

WEALTH MANAGEMENT CASE STUDY FELDSPARTECH

Customer

Financial Services Company

Our customer is a Wealth Management company with an AUM of just under \$50 million. It requires a high-touch approach and timely communication with customers.

Challenges

Existing CRM clumsy | Duplicate Data Entry Flows | Difficult to follow-up with customers

Existing CRM too clumsy to keep pace with customer's expectations. Making changes to the flow or adding new functionalities would take months together.

The vendor was not flexible enough to accommodate change requests. Even when changes were made, other functionalities broke, impacting the business.

Besides, there are very few CRM products purpose-built for the Wealth Management domain. The product did not capture the complete lifecycle of the customer at one place.

Data capture flow was broken and often required duplicate entries.

Data entry process was overwhelming for the sales team and hence discouraged them from using the system.

Highlights

Effort Saved	90%
--------------	-----

1 person month vs 10 person months

Costs Saved	80%
-------------	-----

Annual Savings	67%
----------------	-----

System Down Time	Less than 1%
---------------------	--------------

Turnaround time for a new Change	1 working day
----------------------------------------	---------------

Business Impact	20% increase in Lead Conversion
--------------------	------------------------------------

30 % Reduction in Client Turnover

sales@feldspartech.com

www.feldspartech.com/atman

Requirements

Simple System | Flexible to Changes | Easy to Maintain

Our Customer wanted a system:

- Simple to operate, easy to understand and flexible for changes.
- To be built within a few months and at a reasonable cost.
- That was easy to maintain and did not require expensive tech experts.
- That guided account reps to follow-up with customers regularly.

Solution

Agile | Fast | Cost-effective

- Customer shared requirements.
- FeldsparTech quickly developed a working application using Atman.
- There were multiple demos for feedback until the application was good to go!
- The application was ready within 2 weeks of customer engaging with us.
- This was possible due to the prebuilt components and services in Atman.

A custom CRM in 2 weeks at a cost that is one tenth of what a traditional application provider quoted!

The application is accessible on web as well as on mobile phones and tablets. Change need to be made only at one place and not to different application versions.

Our customer continues to be happy!



Email



Telephone



LinkedIn URL



Twitter handle

www.feldspartech.com/blogs

Benefits

- Superfast "Go-To-Market"
- Application development cost savings: 80%
- No additional hires for maintenance of the new system
- Reduced system downtime
- Reduced customer turnover
- More time to focus on core business than worrying about technology

www.feldspartech.com/about

