Creatio

MIGDAL CAPITAL MARKETS

Migdal Capital Markets, Israel's largest financial group, is a renowned investment house with over 50 years of flawless service and impeccable reputation. Migdal Capital Markets is a wholly-owned subsidiary of Migdal Holdings Group, which manages NIS 32 billion in assets and incorporates a range of financial services, including investment portfolio management, investment banking, mutual funds, and alternative financial products.

PRODUCT:
Sales Creatio, Service Creatio

INDUSTRY:
Financial Services

REGION:
EMEA

CHALLENGE:

The tools used within the company didn't meet the challenge of the company's constant need for work processes modification and couldn't adapt to the changing market trends and requirements. Consequently, **Migdal Capital Markets** considered trying out more advanced CRM and BPM solutions. Their highly competitive market was another factor forcing the company to look for a competitive advantage. On top of that, the regulations in the industry enforce Migdal Capital Markets to provide the utmost data transparency, keeping all customer data on-site. In order to address these issues, Migdal Capital Markets decided to check out the software solutions provided by Creatio.

Migdal Capital Markets had the following requirements:

- A 360-degree customer view.
- Powerful CRM and BPM capabilities.
- The ability to design custom business processes with few IT resources.
- Case management capabilities and tools to manage unstructured business processes and the ability to modify them on the fly.
- Hebrew language support.

SOLUTION:

- Customer data alignment between sales and customer service departments.
- Holistic customer profile and optimized data management provided by the system's features of data enrichment, case history, customer interactions, and communication history.
- Dynamic case management engine for customer service representatives.
- Low-code technology helping to create and adjust service-related processes and business applications more simply.
- Easy-to-use tools to carry out telemarketing activities.
- Optimized field force management providing visit scheduling, updating customer data in real time, and setting field sales rules based on different customer categories.
- Document flow automation for financial records enabling users to manage documents approval process, which involves various signers and departments.

BUSINESS OUTCOMES:

Case processing time reduced by 20%

0 Error occurrence reduced to near-zero

Increased customer loyalty

Creatio was implemented by **Proceed**, Creatio's partner. The system equipped Migdal Capital Markets with a wide range of intelligent CRM and BPM tools helping the company to optimize its business processes. Connected data for sales and customer service teams, operational transparency, and effective case management supports the company in its dynamic growth, while maintaining its leading position.

ACCELERATE