



Asset Leverage Consultants (ALC)

Rapid access to a game-changing cloud based CRM solution for Jersey based Wealth Management firm

Summary:



Jersey based Wealth Management firm



Agile and rapid Microsoft Dynamics deployment



Guidance and support through development and adoption



Online, always available cloud-based CRM solution



Sector expertise for credit structuring and financial services

The Challenge:

CRM for customer engagement and regulatory compliance

ALC (Asset Leverage Consultants Ltd) is a Jersey based Wealth Management firm, advising clients with credit and debt structures. Richard Priddes, in charge of IT solutions and technology knew that ALC needed a leading CRM solution to support new and current clients effectively and to sustain growth.

Their existing low cost, online CRM application didn't provide clear and comprehensive visibility of deal tracking and relationship management with clients and lenders. The growing business needed a more sophisticated cloud-based CRM solution that could support Know-Your-Customer (KYC) for regulatory and compliance requirements.

Richard had previously implemented Salesforce.com and other CRM systems on a large scale. He was keen to use his experience to deploy CRM successfully in ALC's entrepreneurial environment, with a clear vision of the business transformation that a modern, cloud based CRM platform can provide when implemented well.

“Xpedition really “got” our business model and could explain exactly how Microsoft Dynamics would work for us.”

Richard Priddes, ALC

The Opportunity:

Business transformation, customer intelligence and extended reporting

Richard identified Microsoft Dynamics as a preference, because it would fit with existing software and infrastructure as well as provide a popular and intuitive user experience for CRM business best practice.

Other CRM specialists couldn't offer the depth of experience and knowledge to deploy a market-leading client relationship solution rapidly and effectively, that fitted ALC's specific requirements.

Xpedition ran discovery sessions in ALC's Jersey office to uncover their particular requirements.

“I was convinced of Xpeditions's expertise and credibility because they listened to our requirements, and demonstrated a clear understanding with a tailored demonstration to ALC's management team. Their pragmatic approach, proven experience, relevant case studies and demonstration gave me confidence to proceed.”

Richard Priddes, ALC

Secure cloud data in Wealth Management

Data security and data residency are key policy and legislative concerns for offshore firms, and hot topics when it comes to the cloud. Xpedition's sector expertise means we can help you to overcome these, and other considerations.



The Solution:

A cloud based, mobile and secure application for an agile business environment

ALC's Microsoft Dynamics deployment is cloud based, giving flexibility and security while keeping physical infrastructure needs to a minimum. Charlie Zerny says, *"Using our rapid deployment methodology, we delivered maximum business benefits fast within ALC's agile business environment."*

Adding the CRM test system to ALC's Microsoft Office 365 environment took a matter of minutes. Then, using Xpedition's CRM Deployment methodology, lead consultant and project manager Charlie Zerny worked with Richard from start to finish to configure and tailor the solution, migrate data, test and train users. The entire process took less than three months.

The solution is fully integrated with Office, including Outlook, with mobile and tablet access facilitating use by the highly mobile senior staff. Xpedition is providing ongoing technical and user support. Richard Priddes was very pleased with the efficient and trouble-free deployment. *"We've put it into immediate use and are already seeing the benefit of more sophisticated information, reporting and communication."*

The Future:

A self-service portal for the digital generation

ALC's visionary approach means the next phase of CRM is already in plan developing a self-service web portal that can be used by both clients and suppliers. It will provide differentiation and accelerate growth, harnessing the latest Microsoft web portal technology in Microsoft Dynamics. The portal will help meet and exceed the expectations of the new generation of wealth management clients, who like to access information and specialised services on demand.

"Success requires a partnership approach and smart progress tracking techniques. Using Office 365 we collaborated on ALC's requirements, issues and budget. Our consultants worked closely with ALC stakeholders, even using remote screen sharing tools, to bring the project in under budget and on time."

Ben Revill, Xpedition

About Xpedition

At Xpedition we guide your path to growth, through the implementation of intelligent cloud-based business applications. We help our clients to understand how technology can empower their business in real terms, and we deliver.

Previously known as TouchstoneCRM, we offer so much more than CRM and business software. We deliver real business value through expert consultancy. We're known for our questioning nature and for challenging the status quo.

We succeed when you succeed, inspiring clients with insight led guidance. Our market leading expertise and industry knowledge will help your business to reach its goals.

We understand your industry. Our experts are passionate about sharing their knowledge, revitalising client experiences, improving operational efficiency. At Xpedition, we'll show you the way.

Fast-track your journey to CRM success with Xpedition.

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