



Huatai Securities Co., Ltd
Nanjing, China
www.htsc.com.cn

Industry:

Financial Services

Annual Revenue:

US\$650 million

Employees:

1,800

Oracle Products & Services:

Siebel Financial Services CRM
Marketing Automation
Siebel Financial Services CRM
Sales

Implementor:

Oracle Consulting

“Oracle’s Siebel CRM applications are flexible and include features that fulfill our specific customer service requirements. The system helped us transform into a customer-centric business with the ability to compete effectively in a volatile financial environment.” – Wang Ling, Project Manager, Science and Technology Department, Huatai Securities Co., Ltd

Huatai Securities Improves Profitability by Adopting Customer-Centric Business Model

Huatai Securities Co., Ltd is one of China’s top 10 securities brokers. It has an “AAA” rating from the China Securities Regulatory Commission and maintains 180 branch offices across the country. Huatai Securities has majority shares in a number of Chinese brokerage firms and established a joint venture with AIG to form the AIG-Huatai Fund Management Co., Ltd.

Challenges

- Build a customer relationship management system to support a move from a product-centric to a customer-centric business and expand market share
- Gain a 360-degree view of customers to improve service
- Enable the sales and marketing teams to tailor information based on specific customer needs
- Promote information sharing and collaboration between the customer service, sales, and marketing divisions

Solution

- Engaged Oracle Consulting to build an integrated CRM system based on Oracle’s Siebel Financial Services applications
- Increased customer satisfaction and loyalty rates by providing responsive, tailored services
- Achieved integrated management of the customer service, sales, and marketing processes, leading to overall improvements in customer relationship management
- Gained real-time visibility into complete customer profiles, enabling staff to provide personalized service
- Improved profitability by using the Siebel system to identify high-value customers and ensure they are exposed to products and services that suit their personal circumstances
- Boosted the success rate of marketing campaigns by using customer analysis research to develop messaging that resonated with target market
- Supported information sharing between departments and enabled collaboration between sales and marketing teams in different divisions