

## Markinson and ANZIIF: *transforming relationships together*



### THE FACTS:

- > The Asia-Pacific region's leading provider of education, training and professional development services to the insurance and financial services industries.
- > More than 15,000 members across 30 countries.
- > [www.theinstitute.com.au](http://www.theinstitute.com.au)

### THE SOLUTION:

- > A highly customised Sage SalesLogix CRM solution, developed in partnership with Markinson over an 18 month period.
- > 24 x 7 x 365 support from CRM specialists.

### THE RESULT:

- > Details of customer purchases, services and historical interactions at the touch of a button.
- > Improved customer service through greater client insight.
- > Revenue improvements through more effective sales pipelines and more intelligent targeting.

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## MARKINSON AND ANZIIF

When The Australian and New Zealand Institute of Insurance and Finance (ANZIIF) decided to custom develop their own Relationship Management Solution, Markinson was chosen as the provider to help. The result of this powerful partnership has been a ground-up transformation in the way that ANZIIF operates: the creation of a whole-of-business platform that's streamlined ANZIIF's customer engagements and business processes while setting a new level of industry best-practice.

### The Situation

The Australian and New Zealand Institute of Insurance and Finance (ANZIIF) is the Asia-Pacific region's leading provider of education, training and professional development services to the insurance and financial services industries.

With more than 15,000 members across 30 countries, the Institute offers a range of educational and training products, compliance solutions and industry workshops for the benefit of individuals, organisations and the insurance and finance sectors as a whole.

With a complex customer base and business information spread across disparate databases, an internal business review revealed that the IT solutions in place, weren't up to the task.

As ANZIIF's General Manager of Operations and Service Delivery Luke Davies, explains, "Integration failures meant that obtaining a single-view of a member's information wasn't a simple

task. At the same time, unnecessary manual processes and duplication of effort across the business were leading to operational inefficiencies."

To boost its efficiency and effectiveness, ANZIIF decided to develop its own CRM: a bedrock platform on which the organisation would be able to build.

"Like most businesses, we had processes and workflows that were unique," says Davies. "Our first task was to find an existing CRM solution that we could adapt and customise in order to meet our specific needs."

After investigating the pros and cons of various platforms, ANZIIF selected Sage SalesLogix as the most appropriate Customer Relationship Management (CRM) solution for their business.

"Sage SalesLogix provided the type of automated workflows and reporting features that suited us as a members and training association," Davies says.

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## The Solution

Having chosen a base platform, ANZIIF went in search of specialist help. “This was a significant investment for the organisation,” Davies comments. “In essence, we were looking to create a CRM that would serve as the engine room for much of our business. We needed an experienced development partner with the skill set and commitment to work with us for an extended period. Markinson quickly emerged as the logical choice.”

In close consultation with ANZIIF, Markinson developed a new CRM solution for the Institute over a period of 18 months, primarily through the work of an on-site development team.

“The professional way in which Markinson embedded themselves within our organisation and familiarised themselves with our processes had a real bearing on the end result,” says Davies.

Now live, ANZIIF’s new CRM solution is driving new efficiencies in almost every area of ANZIIF’s operation.

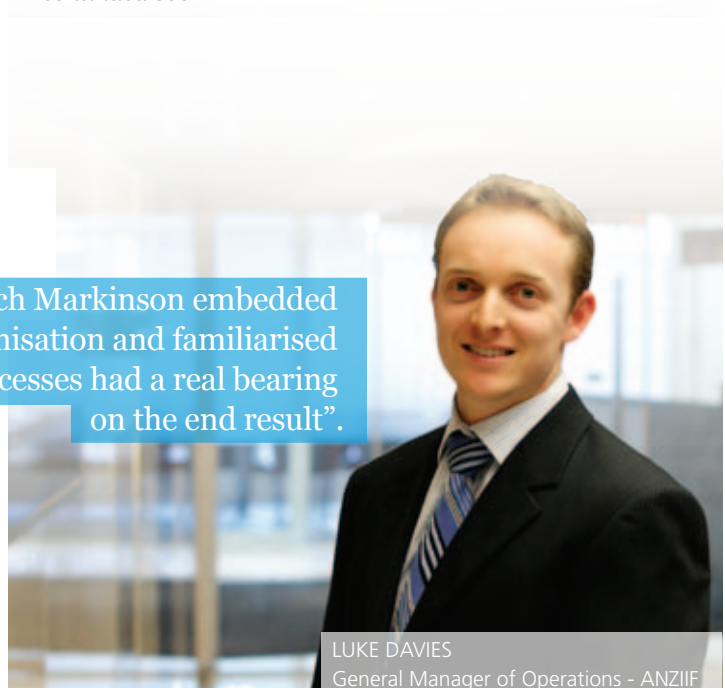
Complete customer profiles – including details of purchases, services and historical interactions – are now available instantly to ANZIIF’s staff, vastly improving the organisation’s customer service abilities. Accounts receivable functionality has been built-in, delivering integrated invoicing and account management tools.

Importantly, the system also allows ANZIIF to group customers by company (and to group companies in turn by their parent organisation or subsidiaries) in order to get an instant picture of the Institute’s relationship with client businesses.

New workflows and automated processes are also driving the management of six teaching semesters across over 30 countries, including tasks such as results delivery, customer feedback, support services, reminder emails, newsletters and course updates.

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LUKE DAVIES  
General Manager of Operations - ANZIIF



“In almost all aspects of our business the Markinson CRM solution has helped us to achieve new levels of efficiency, insight and operational effectiveness”.

### The Benefits

Davies says that placing the Markinson CRM solution at the core of ANZIIF’s operations has delivered significant benefits.

“As an organisation, we strive for operational excellence,” he says. “In almost all aspects of our business the CRM solution has helped us to achieve new levels of efficiency, insight and operational effectiveness.”

Davies points to improved customer service through greater client insight, efficiency gains through streamlined and automated processes, and revenue improvements through more effective sales pipelines and more intelligent targeting of both new and existing products as just some of the benefits gleaned from their relationship management solution.

The system has been so successful that ANZIIF is now investigating re-selling it to other members’ associations.

“The system has really set an industry benchmark,” says Davies, “and the fact that other organisations are seeking to use it is a real indication of the quality of the solution that Markinson have provided.”

Asked about ANZIIF’s relationship with Markinson, Davies cites Markinson as an ideal development partner, growing with ANZIIF over a long period of time and assisting with implementation, training and support programs.

“We fully endorse Markinson’s CRM credentials,” he says. “We would – and indeed we have on several occasions – recommend their services to any business searching for CRM expertise.”

Questioned on future plans, Davies says that the CRM solution is the foundation that ANZIIF needs to expand its member offerings, including further integration with web-based services to allow members to communicate more easily with each other and manage their own training and course enrolments.

“With Sage SalesLogix and Markinson, we’ve designed a unique and comprehensive CRM solution for our requirements,” Davies concludes. “Not only has it transformed our business operations and customer relationships, but in many cases it’s improved the quality of the products we serve as well.”



For more information on how a Markinson CRM solution can benefit your business, visit:

[markinson.com.au](http://markinson.com.au)  
or call 1300 137 729

