



Groupe Meeschaert  
Paris, France  
www.meeschaert.com

#### Industry:

Financial Services

#### Employees:

160

#### Oracle Products & Services:

Oracle CRM  
Siebel Sales  
Siebel Campaigns

#### Oracle Partner:



Adeon  
www.adeon.com

**“Thanks to Oracle CRM, we were able to enrich our CRM-related range of services in the trading business market. Since migrating to the new version, we’ve improved performance on requests by 30% and now manage more than 300 campaigns a year.”** – Brigitte Barbaray, Head of Information Technology, Groupe Meeschaert

## Groupe Meeschaert Improves Customer Lifecycle Management and Marketing Effectiveness

Groupe Meeschaert is a leading French independent investment company. Founded in 1935, the family owned group specializes in asset management, contract management, and estate planning. It includes a network of 10 counseling and asset management agencies in France, a unit dedicated to its "Family Office" (family legacy), which covers the United States, Switzerland, and Belgium, and a subsidiary devoted to real estate counseling.

### Challenges

- Implement a customer relationship management (CRM) solution within an adaptive information system architecture
- Meet International Organization for Standardization parameters, including sales and campaign management
- Consolidate all company services through a single CRM solution, including market index tables (trading business market), back-office functions, marketing, and auditing

### Solution

- Worked with Oracle partner, Adeon, to seamlessly migrate to Oracle CRM within the five-month timeframe
- Extended sales force management automation capabilities for financial, household tax, and institutional accounts
- Improved management of the prospective customer lifecycle by creating a single centralized database covering 35,000 contacts
- Increased CRM tool adoption among counselors, which improved productivity, increasing the customer account reports generated from 5,000 to 20,000 within a five-year period
- Increased return on marketing investments by improving the global campaign response rate from events and mailings
- Gained the ability to effectively execute more than 300 targeted marketing campaigns in one year
- Allowed Meeschaert counselors to access customer account reports through a single mouse click, enabling more agility and reducing administrative burden
- Reduced processing time by enabling back-office staff to qualify new customer accounts in only two days instead of the previous 10-day cycle
- Improved regulatory control and assessment of clients' financial knowledge by recording market index conversations and enabling record verification
- Improved performance by 30% on customer database requests