



**CUSTOM
HOUSE**

Company

Custom House Ltd.

Industry

Financial Services

Number of Employees

600+

Corporate Headquarters

Victoria, BC

Website

www.customhouse.com

Overview

Custom House Ltd. is a global payments company that offers extensive foreign exchange solutions using market-leading technology and a worldwide network of trading offices.

Challenge

Custom House's Online Services department was using multiple manual systems to manage customer enrollment information, compliance requirements and ongoing customer relationship management. They required a solution that would automate their CRM processes and data management.

Solution

Ideaca worked with Custom House to implement Microsoft Dynamics CRM, effectively replacing numerous manual methods and processes in favour of a more automated, collaborative customer management and support solution. The Dynamics CRM solution is integrated not only with Microsoft Outlook, but also Custom House's Microsoft Office SharePoint Server (MOSS) 2007 solution for compliance and customer account-related document storage and management. Furthermore, Custom House's CRM solution is integrated with their customer account creation and signup application, allowing prospective Online Services customers to sign up for an account online and for Custom House personnel to immediately begin converting them from prospects to customers using CRM.

Benefits

With the implementation of Dynamics CRM integrated with SharePoint and the online sign-up and account creation application, Custom House has realized the following benefits:

- Ability for management to determine customer enrolment cycle times and customer conversion rates at set time intervals with single click of a button
- Increased customer service efficiency as representatives can now work within a single location to manage incoming support requests
- On demand tracking of customer and prospect history and activity
- Extensive customer profiling, including the ability to track customer preferences such as trade limits, and trade frequency
- Streamlined signup and enrolment process in Dynamics CRM which allows members of the Custom House team to readily track which stage a prospect is in towards becoming a customer
- Automated customer account deactivation, application cancellation, and prospect conversion including the ability to analyze reasons for customer loss or prospect cancellation
- Enhanced SharePoint integration which automatically links uploaded documents to essential information allowing Custom House personnel to reference documentation specific to the customer record.