

# CREOTEC



Client

FJF Financial Solutions

<http://www.fjffinancialsolutions.com>

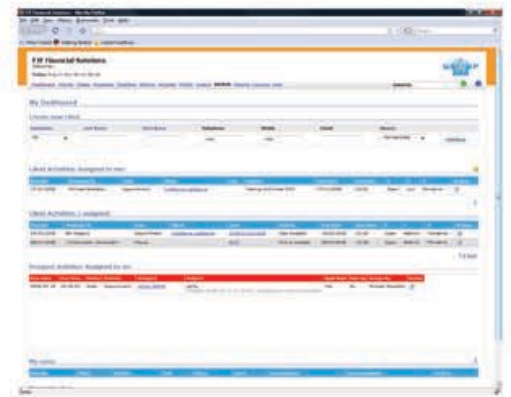
## Challenge

FJF Financial Solutions is a highly successful UK-wide organisation that offers financial solutions to individuals and companies who are experiencing financial difficulties or cash flow problems. It is a company in a hurry with ambitious plans to expand overseas into markets as diverse as Holland and Pakistan. The company recognised that the ability to do this was dependent on putting in place a more effective way of managing their clients and prospective clients; they needed a CRM system. Time was tight, so an off-the-shelf package seemed to be the simplest solution. It quickly proved to be inflexible, unsuitable for their fast-growing business and not sufficiently robust - they realised that they required a system designed for their specific business needs and they needed it quickly.

## Solution

Creotec has built its reputation on delivering fast, robust and business-enhancing IT solutions. We quickly and rigorously defined FJF Project's requirements. We recognised that security was paramount, that the system needed to support multiple users, each group with their own specific requirements; it needed to have a multi-currency capability and the flexibility to be re-branded under different trading names for the different geographic markets.

We designed the system as a web application using Web2.0 technology to make life as easy as possible for the users. Each account manager has their own bespoke home page ensuring the new system becomes an integral part of their way of working. The system was successfully launched in January 2008, with trainers trained to ensure fast adoption of the new system, only 2.5 months after Creotec had been called in.



## Positive Change

Feedback from users has been overwhelmingly positive and the management of clients and prospective clients has improved dramatically. The system allows account managers to manage multiple cases under one name, calculate expenditure for each case and flags outstanding payments. It has a query-builder that enables different prospect groups to be targeted, for example prospects in specific geographic areas. In addition, the system is proving to be a vital tool for senior managers running the company as it allows the monitoring of account manager and consultant performance against target. Adoption has been universal.

We built the system to accommodate future plans, and phase 2 is already underway.

