



CASE STUDY

**CLYDESDALE AND YORKSHIRE
BANKING GROUP (CYBG)**

DYNAMICS 365 FOR SALES





CASE STUDY



CYBG boosts credit turnover and gains 3,173 working days with Dynamics 365 for Sales

BACKGROUND

6 million customers

CYBG has 2.7 million customers and in October 2018, acquired Virgin Money who have 3.3 million, becoming the UK's sixth largest bank with a combined 6 million customers.

175 years heritage

The combined brands have £84bn of assets and £70bn of customer loans. Small Business Banking at CYBG look after 177,000 clients, each with credit portfolios up to £2 million.

£84 BILLION in assets

At double the size of any UK challenger bank, CYBG 's vision has customer experience, innovation and digital transformation at the heart of it. Leading with immersive technologies, agile systems and sound data processes to deliver impeccable standards of service and customer excellence. The CYBG brand integrates into the globally recognised Virgin Money brand over the next three years, with the Virgin brand mark front and centre.

COMPANY

Clydesdale and Yorkshire Banking Group (CYBG)

INDUSTRY

Financial Services

SOLUTION

Dynamics 365 for Sales

DATE

2017 - 2018

THE CHALLENGE

The group's challenges prior to engaging with Redspire were lack of centralised data centres and poor central reporting for Regional Managers and Team Managers in the Small Business Banking division.

Multiple disparate legacy systems, manual search 'trackers' for finding customer information and collating with MI and financial data were resource heavy. Tracking customer engagement, pipeline and sales were extremely labour intensive.

THE VISION

CYBG collaborated with Redspire to create and deliver a simple but effective vision:

To enhance the customer and employee proposition in Business Direct Small Business Banking and deliver improved cross sales, lead management, capacity creation and management information (MI), by building a cloud based Microsoft Dynamics CRM system.



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END USER FEEDBACK

Within just a few hours' post-implementation, I'd identified circa 100 opportunities [via the new CRM], that I otherwise wouldn't have uncovered. The ability for Managers to identify and share these high-value opportunities with the team is completely transformative to our business.

David Maxwell, CYBG Relationship Manager

THE SOLUTION

Dynamics 365 for Sales

0365 integration

CUSTOM WINDOWS application

The Dynamics 365 for Sales business application was utilised for opportunity management; leveraging pipeline and goal reporting. Native Dynamics 365 to O365 integration was used for word document generation against opportunity data. These word documents, along with specific "Export to Excel" outputs, are being used for cross-departmental collaboration while the bank continue through an ongoing period of digital transformation.

A custom Windows application was built to facilitate the transfer of data from multiple disparate source systems into Dynamics 365. This application has been responsible for the enriching of bank customer data and has provided Relationship Managers with key decision making data at their finger tips; creating a better customer experience during communications.

BUSINESS OUTCOMES

Implementing D365 within Small Business Banking has driven increased opportunity identification and boosted sales. Replacing multiple Excel trackers with a Dynamics based CRM system created time efficiencies and vastly improved customer engagement tracking. Dashboard MI is available in real time, providing operational insight, and improving financial reporting. Proactive Opportunity and Retention dashboards for each user, coupled with immersive training on querying the Dynamics database to build call lists has aided in a cultural shift in how the department approaches relationship management, switching from product salespeople, to become consultative business advisors who are trusted extension of their client's business.

11x increase on customer outreach calls

improved customer outreach levels by **15%**

Productivity increased by **3,175** working days

drove **CULTURE CHANGE** throughout organisation