

# Microsoft Dynamics™ CRM4.0 White Paper

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Finance Company Implements Microsoft Dynamics  
CRM Solution to Improve Business Processes and  
Productivity

**“Microsoft Dynamics™ CRM 4.0 provides fast, flexible and familiar business software that helps Almondz to improve customer service efficiency and effectiveness.”**

#### Overview

Country or region: India  
Industry: Finance Company

#### Customer Profile

- Incorporated in 1994.
- SEBI registered merchant bankers.
- Investment Banking, Corporate Finance and Distribution.
- Trading & clearing member for equities with National Stock Exchange (NSE) & Bombay Stock Exchange (BSE).
- Trading & clearing member for both Cash & Derivative Segment.
- Depository participant with Central Depository Services Ltd. (CDSL).

#### Business Situation

Keeping in mind the growing business, the company wanted to provide adequate customer services and reporting capabilities. It wanted a powerful, affordable, and scalable customer relationship management (CRM) solution.

#### Benefits

- Improved MIS Reports
- Improved Customer Service
- Reduced User Dependency
- Manage Work More Efficiently
- Flexible and Customizable Solution
- Improved Business Management
- Route and Queue Cases

#### INTRODUCTION

Almondz Global Securities Limited (AGSL) is one of the leading Investment Banks. Its main business lines are: Corporate Finance, Distribution of Financial Products, Private Clients, Portfolio Management Services, and Equity Broking.

AGSL's client base in the Corporate Finance segment covers all leading Public Sector Undertakings (PSUs), large corporate and the vast and increasingly important segment of SMEs. In the Debt markets, the company has relationships with over 4000 leading Provident Funds. In the Distribution of Third-party financial products, AGSL has built a large base of retail customers as well as country-wide network of 1500 franchisees. In Equity Broking, AGSL is serving both the Retail and the Institutional Investors. The Company has also set up a Private Clients business to advise and manage High Net Worth clients.

#### SITUATION

With the growing business requirements, Almondz needs to automate contact/account management system. Almondz was maintaining contact/ account details using their LD system. They need a system which can synchronize the data daily with scheduler. To enhance the market presence, Almondz needs relevant system that delivers high quality contact/account management, customer service, data security and MIS reports.

#### SOLUTION

Almondz chooses to deploy Microsoft Dynamics™ CRM partnering with Religare Technologies because it best met their requirements. Factors that convinced Almondz to build the solution on Microsoft Dynamics™ CRM platform include:

- Sophisticated set of building blocks for customer services.
- Role-based security across business entities.
- Highly customizable platform.

The company finds that the Microsoft Dynamics™ CRM provides a perfect framework on which it could build such a comprehensive and customized CRM solution, because Microsoft Dynamics™ CRM is built on a sophisticated line-of-business application platform; it provides the basic required services upon which developers can build custom solutions, tailored to specific business needs. <sup>TM</sup>

In the investment company, security is especially vital and Microsoft Dynamics CRM provides the company a great foundation for a comprehensive security infrastructure. The CRM solution provides basic insights into following modules:

- Account & Contact Management
- Service & Case Management
- Reporting automation

**"Microsoft® Dynamics™ CRM 4.0, an enterprise class CRM solution, which is used all across the globe by various customers for automating business processes, met our biggest requirement of organizing, storing, and accessing customer data effectively."**

**Mr. Vinay Anand, Vice President | Head – Business Process | Retail Enuity Broking, Almondz Global Securities Limited.**

### About Religare Technologies

Religare Technologies is the IT Services business of the Promoter group. The Religare Technologies umbrella includes Religare Technova IT Services Limited, which provides Enterprise IT Solutions and Religare Technova Business Intellect Ltd, which provides Knowledge Management Solutions.

Currently with over 2000 employees and presence in over 10 countries, Religare Technologies is poised to be a leader in the global IT space. The group entities have partnered with IT majors, Independent Software Vendors (ISVs) and Internet companies to provide a broad spectrum of IT services, products and solutions to their customers. Religare Technologies focuses on clients in key verticals such as Banking and Financial Services, Insurance, Capital Markets, and Health Sciences.

For more information write to:  
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www.religaretech.com

For more information about Microsoft products and services, go to: [www.microsoft.com](http://www.microsoft.com)

"Microsoft Dynamics™ CRM helps Almondz to respond faster on customer queries. It addresses and deliver consistent and efficient customer care support that contributes to long-term business profitability.

### CTI (Computer Telephone Integration)

CTI helps the Almondz Global Securities Limited to manage the attended and unattended calls. Unattended logged calls are distributed by **Round-Robin technique** to call agents based on their availability and time of login.

### BENEFITS

Microsoft Dynamics™ CRM provides a robust solution along with features, flexibility and customer details to optimize the effectiveness of Investment Banks.

**Improved MIS Reports:** Microsoft Dynamics™ CRM facilitates Almondz to track and generate MIS Reports faster and this in turn reduces the Turn Around Time.

**Improved Customer Service:** Microsoft Dynamics™ CRM helps Almondz to answer customer queries faster and more accurately.

**Reduced User Dependency:** Microsoft Dynamics™ CRM helps in efficient consolidation of data and this reduces user dependency.

**Manage Work More Efficiently:** Microsoft Dynamics™ CRM creates a productive work environment for customer service representatives.

**Flexible and Customizable Solution:** The flexibility of Microsoft Dynamics™ CRM empowers Almondz to build a sophisticated solution that reaches beyond the realm of customer relationship management. The solution can be easily adapted to meet specific requirements of Almondz.

**Improved Business Management:** Many expanded capabilities in Microsoft Dynamics™ CRM, such as end-to-end relationships and improved workflow, have helped the company to streamline business operations and provide an integrated view.

**Route and Queue Cases:** Microsoft Dynamics™ CRM dispatch cases to queues where individuals and teams can access them easily and automatically route them to the appropriate individual, supervisor or expert.