



# Utilizing CRM Applications for International distribution

**ON COURSE ADVISORS**  
**Civicom**

**Informational Exchange**

**Web Ex**

**Date: Thursday – July 22, 2010**

# Program Overview

- Agenda
- Review consolidated information gathered through informational exchange questionnaire from CRM Forum Member Firms
- Question & Answers

## Panelists:

- Amy Belew AllianceBernstein
- Katey Gaffney Man Investments

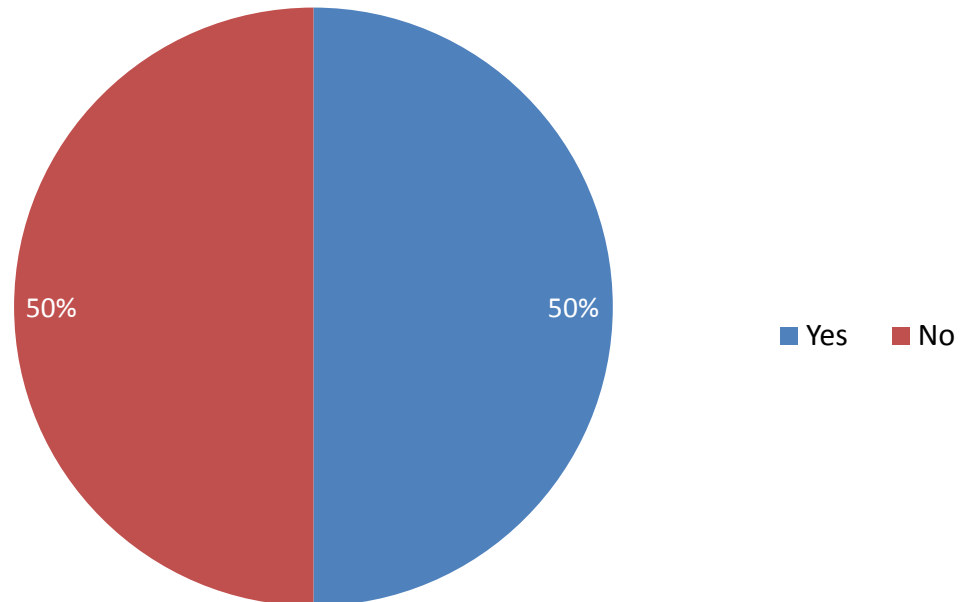
## Host:

- Kate Xenelis Civicom

# CRM Deployment

Half of the firms within the CRM Forum are servicing non US locations

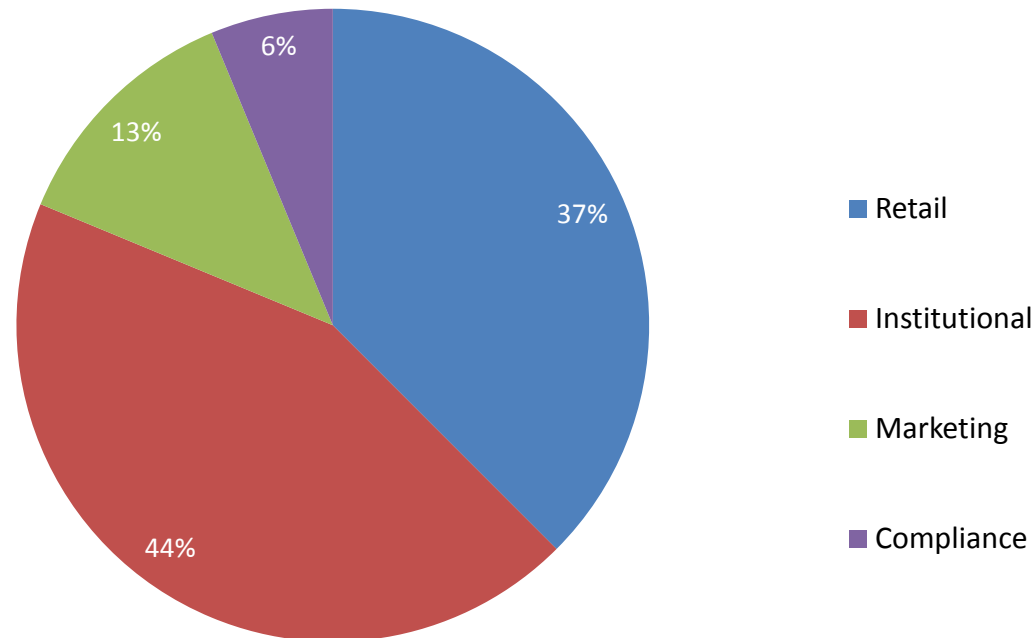
Does your current CRM Deployment include servicing non US / non Domestic locations?



# User Groups

- Most users of CRM applications tend to be the sales professionals in both the Retail and Institutional channels
  - Some CRM Technologists are providing their Marketing and Compliance teams with access to improve service and transparency of sales activities

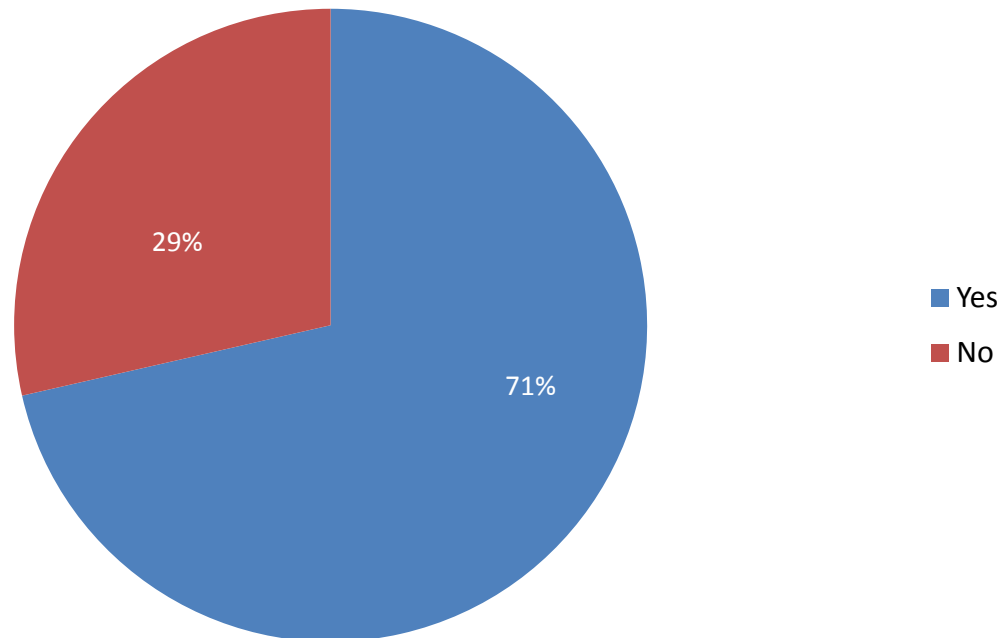
**What lines of business does your CRM Support?**



# Integration with domestic CRM

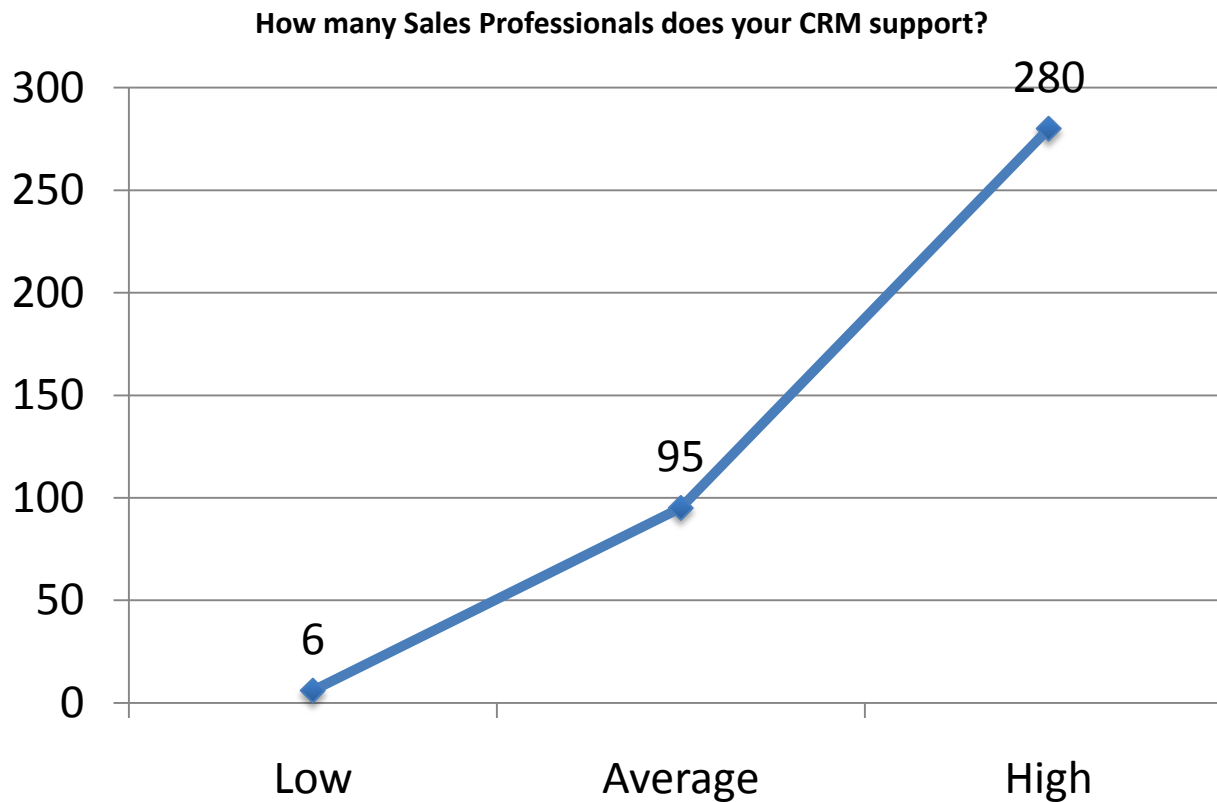
- Overwhelmingly, CRM professionals look to integrate their domestic and international CRM applications

Is it integrated with your domestic CRM Deployment?



# Sales Professionals

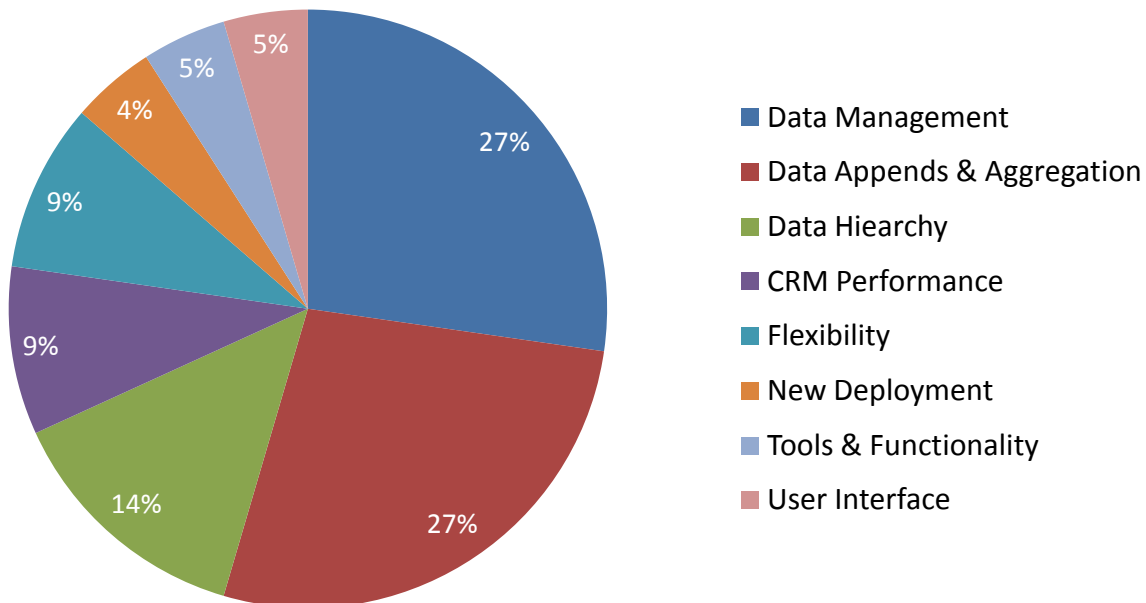
- Participants in the study manage a diverse range of sales forces
  - The largest sales team in the study included 280 international professionals, with the average at 112



# Top 3 Priorities

- Over half of those surveyed are focusing most of their efforts on:
  - Improving their Data Management activities (e.g., implementing new data processes, standardizing data methods)
  - Enhancing their data by sourcing new information and aggregating key information for easier analysis/reporting

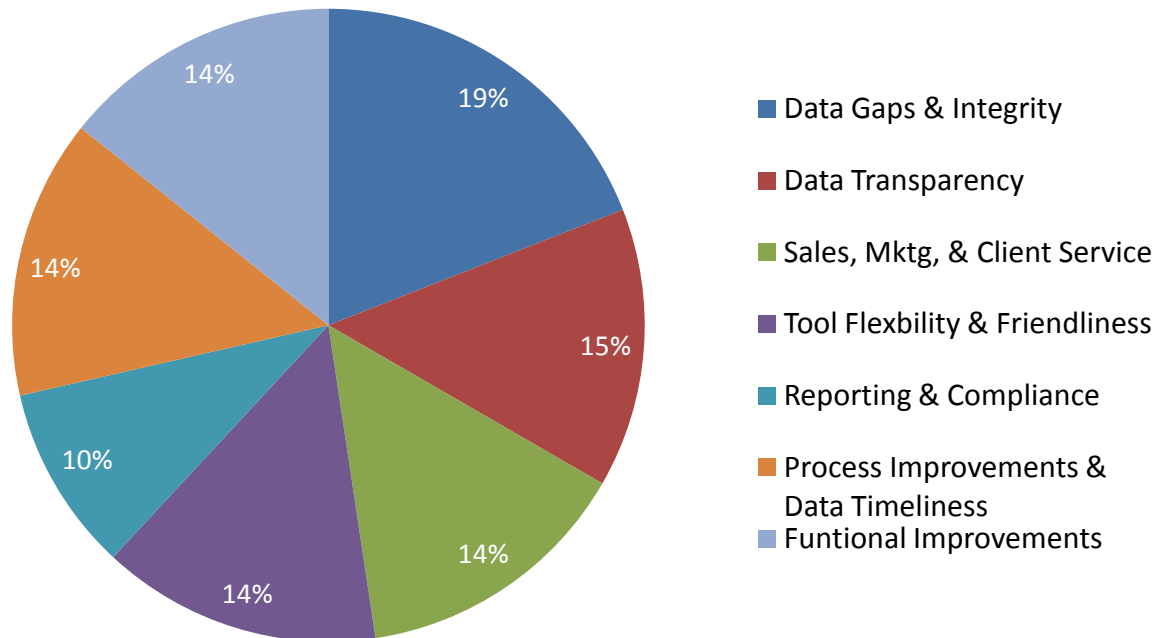
**What are the three most significant enhancements that you would like to implement?**



# Benefits to Implementing new Priorities

- By implementing the enhancements, most CRM teams expect to:
  - Fill in missing data and the reliability of their information
  - Create greater transparency of their data
  - Provide their Sales and Marketing teams the ability to more effectively service customers

## Where do you expect to realize enhancements from resolving these issues?





# Panelists Discussion

Moderator: Kate Xenelis Civicom

Amy Belew AllianceBernstein

Katey Gaffney Man Investments

Questions ?

Highlight the challenges that exist in deploying internationally?

Identify the key benefits that will be realized with full implementation ?

# Thank You

Tony Busacca On Course Advisors

[tony@on-course-advisors.com](mailto:tony@on-course-advisors.com)

Kate Xenelis Civicom

[kate@civi.com](mailto:kate@civi.com)