



### Introduction

Our client is a leading international and **retail asset management** specialist, with a large **international** presence, ranking as one of the top five UK retail investment institutions. Our client had a requirement to implement an in-house system providing a fully automated **Customer Relationship Management** tool allowing a single point of data entry for all client information. The system, CIB, provided a centralised data repository ranging from basic names, addresses and telephone numbers to highly detailed information such as portfolios held, valuation information, contact details and client events. A further feature of the system was the facility to generate detailed reports together with the ability to filter and sort data according to specific requirements.

### The Challenge

As CIB was vital to the way our client conducts its business it was imperative that all employees, both existing and new, were fully conversant with using the system and ensuring all data entered was of the highest integrity.

Initially the system had been installed on users desktops with no formal training provided as it was Windows based software and users understood their business. The result of this approach was the unmitigated failure of the system where, at one point, senior management were asking for the system to be removed.

Contrast Training was asked to evaluate the business processes and suggest a methodology and training solution by which the project could be saved. Our innovative approach to match roles to a training programme thus ensuring the courses were tailored to meet individual and business needs allowed Contrast Training to turn a project disaster into a major success. Implementing the CIB system was particularly complex as many other back-end accounting legacy systems were integrated into the system.



### The Solution

A variety of CIB courses were developed in line with job role profiles and full supporting training documentation was developed to train both existing employees and new joiners on the features of CIB encompassing the following features:

#### Client Information

Central and secure storage of contact details (names, addresses, telephone numbers, etc.) and other client information (fee basis, restrictions, objectives, etc.). Both existing and prospective clients could be recorded within CIB.

#### Reporting Requirements

Information could be printed from CIB to create reports, or could be extracted to be used in other applications (e.g. in Word or Excel spreadsheets).

#### 'Event' Recording

The facility to store brief notes of events such as telephone conversations, meetings, functions etc. Dates, contact names, event types and documents were stored against each note and a full history of events was maintained.

#### Extracting Information

Client information could be analysed according to specific criteria, based on most of the recorded data items.

Contrast Training worked hand-in-hand with the customer to tailor the training solution, be part of the UAT team and meet with the business to discuss their individual requirements. This ensured that focused training encompassing business procedures and policies were mapped to the training sessions.

### The Result

CIB training is an **on-going solution** within our client's organisation, for both existing employees who move on to new roles, and new employees as they join the organisation.

CIB is an ever **evolving system** and new versions are rolled out to the organisation on an ad-hoc basis. Therefore, **training updates** must be **delivered** to the organisation to keep all employees abreast of any changes and updates. This has meant that Contrast Training has had to **work closely with the developers and business analysts** and has been key in testing upgrades and developing the system to its current potential.

It must be stressed that the software did not change before or during the time that Contrast Training were involved. The only thing that did change was the matching of the business requirement with the needs of the individual user.

The result was **a CRM system that is effective and crucial** to our client's business.