

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."

Getting the most from SharePoint

"We had already decided to base our new solution around SharePoint," said David Hodkin. "If we were going to get the most out of SharePoint, we needed to bring in outside expertise."

James Taylor agreed. "We needed expert consultancy to help us automate our Private Client



correspondence system which, at that stage, was made up of both paper-based and electronic files."

David Hodkin attended a Microsoft workshop where ICS demonstrated a SharePoint-based solution that appeared to meet some of Jupiter's requirements. "I had already heard of ICS and their capabilities, and feedback from peer groups had been extremely positive," he added. "This, combined with Microsoft's own endorsement of ICS encouraged us to invite ICS to discuss our immediate and longer term objectives."

The first major project undertaken by Jupiter and ICS 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

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

James Taylor
Project Manager, Jupiter Group

repository, enabling any document to be quickly identified and retrieved.

"We urgently needed to implement a system that would index and store correspondence created under Microsoft Office centrally against client accounts and not on individual file shares," said David Hodkin. "In addition, we needed to scan our older, paper-based documentation and upload these to the system. This solution not only had to provide easy and rapid retrieval of any document for any client, but also was to be linked to our back-office accounting systems."

A successful project

The success of the SharePoint solution, jointly developed by ICS and Jupiter's IT Department, encouraged the team to look at a further, and more complex project – the implementation of a CRM system to be integrated with SharePoint.

The vision was for a CRM tightly 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 held in the CRM, it would also link to the corresponding account in the back office financial system once a potential client had transitioned from prospect to client.

A CRM on steroids

"In its vanilla form, CRM 3 was not far reaching enough for our needs," continued James Taylor. "But we use foundation technologies and were completely confident that in ICS we had a partner that would help us develop and integrate bespoke technologies to give us a CRM on steroids."

ICS and Jupiter's IT Department worked closely together to develop the required solution,

undertaking the integration of SharePoint with CRM3. According to James, implementation timescales were shorter than 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, ensuring that the objectives could be exceeded."

ICS and Jupiter continue to work in partnership. A number of other projects have been completed, including the development of a RFP tool.

"ICS is our partner," concluded David Hodkin. "We have already demonstrated the integrated SharePoint and CRM solution to other Jupiter business units, and this has given rise to a demand for other similar deliverables. Our relationship with ICS has been extremely successful and we plan to remain in partnership with them for the future."

BENEFITS

- 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.