



Sanlam

# Sanlam uses Qorus to work smarter

Sanlam Investment Management (SIM) replaced their manual process of data capturing, and client communications with Qorus's dynamic integration of Microsoft SharePoint 2010 and Microsoft Dynamics CRM 4.4 to help accelerate the creation of documents, create more accurate reports and ensure efficient client communications.

## Summary

SIM is one of South Africa's largest investment management companies, offering a comprehensive range of investment products to end-investors, intermediaries and institutions. Their investment offerings include both passive and actively managed unit trusts, hedge funds and segregated and pooled retirement funds.

## Client service process

Client service officers (CSOs) send out 244 reports to various clients on a monthly basis, with different clients receiving different reports based on their type of investment offering, their location as well as their preferred language.

In the past the CSO's were responsible for manually developing all the reports required, making amendments where necessary and composing individual emails for each client based on their profile.

## Pitfalls, inefficiencies and frustrations. The issue resulting from this manual process included:

- Errors and inconsistencies were common as a result of the number of reports being developed and the manual process of editing (copy and paste from previous versions, grammatical errors, typos, incorrect facts and the incorrect use of language and colloquialisms)
- No reports or incorrect reports being distributed to clients
- Time-consuming manual processes resulting in additional costs and resource
- A lack of standardized templates that had a professional feel required for a multilingual client base.

The combination of these challenges and inefficiencies led to SIM performing badly against their SLAs, damage to their reputation, a loss of client confidence, increased risk of company penalties and fines a reason for these points has already been given at the start of this paragraph.

## Solution: Qorus and CRM integrations

SIM added Qorus to their existing SharePoint and Nintex Environment to simplify and accelerate the generation and storage of reports and client data.

Qorus helped ensure that their data source could come directly from a SharePoint list and would allow for the creation of prepopulated emails that would guarantee that SIM's clients received personalized emails, including the correctly attached reports, without looking like a computer generated email.



*"In all my years of experience with different automation processes I haven't found one that has been as efficient as Qorus within the SharePoint environment."*

**Barry Lee Lodewyks**  
Business Solutions Analyst for SIM

## Outcomes

- Report generating system
- Web services extracting client data
- Workflows running batch jobs that mix Qorus document generation and
- email functionality
- Timer jobs – zip more than 5 portfolios, only batches of 10, intraday, no client getting 3 emails

With the help of Qorus SIM have had a 95% increase in mailbox exchange efficiencies, production times, improved accuracy and a consistent client experience.

## This has led to

- Saving costs: reduced company costs
- Saving time: reduced time spent on data capturing and client reports
- Higher quality reports and improved communication
- Better accuracy and compliance
- Competitive advantage

We believe that no other company has been able to automate this process but with Qorus SIM is able to extract CRM data and SharePoint content, and also store created documents in SharePoint.

## Key points

- Understand your processes first
- Integration is possible
- Understand the software functionality
- Map the new process
- Have a competent driver in the business
- All repetitive tasks could be made simpler
- Standardization of client communication – branding
- Consistent client experience
- Mailbox exchange efficiencies



## See Qorus in action!

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## About Qorus Software

Qorus is the sales enablement platform that connects people, content and data to get to market fast and win more deals.

Our software is incredibly powerful but highly intuitive and very easy to use. It's integrated across Microsoft 365 and major CRMs. Our award-winning Customer Success Team ensures our clients across all industries reach their goals.

We are a diverse, vibrant group with headquarters in Seattle and major offices in New York, London and Cape Town.

