

CRM Case Study: QRPS

Client Overview

Qualified Retirement Plan Services (QRPS) was founded in 1988 to provide retirement plan administration services to small and mid-size companies. Managing the day-to-day affairs of the retirement plan, QRPS provides the highest level of service possible for their clients.

The Situation

QRPS' business growth was being stifled by non revenue-generating investment in inefficient, duplicate processes. The existing database of client records was over capacity and failing. This solution retained limited records; provided little flexibility or ability to provide relational data access to client information. The existing database needed to be migrated into a more flexible database designed to facilitate records retention and fast access. QRPS needed to automate repetitive processes and provide secure, fast access to client information for customer service personnel.

Business IT Professionals, Inc. designed and implemented a customized Microsoft CRM solution, which replicated the existing database using custom entities, then migrated the existing data, using Scribe, into the CRM implementation to ensure uninterrupted process flow and data retention. Once the new CRM implementation was in place, Biz IT Pro provided user training services. Upon the stable availability of CRM 4.0, Biz IT Pro upgraded the CRM 3.0 deployment to CRM 4.0 during non-working hours. We are now taking advantage of the new features supported by CRM 4.0 to redesign the existing database for greater efficiency, automating more user tasks using CRM workflow, and moving QRPS to greater levels of productivity

The Results

As a result, productivity has improved; employees are able to quickly access critical information about prospects and customers, allowing them to reach their growth plans. Data is now stored in a secure and stable database. QRPS can now support more clients without adding additional staff.