

Sales and marketing without compromise



Customer

Wallstreet:online capital AG

Industry

Financial Services

Location

Germany

Solution

Sage CRM

“wallstreet: online capital AG’s offering is intended for experienced investors who make their investment decisions independently, who want to achieve top prices simply and efficiently, with no compromise on quality or service. Sage CRM helps us to meet these demands.”
Martin Gutschmidt, Account Executive, wallstreet:online capital AG (PLC).

Since its foundation in 2001, wallstreet: online capital AG has developed into one of the leading independent fund brokers on the Internet.

Via its web portal, the Berlin based company offers a wide range of products in the areas of closed-end funds, hedge funds, mutual funds as well as certificates and bonds. Martin Gutschmidt relies on support from Sage CRM: “In the beginning wallstreet:online Capital AG managed incoming jobs reasonably well as a one man company with various individual applications.

As the company grew, its requirements became more complex and the system of Excel tables and Access databases became more confusing. Sage CRM allowed us to simplify our processes and centralize them in one compact solution. This was exactly what we required from the software - it captures our exact workflows and automates many processes.

Challenge

As the company grew, Wallstreet needed a solution that would be less confusing and would streamline processes.

Solution

Sage CRM has simplified business processes and centralize them in one compact solution. It captures exact workflows and automates many processes.

Results

Wallstreet are now able to quantitatively capture much more customer information, allowing instant access to all relevant customer data. An optimal link between marketing and sales means they are able to plan better and more targeted advertising activities.

‘Sage CRM allowed us to simplify our processes and centralize them in one compact solution. This was exactly what we required from the software - it captures our exact workflows and automates many processes’

Martin Gutschmidt,
Account Executive

By centralizing data, we avoid duplication or triplication of work and can now quantitatively capture much more customer information. For each customer, there is now an electronic customer file which allows instant access to all relevant data. Sage CRM allows for an optimal link between marketing and sales. The software provides information from Sales, which we can use to plan better and more targeted advertising activities. In turn, we get new information that is useful to Sales through reports analyzing our activities.

An important factor for us is the automation of commission calculations for the sales force. We have reduced the manual effort of 4 days per month to 1.5 hours as we could easily integrate this payment into Sage CRM.

About Sage CRM

Over 15,000 small and medium sized companies across the globe use Sage CRM every day to accelerate sales, drive business productivity and make every customer interaction count. It is used by enterprising, growing companies seeking new ways to interact with customers, leverage the power of social media and take advantage of the latest mobile developments to further grow their business. When combined with Sage ERP, our customers enjoy better business insight, increased efficiencies and productivity, and gain a single, customer-centric view across their entire business. So whether you're just starting out or have already grown to several hundred employees, Sage CRM can help accelerate your business success.

Accelerate your business success with a free 30-day trial at www.sagecrm.com

