

# Closely Watched Treasury Clients

Microsoft Dynamics CRM 4.0 used by Raiffeisenbank, a.s.

## Introduction

Raiffeisenbank Ltd. belongs to a group of the largest and most prestigious banks in the Czech Republic. The organization offers a wide range of services for private and corporate clients and its dynamic development is reflected both in the broad growth of its activities and in the fact that it has gained a number of awards. For the third time in the last four years, Raiffeisen has won the "Most Dynamic Bank of the Year" title, the Czech competition, "Mastercard Bank of the Year" and its eKonto was declared the best bank account of the year. In 2009, Raiffeisen ranked first in the "Bank of the Year" category - the main category of the competition. In the "Golden Crown" competition, Raiffeisen has won first place in the "Direct Banking, Mortgage and Business Account" category.



## Initial situation

In the past, the Treasury sales team had to retrieve key information for doing business with clients from a variety of different bank information sources – ranging from MS Office Excel tables to Lotus client data and Treasury Master Agreement. The salespeople were concerned that the information was neither up to date nor secure,

and that the time required for retrieving it from the available sources took too long; clearly, accurate, up-to-date information is essential during telephone calls with clients. These concerns convinced the management that they needed to employ a unified application program for the management of current and potential Treasury clients, in which the salespeople would have direct access to all key information necessary in dealing with clients. The program would need to guarantee high-level security, quality and availability of client data, as well as reducing inefficient, time consuming manual copying of data from one application to another. The long-term objective was to introduce support in confirming Internet banking deals, and linking the client database with the telephone subsystem in the Treasury/Sales department.

## Solution

The development and implementation of this application was carried out by LLP Prague, who won the selection process on the basis of meeting all necessary criteria for the new application, proven experience in the area of implementing CRM systems; and by utilizing an advanced method of project management demanded by the bank's internal instructions. LLP developed the solution on the basis of a platform offered by Microsoft Dynamics CRM 4.0. The application displays information on TMA clients and potential clients to the salespeople in accordance with their user roles. The salespeople can view information on authorized client personnel and their concluded contracts. Rules and pre-set workflow processes guarantee that the information is complete; preventing any duplicity and data inconsistency.

MS Dynamics CRM implementation is a pilot bank project for deployment of IBM WebSphere Message Broker communication bus, applied by Trask. During the implementation, LLP had a unique opportunity to use this new integration bank layer to build an on-line interface between Microsoft Dynamics CRM and other bank systems,

which would enable the system to retrieve details of client account balances, credit limits and people authorized to conclude deals. This information is provided not only to the sales force when concluding deals, but is also transmitted for processing to other bank applications. An additional very useful enhancement for the sales team will be the prepared linking of Microsoft Dynamics CRM with the Treasury Department's telephone subsystem. From the Microsoft Dynamics CRM screen, it is very simple to initiate a telephone call to any number recorded in CRM. The calling client's key information is displayed on the salesperson's desktop the moment the telephone starts ringing.

*"It is incredible how Salem - that is our name for MS Dynamics CRM – has enabled us to shorten the time necessary for collecting complete and correct information on all Treasury clients. We have all the information in one place (all current account balances, all used and approved credit limits, all the client's authorized employees and all confirmation details) and thus, new possibilities for increasing productivity and growth dynamics throughout the bank have been opened. When this application went live, it showed us where we had reserves and which operation and data loss risks had threatened the bank. In 'Salem', the Treasury Sales Department acquired a powerful sales support tool which minimizes risk and maximizes the volume of concluded deals. The migration of data during project implementation showed that we had great problems with the purity and consistency of the data we had maintained on Treasury clients. Now, this is a thing of the past, and with 'Salem' we can rely 100% on client TMA. When entering the system, the data is not only thoroughly checked in many processes - including a check for duplicity - but it is also 'actual' because it is transmitted online from the other bank systems. Last but not least, I would like to thank LLP Prague - our supplier - for their excellent and professional approach to the implementation of the system, and for their management of the whole project - all agreed terms and planned budgets were kept."*

**Pavel Truchlý**

Treasury Product Manager  
Treasury and Brokerage Division  
Raiffeisenbank, a.s.

## Main Benefits

The most important benefits of Microsoft Dynamics CRM to the Treasury Department are:

- Significant time saving for salespeople, who can devote more time to sales and pre-sales activity with higher added value.
- Time saving for Back Office staff, who can devote their time to activities demanding more qualified activity than copying and subsequent data checking.
- Increased security of client data, which cannot be intentionally deleted or manipulated.
- The retrieval of actual, relatively complete information on a Treasury client during a treasury/sales business process is not dependent on multiple human interventions.
- Minimization of risk in terms of unintentional loss of data, leaking sensitive information or concluding deals with unauthorized people.

## About LLP CRM

LLP CRM provides consulting and implementation services in the area of customer relationship management. It specialises in Microsoft Dynamics 365 and Pivotal solutions.

We've implemented solutions for 100+ customers in 40+ countries worldwide. Our clients include: Carollinum, EUC Premium, Odlo, ORLEN Benzina, Raiffeisenbank, Scania, Skanska, Uniqa, and others.

LLP CRM is a member of LLP Group with access to over 30 years' international consulting experience.

[www.llpgroup.com](http://www.llpgroup.com)