MatrixSolutions
Inside Intelligence

Matrix Salesforce CRM Products & Services

1. MATRIX SALESFORCE CRM SERVICES

MatrixSolutions
Inside Intelligence

Over 104,000 businesses have decided to deploy their Customer Relationship Management (CRM) requirements through Salesforce. It's the fastest-growing CRM system in the world, thanks to its simple, intuitive and cloud-based user interface and the immediately measurable enhancing it brings to every single business that uses it. 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.

At Matrix, we've spent nearly 30 years helping our clients manage their customer and business intelligence systems to achieve maximum revenue growth and operational efficiency. Therefore it's a completely natural evolution of our business strategy to align ourselves with what we consider to be the best customer relationship and operational management system in the world. Ever since we've been Salesforce partners, we've embarked on a variety of projects to help our clients maximise their operational efficiencies and data management process using Salesforce. In the last four years we have worked with several of the largest fund management groups in the industry, implementing and delivering effective CRM solutions for our clients such as Fidelity, Blackrock, Invesco, Legg Mason and Allianz. As more and more of our clients and prospects across the financial services industry see the benefits of a complete Salesforce implementation when purchasing Financial-Clarity and our Total-Clarity Application, Matrix Solutions finds itself in an ideal position to make this transition for you as smooth and efficiently as possible.

This factsheet showcases our key Salesforce-related products, covering everything from a complete new organisation-wide CRM implementation down to our plug-in App for our industry benchmarking systems. Please take a look through our various products and services and contact one of the team if you'd like to find out how we can help you.

Ian Beaumont

Ian Beaumont
CEO, Matrix Solutions

2. SALESFORCE - A BRIEF OVERVIEW

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, emails and budgets, and keeping on top of them can be a challenge which will require a highly effective and competent Customer Management Relationship System (CRM). Salesforce is the world's leading cloud-based CRM system, and it facilitates the centralisation of all the tools you need to keep your business running. Founded in 1999 and based in San Francisco, the Salesforce platform allows its subscribers to organise all of their important business information in an intuitive manner to help save time and increase efficiency. It is now the fastest-growing CRM system on the planet and with over 2.1 million subscribers; it was named 'Most innovative Company in the World' for a second consecutive year by Forbes in 2012.

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. The main screen contains tabs which can show the user their key accounts and targets, their tasks for the day and dashboards showing their overall performance. One popular feature included is the ability to be able to synchronise Salesforce to your Microsoft Outlook account, allowing you to centralise all of your calendars and emails into one place which you can access from a range of different devices.

In addition to their CRM offering, Salesforce offers an AppExchange marketplace for cloud computing applications built for the Salesforce community and delivered by partners or by third-party developers which users can install and add to their Salesforce environment. There are currently over 1,000 applications available on the AppExchange and these are built by Salesforce partners within their own developer platform, called 'Force.com' using proprietary coding languages Apex and Visualforce.

A partner for nearly three years, Matrix has created Total-Clarity, a Salesforce Managed Packaged application integrating our Matrix Intelligence Products Financial-Clarity and Mortgage-Clarity with Salesforce.

3. YOUR CURRENT CRM REQUIREMENTS

We can help you define and implement your requirements whether you're:

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

Our consultancy package is for those clients that would either like a brand new Salesforce implementation, or for existing users who wish to clean and enhance their existing set-up, all of which can be managed directly by Matrix. Our Matrix Partner package is for those companies that already have a Salesforce consultancy in place. We're well-versed in working with external consultants to ensure that Matrix's intelligence databases, data feeds and benchmarking solutions can be seamlessly integrated into your system. If your system is already up and running successfully then we can simply supply you with our Managed Package Application that will provide you with access to all of the intelligence from our systems with a minimal amount of CRM architecture changes.

A. Matrix Consultancy

i. Full Implementation

Our impressive client list includes some of the largest financial services firms in the UK. The likes of Fidelity Investments, Blackrock, Cazenove and Nucleus have all benefitted 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 comphrensive initial consultancy workshops ensure that each client's solution is tailored to their specific requirements.

ii. FastStart

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

iii. CRM Review

Some existing Salesforce users just require a few adjustments to their current solution to ensure that they are using it in the most effective way possible. Our Salesforce consultants at Matrix offer a full Salesforce optimisation service to help your organisation implement and execute a successful customer relationship management strategy. Furthermore, we offer 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.

iv. CRM Support Package

Our Salesforce consultants can implement a support package that offers both on-site training and off-site telephone-based / in-screen support. If your organisation doesn't have the budget for on-site CRM administrators, then this option could be a perfect solution for you. We start by assessing your overall requirements and will put forward a proposal of different support packages to suit your budget.

B. Matrix Partner

We are happy to work with your existing Salesforce consultants and we can provide our expertise in dealing with the process of integrating our product range on a consultative basis. Our flexible position enables us to pick up as much of the development side as you require. Recently, we have worked on a number of successful projects with Alpha Financial Markets Consulting, which have involved integrating Financial-Clarity and our Financial Intermediary Database to create a Single Intermediary View, integrated via our market-leading Total-Clarity Managed Package. We have also worked with a number of other Salesforce partners and consultancies. As such, we are happy to be involved in consultancy and advise as much or as little as is required, always ensuring that the client's needs and objectives are our absolute focus.

C. Matrix Salesforce Application - Total-Clarity

Matris is also proud to offer our own Managed Package Application for Salesforce, Total-Clarity. Our industry-leading data aggregation and benchmarking products (Financial-Clarity and Mortgage-Clarity) have been packaged up into a plug-in application which is available to all clients who are currently using Salesforce as their CRM system.

The Total-Clarity application contains the comprehensive market intelligence and aggregated transaction data that you'll find in our industry-wide products, 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.

Total-Clarity is automatically updated, which means that whenever your financial intermediary clients and prospects move, change names, addresses or business profiles, you immediately have access to the very latest information from Financial-Clarity or Mortgage-Clarity within your Salesforce CRM record.

Total-Clarity for Financial-Clarity – Product Features

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

1 - 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.

2 - 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 hold in 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 MI information within the Salesforce account or contact record, without needing to import information or moving off the page.

3 - 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.

4 - 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 either the account or client contact pages 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.

5 - Campaign Object Functionality. Total-Clarity offers complete integration with the Salesforce Campaign object. It 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. The information displayed can then be manipulated to analyse sales for different campaign responses for the campaign members.

4. WHAT OTHER PRODUCTS AND SERVICES DOES MATRIX OFFER?

Intelligence




We have several proprietary databases covering the Financial and ICT sectors in both the UK and across Europe. Each of our databases is underpinned by our dedicated research teams and innovative intelligence gathering sources, ranging from dedicated website resources through to trade subscription information.

Enhanced Intelligence


We have two bespoke services to help our clients improve their data:

- Clean CRM - A cleaning and matching service that weeds out poor data and enhances it with data from our own sources
- Single Customer Views - an integration service that correlates data from various internal information management systems as well as appending the third party lifestyle and demographic information to build a complete picture of your clients.

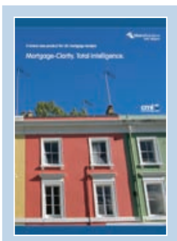
Inside Intelligence



A range of business intelligence consultancy services that offer optimum results to our clients. Includes:

- Profiling & Segmentation
- Prospecting
- CRM Integration & Building
- Bespoke intelligence systems using FastStats and Web-based analytics applications.

Industry Data Aggregation Solutions

Financial-Clarity - A business intelligence tool developed exclusively for the UK financial services industry. It contains three parts:

- Aggregated market sales data from financial product providers and platforms in the UK
- The MFID – the most comprehensive IFA database on the market
- A web-based interface which provides easy access to analysis of the user's own sales.

Financial-Clarity International - A brand new intelligence tool for tracking and analysing cross border fund flows. It allows participating firms who contribute their international transaction data to:

- Gain a view of the aggregated market, giving them insight into their relative sales performance and the best business development strategies for their products based on the latest market trends.
- Search, visualise and analyse gross sales, net flows and AUM of funds between international borders.

Mortgage-Clarity - A business intelligence tool developed exclusively for the UK mortgage industry. It contains three parts:

- Aggregated market sales data from financial product providers and platforms in the UK
- The MFID – the most comprehensive IFA database on the market
- A web-based interface which provides easy access to analysis of the user's own sales.

5. WHAT SHOULD I DO NEXT?

Contact one of the team on 020 7074 1200 and we can discuss your requirements.

Visit our website at matrixsolutions.co.uk to see examples of how our clients have improved their operational efficiency and boosted revenues using Matrix Solutions

Email us at info@matrixsolutions.co.uk to request a data audit.

Visit us at our London offices at 55 New Oxford Street, London WC1A 1BS to discuss your requirements.

MatrixSolutions
Inside Intelligence

Matrix Solutions, 55 New Oxford Street, London WC1A 1BS
Registered no: 1934498
Tel: +44 (0)20 7074 1200 : Fax: +44 (0)20 7074 1201 : Email: info@matrixsolutions.co.uk : Web: www.matrixsolutions.co.uk