



JM FINANCIAL GROUP LTD- Case Study

FINANCIAL SERVICES INDUSTRY
ON PREMISE CRM

Company Description

JM Financial Group Ltd (JMFG) is an independent specialist manager of Australian equities

Situation

- With a focus in the financial sector and the security issues that this sector provides JMFG required a specific CRM solution
- It was also most important that we were able to continue with our business process
- Quick analysis of information in the financial industry provides clients with a complete overview

Solution

- JayThom implemented on-premise CRM
- Reporting conversion to Microsoft SQL Reporting services
- Automated e-mails are sent to advisers with a link to the specific information they require

Benefits

- All requirements are covered, from basic customer relationship management to JMFG's entire IPO process and reporting
- Continually updated client profiles from CRM linked to portfolio information allows for analysis of the most-up-to-date information
- Advisers are provided with all the tools they need to make informed decisions to their clients Reports are available to advisers from familiar Internet Explorer environment and users enjoy the option to view and export to preferred formats like PDF or Excel for further quick and simple analysis
- Customer risk is more closely monitored leading to better outcomes for the client and JMFG



“With a focus in the financial sector and the security issues that this sector provides we required a specific CRM solution...[CRM] has covered all our requirements, from basic customer relationship management to our entire IPO process and reporting. JayThom has been integral to our successful implementation, their support and understanding of database development has allowed for a quick, smooth transition.”

Peter Mitchell
Analyst
JM Financial

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