

Vulcan Solutions implements Microsoft CRM for HC Financial Services

HC Financial Services determined that it needed to invest in an industry-leading business system to facilitate business growth, and to ensure continued high levels of service for their clients. They selected Vulcan Solutions to provide an integrated sales and administration system that “best fit” their requirements.

Vulcan Solutions Case Study



“We selected Vulcan Solutions based on their unrivalled experience of system implementation in the financial services sector. What has further strengthened our faith in Vulcan has been the quality of their people and the very real sense of trust that has developed. In a word they have exceeded our expectations.”

Hannah Kiely
CEO, HC Financial Services

The System Requirements for HC

HC Financial Services required a software system that would be pivotal in the management of their administration requirements for the purpose of Customer Relationship Management (CRM). The functional requirements included:

- > A comprehensive single view of each customer, to include “fact find” information, an overview of their policy and product information, and a detailed history of correspondence and contact
- > A range of tools to automate sales and marketing activities
- > Excellent database query and reporting facilities to facilitate the analysis of sales performance and to identify potential sales opportunities
- > Mail merge facilities that would automatically merge customer data into customer correspondence
- > A framework within which all compliance requirements could be managed on an ongoing basis.

It was also critical that any new system would streamline existing processes and procedures while accommodating the evolution and growth of HC’s business.

The System Solution for HC

After reviewing the vendors and products available in the market-place, HC Financial Services selected **Vulcan Solutions** to provide a system that “best fit” their requirements.

About HC Financial Services

HC Financial Services was established in 1988 and today is the leading independent financial services company in the west of Ireland. The company is based in Galway, has a staff of 30 plus professionals and has been a recipient of an ISO Quality Award. HC provides tailored solutions to both private and corporate clients on all financial needs.

Products and Services

- > Pensions
- > Protection
- > Investments
- > Mortgages
- > Taxation

*Software Systems for
Brokers and Intermediaries*



“The Microsoft CRM system has transformed the administration of our company and has positioned us for further growth. One cannot emphasise how important it is to have all of your customer information available in a single view on a centralised system.”

Hannah Kiely
CEO, HC Financial Services

The Implementation for HC

Vulcan Solutions provided a customised solution on the Microsoft Dynamics CRM platform. All system requirements were met by the agreed deadlines, and the project was successfully implemented without invasive business interruption at HC.

Vulcan Solutions took complete ownership of the implementation project for HC, and provided a range of services that included:

- > *Project Management*
- > *System Customisation*
- > *Data Cleansing*
- > *Data Migration from Access and Excel databases*
- > *User Training for 30 users at HC*
- > *System Support*

The Microsoft CRM system stores all HC’s business data, including all “fact find” information, all contact information, and all administration information relating to each customer’s policies and portfolio. The system provides a range of features for contact management, marketing campaign management, and sales force automation.

The Results for HC

Microsoft CRM has had a very positive impact with regard to streamlining all business processes at HC. The excellent integration with Microsoft Outlook, Word and Excel has brought a significant reduction in the administration workload at the company. The strongest endorsement has come from the users, who have found that Microsoft CRM is extremely user-friendly.



www.vulcan.ie

Vulcan House,
Parkmore East Business Park,
Galway, Ireland

Tel: +353 91 781781
Fax: +353 91 781788

sales@vulcan.ie



Pictured at the launch of HC’s Microsoft CRM system are (left to right), Pat Gilmore, CRM Specialist at Vulcan Solutions; Hannah Kiely, CEO at HC Financial Services; Cian McNamara, General Manager at Vulcan Solutions; Marc Mellotte, Technology Manager at Vulcan Solutions.



Vulcan Solutions develops advanced software systems for brokers, intermediaries and product providers in the consumer financial services sector. Vulcan Solutions is a Microsoft Gold Partner.

Copyright Direct Marketing Technologies 2007. Vulcan Solutions is a business name of Direct Marketing Technologies Ltd. Microsoft is a registered trademark of Microsoft corporation in the United States and other countries.