

➔ The Customer

The customer is a financial services organization offering various products such as personal loans, auto loans, credit cards etc., to its retail customers.

➔ The Problem

The customer has a team of telemarketers that assist the direct sales team by generating leads and scheduling appointments. All of the scheduling data and activities were stored in Microsoft Excel.

Associated lead data such as conversations and details were sometimes inconsistent and telemarketers would often call the same lead multiple times. This would upset potential customers and led to lost sales opportunities. In addition, as there was no provision to capture the past history of the customer, the sales staff often sold additional products to customers that were already delinquent in payments. This lack of a client history also hindered the prospect in cross selling related products. Finally, the sales team was hindered from devising targeted strategies as they were not able to analyze customer data due to lack of a centralized repository.

➔ The Solutions

After reviewing the customer's challenges, PreludeSys proposed implementing Microsoft Dynamics CRM (Customer Relationship Manager) to create a centralized database for customer information. This improved reporting capabilities and maximized customer opportunities.

Microsoft Dynamics provided access to a customer's needs, orders, and inquiries

and could be recorded in seconds. The information could be retrieved and flagged for timely follow-up. This CRM system created a measurable improvement in the customer's sales process and enabled employees to capitalize on cross-selling opportunities. Now, employees have faster access to automated business information and have more time to develop customer relationships.