



## Bank of London and The Middle East plc expands the use of Advanced's Specialist Solution

At the Bank of London and The Middle East plc we have extended our use of Advanced's products to work in a smarter, easier and more efficient way.

### Background

At present we are the largest Islamic bank in Europe and are an independent, UK wholesale Sharia'a compliant bank based in London. We are led by a management team that brings together a combination of experienced international bankers and leading experts in Islamic finance. We offer competitive products and services that can be tailored to our customers' needs. At the Bank of London and The Middle East plc (BLME) we provide a wide range of financing solutions and investment opportunities through our various divisions.

### What we needed from Advanced

Originally we did not have a single system that supported our front office customer engagement, correspondence and document management. We wanted to explore ways of using Advanced's Specialist Solutions in conjunction with Microsoft SharePoint to support areas of the bank to achieve a series of aims:

- >Build a front office customer record with simplified document management
- >Improve customer service

>Improve the capture and maintenance of customer information

>Standardise and automate processes according to industry best-practice

>Discovering what was right for us

The solution is a combination of Microsoft Dynamics CRM and Microsoft SharePoint - Each platform works in a smarter way around client information management. The system is used primarily for Contact, Account and Opportunity management, supported by a complete interaction history for each client.

Advanced created an intelligent email attachment extraction capability for us. This enables the solution to push attached documents into SharePoint with useful metadata such as the deal it relates to. SharePoint then picks up this document and metadata to logically store the documents and make them available for other areas of the bank, such as compliance and back office processing. The solution has significantly improved the efficiency with which the customer documents are handled, stored and can be located in the future.

### Client >

BLME

### Sector >

Business Services

### Project >

Microsoft Dynamics CRM, Microsoft SharePoint

# BLME

Nigel Stevens, our Head of Business Solutions at BLME comments: *"Before engaging with Advanced, BLME had worked with a different partner to customise the system to support one particular part of the bank. While the customisations suited areas of the bank in scope, they were not able to support other areas. BLME decided to re-launch Microsoft Dynamics CRM, with Advanced's help, one business area at a time."*

In order to avoid the shortcomings of the original implementation, a project team was formed to bring together subject matter expertise across all of our business systems. The project team worked together to ensure that no single requirement or business area would dominate the project, or prevent the system from working in another area.

When so many different stakeholders are involved, it is critical that this kind of high-level solution architecture is considered at the beginning and re-validated throughout the project lifecycle.

Nigel adds: *"Each phase of the project had its own discovery, design, development, training, testing and implementation stages, making it possible for areas of the bank to start using components of the solution ahead of the launch of the complete product. This enabled us to see benefits and return on investment early on. This in turn helped improve stakeholder buy-in for future stages because they could see the benefits of previous stages in action."*

## Benefits so far

The solution was rolled out to several business areas of the bank, with plans for an organisation-wide roll out, but already the bank is seeing benefits in the deployed business areas. These include:

- > Reduced administration overhead because routine processes are automated and follow a defined structure
- > Improved customer experience due to the ease with which the client information and related documentation can now be located and maintained
- > Reduction in duplicated document storage
- > Improved visibility of client records and documentation across departments

Nigel concludes: *"The main benefit we see is the flexibility and extensibility the solution offers - it will continue to support the bank for years to come. We knew we'd made the right technology choice in Microsoft Dynamics CRM, and Advanced has proven to be a very professional firm; their insights, suggestions and ongoing support have been excellent."*

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Nigel Stevens >  
Head of Business Solutions >  
BLME

## More information

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