

Case Study – Global Sales Process and CRM Platform roll-out

Context

- A global Tier 1 bank embarked upon a digital transformation programme to materially improve the efficiency of the Relationship Management and Product Management teams in supporting and managing clients with their business needs.
- Vox were selected to lead the programme and provide key resources

Issue

- The client wished to deploy Dynamics 365, one of the leading CRM platforms, as a cloud based SaaS platform to replace an outdated and difficult to change incumbent solution.
- As part of the change, the bank was looking to homogenise and optimise sales processes across departments, regions and products for the Corporate Banking area.

Approach

- We supported the client with provision of Programme Management and Test leadership resources to structure the programme, lead and coordinate planning across all departments, report into multiple CXO level committees with updates and progress, structure an approach to adoption of cloud including understanding security, regulatory and data complexities and challenges.
- We additionally provided input and guidance on the technology build, test and migration and orchestrated the global deployment approach and roll out.

Results

- During our involvement, the full system was built, implemented and deployed across 6 of the larger regions covering 40-50% of the target 14,000 seats, overcoming the largest hurdles as regards system build and deployment, data migration process, business process change, user training and security/regulatory governance.
- The business and platform change has subsequently been deployed to > 50 regions and approx. 12,000 staff following the process defined for the initial deployments.