

# CASE STUDY

## WEALTH MANAGEMENT

FUJITSU ENABLES GLOBAL BANK TO BETTER UNDERSTAND AND MAXIMISE THE VALUE OF ITS CLIENTS WITH A SALESFORCE.COM SAAS SOLUTION



### THE CUSTOMER

- A global bank offering wealth management services
- Provides services and expertise to meet client needs - whether they want a close personal relationship or direct access to trading
- Employs more than 7,700 employees in 20 different countries

### THE CHALLENGE

- Existing spreadsheet-based approach did not allow efficient management of leads generated by marketing
- Too much time being spent on administrative activities instead of client facing activities
- Difficult to manage business performance due to lack of pipeline and campaign effectiveness information

### THE SOLUTION

- Following a review of end-to-end business processes, Fujitsu recommended a Salesforce.com SaaS implementation
- Captured and defined new business processes, matching these to core functionality in Salesforce.com
- Ensured full data integration with bank's core systems

### BUSINESS BENEFITS

- **INCREASED EFFICIENCY** - improving end-to-end processes associated with capturing information, managing leads and campaign delivery
- **IMPROVED PRODUCTIVITY** - freeing staff of the administrative burden enabling them to focus on better serving their clients
- **BETTER CLIENT SERVICE** - enabled the bank to increase the volume and quality of client interactions
- **GREATER VISIBILITY** - providing real-time management reporting of client activity and sales performance

### CHALLENGE

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 decided to extend the application into the personal wealth management area.

The client's existing spreadsheet-based approach for lead management did not allow for the efficient management of leads generated from marketing campaigns. The lack of timely sales pipeline information and campaign effectiveness information meant that sales and marketing management weren't easily able to manage business performance. The current approach meant that too much sales and sales management time was being spent on internal facing administration activities instead of client facing activities. The existing solution also made it extremely hard for sales people to easily understand client holdings and therefore assess their clients' value to the organisation.

### SOLUTION

Fujitsu was engaged to deliver a complete review of the end-to-end business processes identifying key areas of concern. Following client agreement, Fujitsu then went on to identify recommendations for a Salesforce.com SaaS implementation and proposed a 'day one' solution.

Our 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 Salesforce.com ETL tools, we delivered 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 delivered:

- 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 co-operation with the client's user community. Once agreed upon, this was then implemented into the live environment. The project delivered a tightly integrated, highly tailored Salesforce.com solution that excited both users and management as they realised the

potential they would have to exceed their various objectives and targets using the new system.

**BUSINESS BENEFITS**

The solution Fujitsu delivered addressed the key challenges faced by 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 via management reports and dashboards
- Obtain better understanding of client holdings and their potential value

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

**FOR MORE INFORMATION**

Contact your SaaS consultant or visit:

<http://uk.fujitsu.com/saas>