



CASE STUDY

How a global bank improved the experience of both customers and staff globally using Microsoft Dynamics 365

How a global bank improved the experience of both customers and staff globally using Microsoft Dynamics 365

Inciper is working with one of the largest banking and financial services institutions in the world, serving millions of customers on a daily basis.

Driving digitalisation in such a complex environment is not an easy task, but it's essential if the bank is to remain the preferred international financial partner for its clients.

The global banking group wanted to improve the information that was available to the more than 8000 members of it's frontline teams and improve the relationship management and sales processes.

Microsoft Dynamics 365 Sales was implemented with support from Inciper to help achieve this goal.



The Challenge

The key challenges for business banking relationship managers were poorly defined and inconsistent processes and hard to access data.

From a data perspective, multiple line of business systems meant that obtaining a central view of the customer and a clear set of recommended actions and products was time-consuming and difficult.

From a process perspective, relationship managers found adherence to both global and local process requirements onerous and overly manual, with leadership identifying a lack of consistency or common process in many areas.

Key Benefits

- **Single View of Customers** – Microsoft Dynamics became the main point of references for relationship managers by surfacing pertinent information from line of business systems, saving users time and increasing the accuracy and consistency of data
- **Common Sales Process** – With many teams working with local compliance rules and regulations, it is impossible to define a single standard process globally at the micro level. However, by agreeing high level stages and terminology, Dynamics was able to support a more consistent global footprint, while also being flexible enough to embed and enforce the local differences
- **Embedded Security** – With highly sensitive deals and customer information being used, it was essential that the solution was able to adapt and scale to complex global security needs. By doing this seamlessly, users and compliance teams saved time and reduced risk.
- **Personal and Management Reporting** – The Dynamics solution integrated into existing reporting and dashboards, acting as a source of data to help monitor and improve process and sales. In addition, dashboards were configured within Dynamics for operational use including management of pipeline, approvals and escalations.

The Approach

A combined Microsoft and Management Consultancy team worked with Inciper's Solution Delivery team to design and deliver the overall solution.

Business analysts gathered the requirements, Inciper oversaw the functional and technical design of Dynamics 365 with QA and review by Microsoft to ensure adherence to best practices and help anticipate Microsoft Product changes and improvements coming.

To reduce risk and embed feedback, the rollout started with 2 countries and then saw a phased deployment to a further 50+ markets.

Microsoft Solution Components



What Next

The bank's policies for continuous improvement and ongoing management of the solution mean that the solution continues to grow and evolve to support the business. Key areas include:

- **Power Apps** – Ongoing deployment of additional use cases, from approval processes to capture of meeting actions and feedback
- **New Dynamics 365 Functionality** – The Dynamics platform is constantly evolving, and HSBC is reviewing new capabilities as they arrive to ensure that they are maximising investment in the platform



Why Inciper?

Delivering business value through technology implementation is what drives us.

We help organisations, large and small, make the most from Microsoft technology and have a proven track record delivering results rapidly and efficiently.

To learn more about Microsoft Dynamics 365 and the Microsoft Power Platform, the Inciper RAPID delivery methodology or our other clients visit please visit our website at www.inciper.com or email us at info@inciper.com

Inciper

Inciper