly simplified communication between them and the sales departments.
6. Mobile version of the CRM system, which we prepared, allows for higher mobility and freedom of the users. Sales representatives of Slovenská sporiteľňa are thus closer to their clients.

Our Awards

12x

Microsoft
Industry Awards

→ Winner

 Slovak Republic

3x

Microsoft
Industry Awards

→ Finalist

 Slovak Republic

4x

Deloitte.
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Silver Application Integration

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