



Leading Financial Services Organization Takes Customer Service to a New Level

Overview

Country or Region: Ukraine

Industry: Banking

Customer Profile

PJSC "CREDIT AGRICOLE BANK" is a Ukrainian bank owned by one of the largest financial groups and retail banking brands in Europe - Credit Agricole Group (France).

Business Situation

Functional limitations of the preceding CRM system did not allow an adequate service quality increase and the lead/opportunity database growth.

Solution

Microsoft Dynamics CRM was chosen as a new platform to implement the customer relationship strategy because the company has already been using Microsoft products for a long time. Besides, Dynamics CRM is easy to integrate with other programs of the Microsoft Office package.

Benefits

- Business-processes analysis and formalization
- Configuration of standard CRM components and creation of new ones
- Data migration from preceding CRM system to Microsoft Dynamics CRM
- Detailed multi-level testing and QA

"Before implementing Microsoft Dynamics, we have already had experience of using a CRM system. However, the previous systems did not meet requirements of contemporary banking. Our cooperation with SMART business started with the necessity to improve the existing functionality and to update the system, which we have successfully done with the Microsoft Dynamics CRM implementation project."

Eugene Sharov, Commercial Department, Credit Agricole Bank

The Ukrainian branch of Credit Agricole Bank replaces its existing CRM system with Microsoft Dynamics CRM to deliver customer relationships that are characterized by speed, efficiency and knowledge of the customer. As a result both bank and customers are benefiting from the deeper and consistent understanding of business processes delivered by the new system.



“As a result of productive cooperation, we have fulfilled a number of advantages for the customer, including business-process formalization, standard CRM components configuration and new ones creation. Excellence of the joint project team and its synergy allowed analyzing, shaping and fulfilling the bank’s tasks in customer relationships sphere in the shortest terms.”

Denys Shevchuk, Chief of CRM & Collaboration Department of SMART business company

Situation

In 1993, Corporate and Investment Bank Credit Agricole was the first foreign bank to start its business in Ukraine, first operating under the Credit Lyonnais, and from 2004 – under the Calyon brand names. “Credit Agricole Bank”, PJSC is considered a leading foreign bank in Ukraine with regard to its 19-year experience of operating in the Ukrainian market (the bank started its operations 4 years earlier than any other foreign bank in Ukraine), as well as to the quality and reliability of the financial services provided.

Corporate and Investment Bank Credit Agricole is owned by one of the largest financial groups and retail banking brands in Europe - Credit Agricole Group (France). “Credit Agricole Bank”, PJSC is a first-class partner for those industries where the bank operates. With over 160,000 employees, Crédit Agricole serves 49000000 customers in 70 countries.

In Ukraine, Credit Agricole Group also owns Credit Agricole Bank (former Index Bank acquired by the group in 2006), the network of which consists 200 branches and subsidiaries. Credit Agricole Bank specializes on providing retail banking services to private customers and small- and middle-size companies, whereas Corporate and Investment Bank Credit Agricole provides services to large Western and Ukrainian corporations.

There has already been a CRM system implemented, when the decision was made about cooperation between SMART business and Corporate and Investment Bank Credit Agricole. This system was operating on the IBM Lotus platform. However, its functional limitation did not allow an adequate service quality increase and the lead/opportunity database growth. The customer realized a necessity of

transfer to a more modernized and contemporary version of the CRM product.

Solution

The choice was made in favor of Microsoft Dynamics CRM as a new platform of customer relations management because the company has been using and trusting Microsoft products for a long period of time. Moreover, Dynamics CRM can easily integrate with other programs of Microsoft Office package.

CRM-system is a corporate information system which helps companies fulfil their customer-oriented strategy. This is possible due to fully integrated information about customers, customer-related business-process automation, and available analysis tools to examine customer data, including marketing activity, sales and service activities.

SMART business was chosen as a partner because of the following reasons:

- SMART business is a leading Ukrainian company that provides services concerning choice, implementation, modification and support of ERP, CRM and BI systems as well as employee trainings to teach company’s employees working with these software products;
- SMART business is Microsoft Gold Partner and Microsoft Dynamics President’s Club member;
- SMART business company track record is more than 100 successful implementation projects in 22 countries, including projects in multinational companies.

Major tasks within the implementation project included: customer database management automation, its analysis and segmentation, analytical reports construction, automated banking system

Microsoft Dynamics CRM system has been long since known as a reliable tool for the banking system worldwide and as a certified product that fulfils effective customer relationship management. SMART business company, which is also a VeriPark's (world's number one developer of banking CRM) partner has once again proven its high qualification by quick and qualitative system implementation for Credit Agricole bank.

Kirill Rudnev, Sales Director of Smart business company

integration, and customer case management.

Benefits

Today, Microsoft Dynamics CRM implementation project is successfully finished. It included business-processes analysis and formalization, system functional requirements shaping, setting parameters for standard Dynamics CRM components and creating new ones, working-out additional integration modules and reports, data migration from preceding CRM system, and detailed multi-level testing.

Key users and system administrators were successfully trained to effectively use the system. The whole implementation process was thoroughly documented. Throughout the project, the Microsoft Dynamics Sure Step methodology was used, which allows providing the highest-level quality services to customers. The first stage of CRM-project covered work automation for more than fifty users who take part in customer relations management.

Credit Agricole bank management emphasizes the following advantages of Microsoft Dynamics CRM: first of all, the system covers the customer relations management main tasks range; secondly, a familiar user role-tailored interface reduces the employee training costs; and finally, low cumulative total cost of ownership and quick implementation result ensure high rate of return on investment.

Denys Shevchuk, Chief of CRM & Collaboration Department of SMART business company says: "As a result of productive cooperation, we have fulfilled a number of advantages for the customer, including business-process formalization, standard CRM components configuration and new ones creation. Excellence of the

joint project team and its synergy allowed analyzing, shaping and fulfilling the bank's tasks in customer relationships sphere in the shortest terms."

Igor Kuropiy, Commercial Director of the bank, emphasizes the importance of high-quality service obtained: "We are the bank which deals mostly with huge corporate customers. That is why the service quality is our number-one priority of our work."

Kirill Rudnev, Sales Director of SMART business company says: "Microsoft Dynamics CRM is known as a reliable tool for the banking industry worldwide and as a reliable product that fulfils effective customer relationship management. SMART business company, which is also a VeriPark's (world's number one developer of banking CRM) partner has once again proven its high qualification by quick and qualitative system implementation for Credit Agricole bank. "

For More Information

For more information about Microsoft products and services, call the Microsoft Sales Information Center at (800) 426-9400. In Canada, call the Microsoft Canada Information Centre at (877) 568-2495. Customers in the United States and Canada who are deaf or hard-of-hearing can reach Microsoft text telephone (TTY/TDD) services at (800) 892-5234. Outside the 50 United States and Canada, please contact your local Microsoft subsidiary. To access information using the World Wide Web, go to:

<http://www.microsoft.com>

For more information about SMART business products and services, call +38 (044) 585 3550 or visit the website at:

<http://www.smartbusiness.com.ua>

For more information about PJSC "CREDIT AGRICOLE BANK" products and services, call +38 (044) 490 14 04 or visit the website at: <http://www.credit-agricole.com.ua>

Microsoft Dynamics

Microsoft Dynamics is a line of integrated, adaptable business management solutions that enables you and your people to make business decisions with greater confidence. Microsoft Dynamics works like familiar Microsoft software such as Microsoft Office, which means less of a learning curve for your people, so they can get up and running quickly and focus on what's most important. And because it is from Microsoft, it easily works with the systems that your company already has implemented. By automating and streamlining financial, customer relationship, and supply chain processes, Microsoft Dynamics brings together people, processes, and technologies, increasing the productivity and effectiveness of your business, and helping you drive business success.

For more information about Microsoft Dynamics, go to:

<http://www.microsoft.com/dynamics>

Software and Services

- Microsoft Dynamics
 - Microsoft Dynamics CRM 2011
- Microsoft Office
 - Microsoft Office Outlook
- Microsoft Server Product Portfolio
 - Microsoft SQL Server 2008 R2

- Technologies
 - Microsoft .NET
 - Microsoft Office Technologies

Partners

- SMART business