

## **Bidvest Bank selects Microsoft CRM for client services**

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Recently launched Bidvest Bank, a leading provider of specialised foreign exchange and banking services in southern Africa through its retail brand, Rennie's Foreign Exchange, has implemented Microsoft's Customer Relationship Management (CRM) system to improve services to clients. Microsoft Gold Certified partner, IS Partners was responsible for the implementation.

Bidvest Bank is unique in that its niche success includes foreign exchange, trade finance and related activities. The CRM solution encompasses contact management, sales force automation and basic case management components to address the bank's key objectives of improving customer retention and profitability as well as customer growth and efficiencies.

"Microsoft Dynamics CRM 3.0 has provided a central repository of client based information to be used by staff and executive management. Sales and marketing staff, for example, are primarily responsible for capturing client contact and related information into the CRM system," says Heath Turner, CRM director at IS Partners.

Bidvest Bank's product sales stages include client contact, application documentation, credit evaluation and facility documentation. The processes involved in the various sales stages have been automated for each product category, such as credit and non-credit, for example.

Basic case management has further ensured that any queries and service related issues can be captured against a client and assigned to the staff member responsible. Excel templates have also been provided for data take-on, and have been populated from the bank's source systems.

"All Bidvest Bank's transactional data resides in two core systems. These include the treasury, derivatives and capital markets system and the debtors and collections management system," explains Turner. "The CRM system is fully integrated to ensure that new or updated customer information, which resides in the CRM system, can be directly uploaded to the operational systems."

Gavin Bower, Director Treasury and Corporate Banking at Bidvest Bank says, "The Microsoft-based CRM solution offers ease-of-use, a good fit within our existing environment, a lower total cost of ownership as well as the ability to customise the application to our specialised requirements.

"IS Partners demonstrated to our satisfaction that Microsoft CRM would meet or business objectives and deliver value, while their methodology ensured a sizable project such as this could be more successfully implemented in smaller, manageable stages."

### **About IS Partners**

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Established in 2001, IS Partners addresses the need for quality implementations of Microsoft solutions. As a Microsoft Gold Certified Partner for Performance Management, Business Intelligence and Customer Relationship Management, IS Partners specialises in empowering sales, marketing, financial and management in its customer base. This includes various industries such as retail, distribution, finance and IT.

IS Partners uses its own proven, streamlined methodology for all implementations. It also specialises in bringing bottom line value to CRM and BI systems, providing business analysis, technical design, application architecture, implementation, training and performance tuning of CRM and BI implementations on the Microsoft platform and Microsoft's own CRM solution.