

CRM system for Erste Private Banking

How we helped the largest commercial bank to make its care of private clients more efficient



Thanks to the new Microsoft Dynamics CRM application, the Private banking of Erste Private Banking manages relationships with clients on a higher level. This innovation enables bankers to record comprehensive information on work with clients such as meeting minutes, overview of their activities or organization of events. On top of that, it brings a comprehensive view on the client and related care and can help Erste Private Banking to continually improve their mutual cooperation and relationships with its customers

Jakub Baláž

project manager
Erste Private Banking

Initial Situation

Before the implementation of the CRM system, the private banking of Erste Private Banking did not have any unified system for communication of employees or with clients. Important documents were distributed by various applications, systems or via emails. Individual communication tools were not interconnected what restricted the speed of information transmission. Client data were recorded in Excel files, what made the work processes even slower. Since business activities were not managed uniformly, Erste Private Banking management decided to implement a new solution, which could help to improve existing situation.

Project Objectives

With the aim to increase speed and quality of customer care in the area of private banking, we have implemented a modern CRM system to our customer. **The main objectives of the projects were:**

- implementation of a centralized system with all client data in one place;
- increased productivity of private bankers providing customer care;
- synchronization of business communication;
- high-quality customer services;
- easy management of business activities;
- access to important data anytime and from any electronic device;
- data security.

Customers' profile

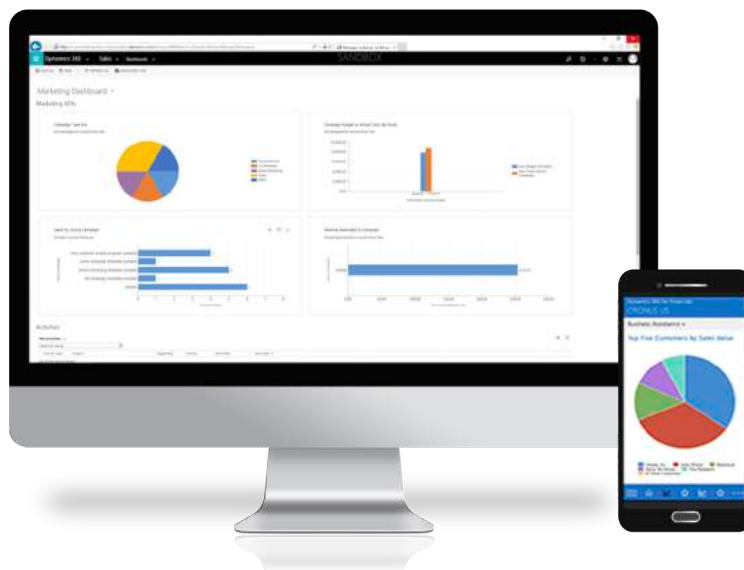


Erste Private Banking service in Slovakia is provided by Slovenská sporiteľňa, the largest universal commercial bank in Slovakia. Erste Private Banking is a foremost manager of assets in Central and Eastern Europe and the largest of its kind in Austria. It focuses on private clients, provides international private banking, investment management and brokerage services. Erste Private Banking services are used by the clients interested in long-term evaluation of their finances with the volume of assets intended for investment of at least 200 000 eur.

Erste Group has been awarded “The best private bank in Central and Eastern Europe” by professional magazines The Banker and PWM four years in a row. The winner was chosen by a jury consisting of 15 professionals from the area of private banking and asset management.

Solution Description

The CRM solution for the private banking area is based on the **Microsoft Dynamics CRM** platform integrated with other bank systems in the background. The solution is interconnected with **Microsoft Outlook** and provides synchronization of business communication, tasks and client cards with the CRM system. Thanks to the **360-degree view** of a client, the private bankers have a better insight into all business activities. Solution mobility enables to react on client needs anytime and from any electronic device. The solution was implemented by the agile methodology. The CRM system is used not only by private bankers but also sales support and back-office team.



We have provided our customer with the significant benefits

1. The solution providing the 360-degree view of client data.
2. The system available anytime and from any electronic device.
3. Client card containing all important information about clients, their investment history or current status on the investment market.
4. Optimization of customer-related processes in the area of private banking.
5. Access to data not only via the CRM solution, but thanks to the integration with Microsoft Outlook also directly from email communication.
6. Notifications concerning planned meetings with clients or ongoing activities.
7. Integration with other internal bank systems and storage of client data.
8. Recording of meeting minutes and planning of other activities.
9. Possibility to use various marketing functionalities.

Technologies Used



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obchod@millennium.sk

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Millennium, spol. s r. o.
Plynárenská 7/C
821 09 Bratislava

www.millennium.sk

+421 2 59 100 300
mail@millennium.sk