



DreamTeam Portal 2.0 case study

A CRM on steroids



Jupiter Unit Trust Managers Limited and Jupiter Asset Management Limited are wholly owned subsidiaries of Jupiter International Group PLC, itself a subsidiary of Commerzbank, one of Germany's leading banks.

Over the past two years, Jupiter's IT Department has partnered with ICS to develop and implement a number of SharePoint systems including a recent full integration with CRM. According to David Hodkin – Jupiter's Development Manager – the decision to rationalise the client correspondence required substantial in-house development and expertise.

James Taylor – Jupiter's Project Manager – explained. "We found that 3rd party applications could become an expensive option, especially in terms of customisation and development. We have our own in-house development team, and decided to opt for a solution that we could support and enhance ourselves in line with the changing demands of our organisation."



Historically, Jupiter Built and developed solutions in-house and although this approach has served the company well, David Hodkin realised that rationalisation, management and administration of the client correspondence would require substantial development and expertise.

"We can call on ICS whenever we need them. Their knowledge of Microsoft products has been invaluable."

James Taylor
Project Manager, Jupiter Group

Microsoft's own endorsement of ICS Solutions resulted in a partnership between ICS and Jupiter. The first project was the development of the SharePoint client correspondence administration and management system. With hundreds of clients and tens of thousands of items of correspondence, a system was needed that would act as a central, indexed repository, enabling any document to be quickly identified and retrieved.

The success of the SharePoint solution led to a further and more complex project – the implementation of a CRM system, integrated with the successful SharePoint document management system. Not only was the solution to automatically create SharePoint cabinets 'on the fly' for the storage and retrieval of all documents relating to each contact, it would also link to the corresponding account in the back office financial system once a potential client had transitioned from prospect to client.

ICS Solutions worked closely with Jupiter to develop the required solution. According to James Taylor, implementation timescales were shorter than was initially anticipated.

"We now have a comprehensive and integrated CRM with extremely advanced content management capabilities," said James. "Through sound analysis, design and planning, Jupiter and ICS were able to mitigate most of the risk associated with the integration work ensuring that the original project objectives could be exceeded."

BENEFITS

- Access to a fully certified and trained team of Microsoft specialists.
- Ability to meet new demands.
- Flexible resourcing model.
- Trusted external delivery capabilities in new technology areas.
- Reduced reliance upon traditional contract markets.
- Access to specialist, less frequently used disciplines.
- Close relationship with harmonised working practices.
- Foundation technologies enhanced and customised to meet exact requirements.
- Indexed repository of client correspondence.
- Rapid access to any document relating to any client.
- Document management solution tightly integrated with CRM.
- Comprehensive and powerful client management solution with access to all documents.
- Integration with back office accounting system.