



Bank of London and The Middle East plc expands the use of Dynamics CRM.

Bank of London and The Middle East plc is the largest Islamic bank in Europe and is an independent UK, wholesale Shariah compliant bank based in London. It is led by a management team that brings together a combination of experienced international bankers and leading experts in Islamic finance.

The Business Challenge

BLME did not have a single system that supported its front office customer engagement, correspondence and document management. They wanted to explore ways of using Microsoft Dynamics CRM in conjunction with Microsoft SharePoint to support areas of the bank to achieve the following aims:

- > Build a front office customer record with simplified document management
- > Improve customer service
- > Improve the capture and maintenance of customer information
- > Standardise and automate processes according to industry best-practice

The Solution

The solution is a combination of Microsoft Dynamics CRM and Microsoft SharePoint - using each platform to work in a smarter way around client information management. In CRM, the system is used primarily for Contact, Account and Opportunity management, supported by a complete interaction history for each client.

In particular, enhancements were made to the native ability of Microsoft Dynamics CRM to store client related emails and link them to SharePoint. Specifically, Advanced ConsultCRM (Advanced) created an intelligent email attachment extraction capability. This enables CRM to push attached documents into SharePoint with useful metadata such as the deal it relates to. SharePoint then picks up this document and metadata to logically store the documents and make them available for other areas of the bank, such as compliance and back office processing. The solution has significantly improved the efficiency with which the customer documents are handled, stored and can be located in the future.

Nigel Stevens, Head of Business Solutions, BLME comments: "Before engaging with Advanced, BLME had worked with a different Microsoft Dynamics CRM partner to customise the system to support one particular part of the bank. While the customisations suited areas of the bank in scope, they were not able to support other areas. BLME decided to re-launch Microsoft Dynamics CRM, with Advanced's help, one business area at a time."

Client >

BLME

Sector >

Business Services

Project >

Microsoft Dynamics CRM, Microsoft SharePoint

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Nigel Stevens >
Head of Business Solutions >
BLME

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In order to avoid the shortcomings of the original implementation, a project team was formed to bring together subject matter expertise across banking, Microsoft Dynamics CRM, Microsoft SharePoint and other business systems. The project team worked together to ensure that no single requirement or business area would dominate the project, or prevent the system from working in another area.

When so many different stakeholders are involved, it is critical that this kind of high-level solution architecture is considered at the beginning and re-validated throughout the project lifecycle.

Nigel Stevens adds: *"Each phase of the project had its own discovery, design, development, training, testing and implementation stages, making it possible for areas of the bank to start using components of the solution ahead of the launch of the complete product. This enabled us to see benefits and return on investment early on. This in turn helped improve stakeholder buy-in for future stages because they could see the benefits of previous stages in action."*

Results and Benefits:

The solution was rolled out to several business areas of the bank, with plans for an organisation-wide roll out, but already the bank is seeing benefits in the deployed business areas. These include:

- > Reduced administration overhead because routine processes are automated and follow a defined structure
- > Improved customer experience due to the ease with which the client information and related documentation can now be located and maintained
- > Reduction in duplicated document storage
- > Improved visibility of client records and documentation across departments

Nigel Stevens concludes: *"The main benefit we see is the flexibility and extensibility the solution offers - it will continue to support the bank for years to come. We knew we'd made the right technology choice in Microsoft Dynamics CRM, and Advanced ConsultCRM has proven to be a very professional firm; their insights, suggestions and ongoing support have been excellent."*

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