

Microsoft SharePoint Customer Reference



Customer profile

Marcuard Family Office is an independent multi-client family office in Zurich. It provides its international customers with an integrated approach to managing their financial, legal and private matters.

Current situation

Marcuard Family Office did not have an enterprise-wide CRM system. Customer information was decentralised, being located in more than one system and/or with individual employees, and was therefore often not consistent. Information was exchanged with customers via an old user-unfriendly platform.

Solution

Based on the Microsoft standard technologies SharePoint and SQL Server, the IT team at Marcuard Family Office developed a combined customer portal/CRM solution. This provides customers and employees with individualised, consistent information as required, and contains extensive financial analysis and reporting functions.

Results

The portal solution brings significant improvements in quality, greater efficiency, and simplifies communication with customers. The high degree of automation and the completely automatic dynamic filing system relieves the employees of administrative work. Employees can create detailed analyses and reports directly from the cockpit within minutes.

A custom-tailored CRM system for Marcuard Family Office

Marcuard Family Office in Zurich has implemented an efficient, combined customer portal and CRM solution for a family office, based on the Microsoft standard technologies Microsoft® SharePoint® and Microsoft® SQL Server.

«Thanks to the Microsoft products, we were able to build an integrated platform for our customers and employees.»

Simon Minder, Chief Information Officer, Marcuard Family Office

The Zurich-based Marcuard Family Office works differently from a traditional financial services provider. Families with complex requirements generally do not have just one central contact person, but can directly access a network of specialists in finance, tax and legal matters at the same time. Many customers have very complex asset and family structures crossing several generations, but may also have trusts and companies and/or subsidiaries, which can all have individual bank connections. A "off-the-peg" CRM would not be able to fulfil these requirements. The IT team at Marcuard Family Office realised this and developed a highly scalable combined customer portal/CRM solution based on Microsoft standard technologies such as SharePoint and SQL Server. A very high degree of automation and the seamless integration of IT solutions for portfolio consolidation and reporting has resulted in a powerful tool for customers and employees.

«The new solution is highly automated, which has a positive effect on efficiency, but above all on quality.»

Lukas Gadola, Solution Engineer, Marcuard Family Office

Further informationen

If you would like further information on Microsoft products and services, please contact your local Microsoft office:

Microsoft Schweiz GmbH

Richtistrasse 3
CH-8304 Wallisellen
Phone +41 (0)848 22 44 88
Fax +41 (0)43 456 44 44
www.microsoft.com/switzerland
www.microsoft.ch/references

Software und Services

- Microsoft SharePoint
- Microsoft SQL Server

Key figures

Project duration 3 years

Improvements

A complete customer portal/CRM solution based on Microsoft standard technologies; a cockpit for each customer with all relevant information such as asset allocation, performance, information on financial products, e-mails, current documents and tasks; central data management ensures consistent information; role-based control of access to information – each employee sees only the information relevant to him or her; automatic workflows for e-mail and document allocation, including generation of PDF files; more secure remote access; seamless integration of financial software for portfolio consolidation and reporting; generation of analyses, reports and presentations within minutes; extensibility of communications functions using Microsoft® Lync™; high level of security due to automatic backups.

Customer profile

Marcuard Family Office is an independent multi-client family office in Zurich that specialises in integrated consulting for families with complex ownership and asset structures. Twenty-five highly qualified employees provide the company's international customers with an integrated approach to managing their financial, legal and private matters. The spectrum of services includes asset management, tax and legal advice, trusts and succession planning, and also family philanthropy, concierge services and IT services.

Current situation

Until recently, Marcuard Family Office did not have an enterprise-wide CRM system. Customer information was to some extent decentralised, being located with the individual employees, and was therefore not always consistent. A traditional «spreadsheet and e-mail culture» ruled. There was a central platform for document exchange, but it was not user-friendly and sometimes demanded too much of the customers. Chief Information Officer, Simon Minder, says, «We wanted something new. We envisioned a user-friendly cockpit that provided each customer – and at the same time each employee – with an up-to-date, individualised and consolidated view of all relevant information.»

Solution

Since there was no suitable «off-the-peg» CRM system, the Marcuard IT team themselves developed a combined customer portal/CRM solution based on Microsoft standard technologies. The front end is a SharePoint cockpit, which the customer can use to quickly and easily access all relevant information such as asset allocation and performance, information on financial products, e-mails, current documents and tasks pending. Customer informa-

tion is consistent, and is available internally via the same cockpit, with each specialist seeing only the information that is relevant to him or her. At the heart of the data technology is an SQL database. Using specific financial software, market data is consolidated according to the individual customer's requirements and fed into the database. Additional financial information is derived from external financial information services or entered manually by the specialist. The SQL database also serves as the data source for a seamlessly integrated reporting module, allowing multi-dimensional mapping and viewing of data.

Results

The portal solution brings significant improvements in quality, greater efficiency, and simplifies communication with the customers. The high degree of automation relieves the employees of administrative work. E-mails are automatically uploaded from Exchange to the correct customer cockpit, and internal documents are converted into PDF files and assigned to customers via a workflow. The system distributes legal documents according to region and content. Due to the integration of the reporting module, employees can generate extensive analyses for portfolio optimisation and wealth projection from the portal within minutes – including ready-to-use presentations. Simon Minder and his team are particularly proud of the innovative document-filing system. He says, «The extremely complex structures of these families cannot be mapped with a static folder structure. The dynamic filing system that we developed takes this complexity into account. Each individual or legal entity is entered, linked into the hierarchical structure, and the pertaining documents are also linked. The same principle is used for legal entities as well as individual family members. The system recognises this logic and can automatically allocate new documents correctly within the hierarchy.»