



## Fujitsu @ Work: Wealth Management

**CHALLENGE:** Too much sales and sales management time was being spent on internal administration and not enough time on client activities. Also, sales people had difficulty understanding client holdings because of this situation, thus had trouble assessing their clients' value to the organization.

### SOLUTION:

Fujitsu consultants helped capture and define new business processes, then matched these against Salesforce.com functionality.

### BENEFIT:

The solution that Fujitsu provided addressed key challenges of the client's International relationship managers, investment managers, mortgage advisors, team leaders and senior management.

Fujitsu was engaged to completely review the end-to-end business processes of a bank's operations and identify key areas of concern. Once a client agreement was in place, Fujitsu went on to recommend a Salesforce.com implementation and proposed a 'day one' solution. Fujitsu consultants helped capture and define new business processes, then matched these against Salesforce.com functionality. Using our extensive integration skills we defined and implemented data integration that automatically updated client data on a weekly basis from the bank's core operational systems. Making innovative use of the Salesforce ETL tools, they provided real-time integration with a series of externally-held client information forms, saving approximately 45 minutes per client sale as well as increasing data accuracy. We provided:

- Lead Management
- Client Management
- Activity Management
- Campaign Management
- Opportunity Management
- Integration with Client's Data Warehouse
- Integration with an Existing Excel Client Profile Form
- Integration with an Automated Outbound Dialer Solution

Leveraging the Fujitsu SaaS delivery approach, we rapidly developed a prototype in close cooperation with the client's user community. Once agreed upon, this was implemented in the live environment. The project delivered a tightly integrated, highly tailored Salesforce.com solution that excited both users and management as they realized the potential to exceed their various objectives and targets using the new system.



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The solution that Fujitsu provided addressed key challenges of the client's International relationship managers, investment managers, mortgage advisors, team leaders and senior management. Specifically, it improved end-to-end business processes related to: lead management, sales management campaign delivery and measurement, and client holding information; so that they could efficiently:

- Capture and assign leads
- Increase the volume and quality of client interactions
- Increase the quality of interaction logging
- Identify and target prospective new clients
- View real time results using management reports and dashboards
- Obtain better understanding of client holdings and their potential value

The additional capabilities that were provided enabled each of the teams to easily focus on serving their clients, while enabling real-time management reporting of client activity and sales performance.

**Business Situation:** The client's wealth management division had a heavily spreadsheet-based means of managing new client leads, campaigns, opportunities and overall sales performance. After a successful implementation of Salesforce.com in the corporate client area of the bank, the client extended the application into the personal wealth management area.

**Industry:** Financial Services Segment: Wealth Management Client Profile

The client is a global organization helping clients to get the most from their wealth by acting as their guide. They provide services and expertise to make a difference whether clients want a close personal relationship or simply direct access to trading.

The company has more than 7,700 employees in 20 different countries. Together, they are working towards their mission of becoming the premier European wealth manager; attracting clients through world-class products, innovative solutions and outstanding service.

*We work with you to create solutions and produce results that drive your business.*

## **ABOUT FUJITSU AMERICA**

Fujitsu America, Inc. provides a complete portfolio of business technology services, computing platforms, and industry solutions. Fujitsu platform products are based on scalable, reliable and high-performance server, storage, software, point-of-sale, and mobile technologies. Fujitsu combines its renowned platform offerings with a full suite of onshore, nearshore and offshore system integration, outsourcing, and datacenter services covering applications, operations, infrastructure, customer service, and multi-vendor lifecycle services. Fujitsu provides industry-specific solutions for retail, manufacturing, healthcare, government, education, financial services, and telecommunications sectors.