



## How a Major Financial Services Company Met Its Client Relationship Needs

Integrated Client Management for Microsoft Outlook



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## Company Profile

A major distributed financial services company offering personal and institutional investing services. It is one of the nation's largest full-service securities firms with more than 1,800 financial consultants and 5,000 employees. The company serves individual investors and businesses through offices coast to coast, and capital markets and correspondent clients in select U.S. and international markets.

## The Challenge

As part of an upgrade and roll-out of over 4,000 new workstations to the company's brokers, assistants and managers, this company also needed to migrate from several obsolete, unsupported software systems, as well as improve the efficiency of their operations. As a result, they determined that they had the following needs:

- **Replacement for the unsupported Janna CRM product**  
Several years ago, the Janna CRM product was purchased by Siebel and then discontinued. Siebel's only upgrade path was to their full CRM product at a cost of several million dollars. While this product was in use in some other parts of the bank, the expense was judged not acceptable for a solution that did not satisfy the major needs of the users.
- **View all client activities from within Microsoft Outlook**  
Nearly all communications between brokers and their customers is via e-mail or phone calls. By being able to stay within Outlook, brokers would quickly learn to use the new system, as well as improve their responsiveness to customers.
- **Secure access to client information**  
A key requirement of any CRM system was the ability to control and isolate access to client information. While a broker, a broker's manager and their assistant would need access to this information, other brokers, managers and assistants should be prohibited from having access.
- **Centralization of all Microsoft Exchange and other database servers**  
A major cost reduction effort that coincided with the workstation upgrade project was the consolidation of all Microsoft Exchange servers into a central location. In addition to the Exchange servers, all other data servers would be centralized.
- **Scalable support for thousands of simultaneous users**  
As a large distributed organization, in the past they had relied on a large network of distributed servers to support their network of branch offices. A consequence of the consolidation of servers in a single location was the requirement that the selected CRM product perform well when thousands of simultaneous users are accessing the system.
- **Access all client information when disconnected from the network**  
More and more brokers were visiting clients and working in a disconnected state. To effectively work this way, all of the client information systems needed to be able to support disconnected operation and then automatically synchronize when reconnected to the network.

## ***The Solution: Teamscope CRM™ for Outlook®***

The company evaluated several options over a year-long pilot period and selected Teamscope CRM™ for Outlook® in conjunction with Outlook 2003 as the best solution for their requirements. Teamscope CRM™ for Outlook®'s deep integration with Outlook was a major factor leading to productivity improvements since the client information was now so readily available since brokers no longer needed to jump between different products with different user interfaces. In addition, Teamscope CRM™ for Outlook® offers complete access to client information, both on-line and off, and when used with Outlook 2003's new Cached Exchange Mode, is highly scalable, able to support thousands of distributed users accessing the centralized Exchange servers. Teamscope CRM™ for Outlook®'s Workgroup Security feature, used in conjunction with Exchange permissions, isolated brokers from each others' client information, while permitting assistants and managers full access.

*"Due to its deep integration with Microsoft Outlook, Teamscope CRM™ for Outlook® was quickly accepted by our brokers, and immediately improved our customer service levels. The additional cost savings we derived from both our server consolidation and avoiding the vendor-mandated upgrade to our existing standalone CRM product more than paid for Teamscope CRM™ many times over."*

**Vice President  
Major Financial Services Company**

## ***TeamScope Benefits***

TeamScope Software develops and markets CRM and other collaboration software based on Microsoft's Outlook and Exchange Server technology. Utilizing the advanced data integration and communication capabilities of these key Microsoft platforms, TeamScope creates products that accelerate business processes and dramatically enhance individual and group productivity.

Fundamentally, TeamScope's software products augment and extend Outlook and Exchange to supply dedicated business solutions for broad classes of business needs, such as Customer Relationship Management (CRM) and business process workflow control.

TeamScope was founded in 1999 by software industry veterans Phil Seeman and Paul Woodworth. The founding principle of the company is to make work easier to do and to increase management effectiveness in daily business operations. While many software products offered in the market today are installed as separate applications, TeamScope's unique approach is to create advances within the Outlook/Exchange environment itself. By doing the extra work to tightly integrate these systems, TeamScope solutions streamline any business function that incorporates email communication, contact management, or task coordination.