

Customer Relationship Management

Custom Implementation of Off-the-Shelf System

The Needs

1. A change in business model required the client to aggressively market directly to consumers
2. Client needed a system that tracked every interaction with each prospect and customer

The Solution

Integrant Inc. conducted a complete analysis of the Customer Relationship Management (CRM) solutions on the market. We advised the client to custom implement Microsoft CRM. The Microsoft system was selected because it was easy to customize and provided the client with full control over their data and uptime.

The customized solution included the following value-add functions:

- Custom workflow processes
- Real-time leads for customer service via an online lead generation program
- Lead list de-duping and scrubbing tools
- Integration with internal database
- Integration with online loan application system
- Integration with loan processing system

Discovery and Design Phase

- Defined business needs unmet by current systems
- Defined client's desired processes to determine required functionality
- Evaluated available off-the-shelf solutions to determine the best option for implementation
- Established a gap matrix to determine cost estimates to bridge functional gaps
- Provided a custom design to enable data transfer between

operations, marketing and sales

- Provided an implementation plan to include functional specifications, cost parameters, delivery schedule

Project Implementation

- Provided full project management services including timelines, task assignments, reporting, budgeting, etc.
- Created and executed implementation project plan
- Created and executed training plan
- Installed software
- Custom configuration to meet marketing and sales objectives
- Integrated solution with internal database, public website, loan processing systems

Business Value

The implementation of a customized CRM solution enabled our client to effectively market their product to their target audience. Analysis of the data collected by the CRM enabled marketing to hone their message and accurately calculate the ROI of their marketing campaigns.

The CRM also provided more useable data to customer service representatives. They were able to answer questions faster, reduce call routing and enhance customer satisfaction levels.

Value of Integrant Inc.

Integrant Inc. understands the value of custom implementing off-the-shelf software for certain types of projects. We took a ready-to-go system and customized it to meet the unique needs of our client. As a true partner, we always recommend the best solution for fast and cost effective implementation.

