

CASE STUDY – CANDIAN IMPERIAL BANK OF COMMERCE

CIBC

Please read - Tips and Enhancements (updates throughout the week)

Daily Activity Review

As part of the troubleshooting process into the performance issue, please be advised that the Daily Activity Review will be temporarily unavailable. [more...](#)

Card Product Payment Protector (PayPro)

Effective October 23, Thursday, you will need to record sales of Card Product Payment Protector using the 'Add Another Sale' button rather than as a related product. All Card Product PayPro revenue will be updated to such that the revenue will be shown on the date that the original sale was recorded. We will re-introduce the related product functionality to Card Products at a later time. [more...](#)

Small Business Card Product

The Small Business Aerogold Card product in SM@RT has been renamed to 'Small Business Card Product'. Please record all Small Business Aerogold, Bizline, and SB Entourage cards using this product. We realize that the revenue is a little overstated for some of these products. We will be adding individual SB card products to SM@RT once performance issues have been resolved. [more...](#)

Client Activity Page

Save (final) Cancel

Contact Type (Required)

Source

Walk-in

Contact (Initial Intent)

Sales Activity

Date (of contact)

Nov 11, 2003

Client Details

Client Lookup... PCNA

First / Last Name ONE HORIZON

Non-Personal Name

Home Phone # (416) 784-8735

Home Transit (CMS) 02112

Segment Other

Convenience Card #

Comment (for this client interaction)

Add Sale / View Pipeline Add Transaction Service Add Referral

Type	Details	Product	Amount	Account #	Revenue	Transit #	
Sale	Product Category	Card Products	Aerogold	\$0	\$120.00		Delete
Transaction	ABM / Limit Increase						Delete
Referral	CIBC Wood Gundy				\$0.00		Delete

Project: SM@RT

Industry: Financial Services

Technologies Used: .NET

Description: **The Challenge:**

CIBC's Retail Banking division had a need for a robust, user-friendly customer relationship management system. In the past, customer service representatives at the bank's branches had no effective way to monitor and measure their sales pipeline. A need existed for a tool to help reps identify relevant campaigns for their clients, provide scripts for telesales, and suggest products for up selling. From a management perspective, it was difficult to measure sales rep's performance, conduct trend analysis, benchmark, or identify best practices. There was a lack of accountability related to measuring the success of various campaigns or leads. As well, existing processes were paper-based, making it challenging to track and measure the performance of sales staff.

The Solution:

Navantis work on CIBC's CRM tool began in the Fall of 2001 and it has since seen three major versions released to the Retail Banking division's 25,000 personal bankers and customer service representatives. Originally designed as an interim solution, SM@RT version 1.0 was designed to provide retail banking employees with a tool for tracking advanced customer intelligence and to conduct profiling in order to match retail banking customers with the appropriate financial services. The system proved to have greater functionality and better TCO than the originally

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proposed CRM system and as a result was selected as the division's permanent CRM solution.

The Benefits:

For version 1.0, Navantis created a translation layer to connect existing backend technologies to a new user-friendly front end. The tool allowed for detailed backend reporting on usage, customer referrals, and sales by area or product. In version 2.0, SM@RT was integrated with external bank systems such as PMR allowing for real time portfolio information. For Version 3.0, Navantis migrated the entire solution to the .NET platform. The current version, 3.5, has seen the Navantis team continue to manage and refine the application allowing branch staff and their managers to make better decisions.

Last Updated: October 2009