

<b>Client:</b>	<b>Coronation Fund Managers</b>
<b>Business Partner:</b>	<b>iSquared</b>
<b>Product/Software:</b>	<b>SalesLogix</b>
<b>Operating System:</b>	<b>Windows Server 2003</b>
<b>Database:</b>	<b>SQL 2000</b>
<b>Number of users:</b>	<b>80</b>
<b>Country:</b>	<b>South Africa</b>
<b>Date:</b>	<b>2008</b>

### ***Client profile***

Coronation Fund Managers is one of the largest asset management companies in the country, managing funds in excess of R130-billion.

### ***The challenge***

At Coronation, the aim was to deliver a world-class reporting system through establishing a central database across its retail and institutional contacts. Specifically, Coronation's current system did not allow users to email directly from the application or for the storing of an email against a contact in a central database.

Neal de Graaf, Head of Information Services, Coronation Fund Managers, explains that with managing funds in excess of R130-billion, Coronation needed a central database to store critical client information, like static data, communication, interactions, relationships and issue tracking. Further to this, the company needed a link between portfolios it managed on behalf of retirement funds, corporates and individuals, as well as the contacts attached to these. The standard functionality of SalesLogix, did not cater for this need, however a more bespoke and surprisingly lower cost development option really excited us which uses the SalesLogix development environment," de Graaf says. "This was something that was clearly lacking in other CRM systems reviewed, and the cost to customise other products for this need came at a big price".

### ***The solution***

James Beaumont, CEO, iSquared, says that by following a clear and focused objective from Coronation, iSquared was able to deliver a very cost effective, turn-key solution due to its ability to fulfil the functions of project management, business analysis, software development, system engineering and architecture. "SalesLogix is a very cost effective solution due to its integrated architect platform which eliminates the need for time consuming and expensive third party development tools."

After ensuring that all business units provided a champion to ensure the business specification covered the complete business, Coronation and iSquared created a technical specification. The development was then performed jointly, with iSquared focusing on the customised functionality of SalesLogix and Coronation on the data stored procedures. The Personal Investments unit of the business moved onto the application first, followed shortly afterwards by the Institutional Business unit.

Beaumont says that Coronation's clear business needs were easily translated into the appropriate functional and technical specifications. "The team work was textbook and the project was delivered to specification, on time and within budget - which is virtually unheard of today."

### ***The benefits***

De Graaf says that the value of the SalesLogix implementation undoubtedly lies with the critical central view it has provided. All users now have access to email and issue tracking, as well as client interaction and relationships across accounts and contacts, in a central store.

SalesLogix has enabled Coronation to realise its client-centric strategy with ease. "One of the biggest risks a company has is that when someone leaves their employ they take a large amount of client knowledge with them - or wipe it off the system wherever it was informally stored," says de Graaf.

“With SalesLogix, all business contacts and emails are attached to the specific contact and shared across the business.”

### ***The Future***

On the back of the successful implementation of SalesLogix, Coronation says that its future planning will continue to revolve around client service excellence and the use of technology in achieving this. “Technology makes for ease of communication. It is critical to have a good insight into your client base so that you can communicate the appropriate message to the appropriate client,” de Graaf says.