Financial-Clarity CRM Solutions

All the insights you need to help grow your business

Total Intelligence

MatrixSolutions
A FACTSET Company

For almost 30 years' we've been helping our clients manage their customer and business intelligence systems to achieve maximum revenue growth and operational efficiency.

Using our experience and insights and partnering with the world's leading cloud-based Customer Relationship Management (CRM) system - Salesforce, we have developed a range of solutions covering everything from a complete new organisation-wide CRM implementation down to our plug-in App for our industry benchmarking tools.

Salesforce, our Partner of choice

To be effective in business you need to be able to track and assimilate information from several different sources. Even the smallest organisations will have accounts, invoices, orders and budgets. Keeping on top of them can be a challenge which will require a highly effective and competent CRM System.

Over 100,000 businesses have decided to deploy their CRM requirements through Salesforce. It's the fastest-growing CRM system in the world, thanks to its simple, intuitive and cloud-based user interface.

The key to Salesforce's success has been the way they have created accessible and information-rich dashboards which can be easily customised to suit the requirements of each user. This approach mirrors Financial-Clarity perfectly.

The process of managing your customers and prospects correctly is the backbone of any effective business strategy, and it seems that Salesforce has discovered the perfect balance of automation and human decision-making, that's why they are our partner of choice.

A CRM solution to suit all needs

We have developed a range of solutions that can help you define and implement your requirements.

Whether you're:

- Considering the implementation of a CRM system for the first time,
- looking to migrate to Salesforce from a different CRM system like Sage, SAP or Microsoft Dynamics, or
- already using Salesforce.

Our Financial-Clarity Salesforce Consultancy

Our Financial-Clarity Salesforce Consultancy is for those clients that would like a brand new Salesforce implementation. We will work with those clients to establish their desired workflows and translate those into a bespoke Salesforce implementation and configuration.

Our Financial-Clarity Single Intermediary View (SIV)

Our Financial-Clarity Single Intermediary View (SIV) is for those existing CRM users who wish to clean and enhance their existing set-up or migrate from a different CRM System. We're well-versed in working with external consultants to ensure that the Financial-Clarity databases, data feeds and benchmarking solutions can be seamlessly integrated into your system.

Total-Clarity - Our Managed Package

If you are already using Salesforce, then you can also take our Managed Package application (Total-Clarity) that will provide you with access to all of the intelligence from Financial-Clarity within Salesforce itself with a minimal amount of CRM architecture changes.

Our Financial-Clarity Salesforce Consultancy

Here's how you could use our Financial-Clarity Salesforce Consultancy in more detail:

Full Implementation

Our impressive client list includes some of the largest financial services firms in the UK, and the likes of Fidelity and Blackrock investments have all benefited from full Salesforce implementations. Typically these implementations have included an element of data integration and migration from an existing CRM provider, and the installation of the relevant Total-Clarity Managed Package to ensure that our clients have CRM systems already populated with the data to organise their sales and marketing strategies. Our comprehensive consultancy workshops ensure that each client's solution is tailored to their specific requirements.

CRM Support

Our Salesforce consultants can implement a support package that offers an on-site training session. An "Expert for a Day", in which our consultants are available onsite for a mixture of consultative and practical assistance to help you get the most out of Salesforce.

If your organisation doesn't have the budget for on-site CRM administrators, then the off-site telephone-based - in-screen support option could be a perfect solution for you. Either way, we start by assessing your overall requirements and will put forward a proposal of different support packages to suit your budget.

FastStarts

FastStarts is our 10 day-build project which gets our clients up and running with a Salesforce system that is configured to initial broad requirements. This can be suitable for clients with limited existing data and configuration requirements, and those who wish to start with a prospect universe provided. This is a popular project that allows smaller firms to ascertain how best they'll be using the system before creating a more detailed CRM development project to suit their working practices.

Our Financial-Clarity Single Intermediary View (SIV)

Some existing CRM users just require a few adjustments to their current solution to ensure that they are using it in the most effective way possible. Others wish to clean and enhance their existing set-up.

Our consultants at Matrix offer a full CRM optimisation service to help you and your organisation to implement and execute a successful customer relationship management system.

Total-Clarity – Our Managed Package

Working in conjunction with our SIV offering, the Total-Clarity application contains the comprehensive market intelligence and aggregated transaction data that you'll find in Financial-Clarity, yet places this at your disposal within tabs, look-up panes and Visualforce panels within your existing CRM records.

In short, Total-Clarity offers a centralised view of all your intermediary clients and prospects, and gives you the ability to compare, upload or amend CRM records at the click of a button.

The MFID Total-Clarity is automatically updated, which means that whenever your financial intermediary clients and prospects move, change names, addresses, qualifications or business profiles, you immediately have access to the very latest information from Financial-Clarity which you can choose to update your Salesforce CRM records.

Total-Clarity Product Features

We've designed this product to make everything as simple and accessible as possible.

Single Sign-on

Once Total-Clarity has been installed successfully; you'll only ever need to log in to your Salesforce account to be able to access the full functionality of Financial-Clarity. In addition, there is a button within each account and contact record which will take you directly to the relevant selection within Financial-Clarity.

Visualforce Panels

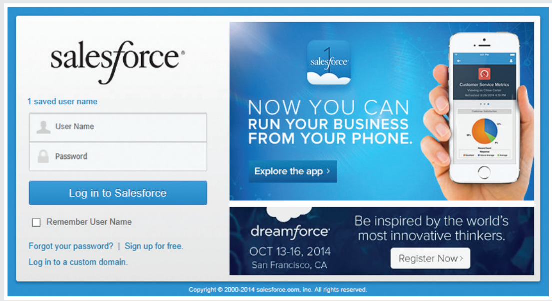
Within each record held in your CRM system for UK Intermediaries, you'll see an additional panel of detail below the main record. This panel contains a number of interactive charts to allow you to get a detailed view of both your own transactions and market-level transactions. The panel also includes a whole host of useful and constantly-updated information at both account and contact level that we holding Financial-Clarity.

You'll be able to see up-to-the-minute contact information, business areas, profiles, market sales, permission levels and email addresses. This ensures that the user immediately benefits from relevant and updated own sales and marketing information within the Salesforce account or contact record, without needing to import information or moving off the page.

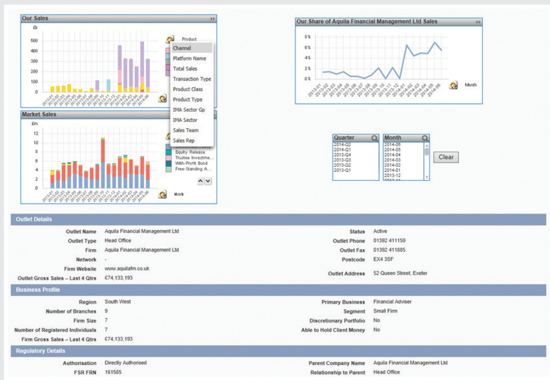
Search Facility in Financial-Clarity

The user has the ability to look up any firm contact in Financial-Clarity using a range of search facilities across a number of fields at firms or contact level. Once the correct record has been identified, the data can be compared which allows the user to quickly identify and upload new firms and associated contacts without the need to manually key in any information.

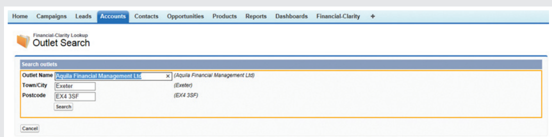
This facility can be used both to maintain data hygiene standards on existing records and to facilitate correct information at both account and contact level.



Single Sign-on



Visualforce Panels

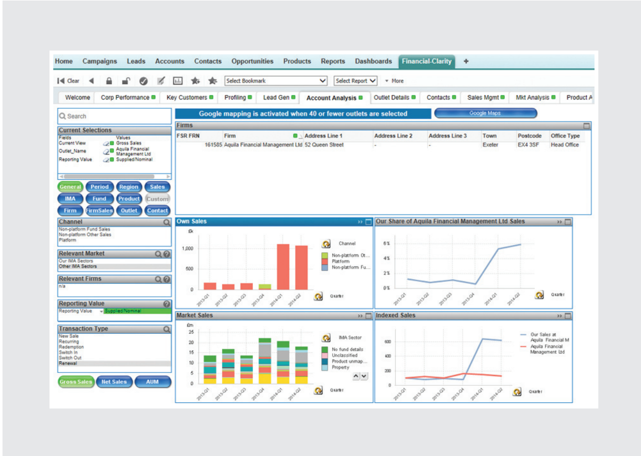


Search Facility in Financial-Clarity

Dashboard Access

If the user wants to conduct some deeper analysis on a firm, the Financial-Clarity product will immediately be launched on the relevant page from the client contact page within Salesforce, allowing them access to its fully functional analytical capabilities.

For example, if you're interested to learn how the overall market sales of a particular type of asset have changed for your client over the past six months, you can simply press the Market Sales button within the Financial-Clarity tab and you'll automatically be taken to the relevant screen. This will help you determine your sales strategy as you run queries to locate the IFAs that fit the expansion and sales profiles you're looking to target.



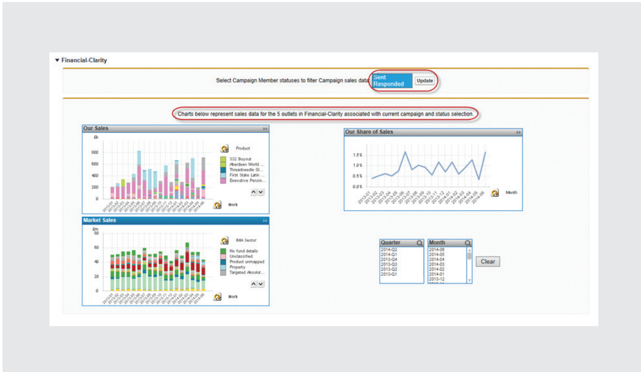
Dashboard Access

Campaign Object Functionality

This provides the user with an easy and flexible way to add data from Financial-Clarity campaign lists to campaigns created in Salesforce.

Furthermore, for any campaign created in Salesforce, a Visualforce panel will be displayed within the Salesforce campaign record, showing sales data from Financial-Clarity for all contacts in the campaign that are linked to Financial-Clarity records.

The information displayed can then be manipulated to analyse sales for different campaign responses for the campaign members.



Campaign Object Functionality

Contact us

Please feel free to get in touch with us using the details below.

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