

**City Credit Capital** offers a trading platform for dealing in various financial contracts including CFD (Contracts for Difference) on commodities, indices and currencies, and Foreign Exchange Margin Trading.

### Drowning in data

A new company, with a strong sales focus, City Credit Capital was drowning in data. Its direct customers are brokers, but because of strict guidelines for companies working in the financial sector, it must also maintain an audit trail on the end user – ie the broker's customer – resulting in twice the data.

### Scattered approach

In the early days, sales staff had different ways of keeping customer data. In some cases it would be handwritten; in others, entered onto an Excel spreadsheet. This meant the company struggled with collating information for tasks such as forecasting and case management.



*"The system is brilliant in the way it supports this layered customer scenario"*

**Honorata Glowacki**  
City Credit Capital

### 'Expensive mistake'

To better manage its data, City Credit Capital originally commissioned a bespoke CRM system. But over time it became apparent that this was not the solution and it abandoned the project. "It wasn't doing what we wanted," says Compliance Analyst Honorata Glowacki. "We needed something flexible that would evolve with us as our business developed. If we had adopted the bespoke system, we would have had to be constantly building in changes, which would have been time-consuming and costly. To be honest, the bespoke application route turned out to be a very expensive mistake.

### Cutting through the clutter

Having studied six different turnkey solutions, the company knew Really Simple Systems was the only supplier capable of meeting its needs. "As a small company our budget was limited," continues Honorata. "The Really Simple Systems technology was not expensive but the solution it provided was perfect. For example, it can be configured to reflect the changes and developments in our business. Also, the other systems we looked at were very confusing. In contrast, Really Simple Systems was clear, uncluttered, and straightforward. It is very, very easy to use.



*"A good CRM system is the cornerstone of efficient customer service, which underpins our City Trader division".*

*"We are thrilled that Really Simple Systems has enabled us to achieve this".*

**Julian Soper, CEO**  
City Credit Capital

### Relationship building

Really Simple Systems introduced Case Management, Sales System and Forecasting applications, meaning the company can now monitor their relationship with each client. "Customer visibility has improved massively," says Honorata. "We can use forecasting for business management, monitor workflow, and maintain good relationships with clients. We now have a full customer history for every client, so if someone in sales leaves it doesn't cause problems. Our customer service has improved enormously thanks to Really Simple Systems".

### Law abiding

And, crucially, the company can now rest assured that it is adhering to its obligations under the Finance Act and regulated by the FSA. "The system is brilliant in the way it supports this layered customer scenario" says Honorata

### Seamless transition

Honorata also praises Really Simple Systems for conducting a seamless and pain-free implementation. "It was so quick and easy – it took just weeks. The system is also simple to look after, which is important because we didn't want to have to spend lots of money on support and maintenance. In fact that was all included in the package." Customer support has also been exemplary, says Honorata, describing it as "gold-standard".

### Final verdict

To give the last word to Julian Soper, City Credit Capital's CEO: "A good CRM system is the cornerstone of efficient customer service, which underpins our City Trader division. We are thrilled that Really Simple Systems has enabled us to achieve this".

For more information on City Credit Capital visit [cccapi.co.uk](http://cccapi.co.uk)

**Really Simple Systems** Hosted CRM is aimed at small and medium sized organisations with between 5 and 200 people who want a straightforward hosted CRM sales, marketing and support system. The hosted model is particularly suitable for companies with multiple locations and sales people who work remotely or at home. Really Simple Systems is the largest United Kingdom provider of hosted CRM systems and has offices in the UK and Australia. Users include the Royal Academy of Arts, the British Library, Citicorp and the Department of Health as well as many small and medium sized companies.

**Really Simple Systems Ltd**  
The Long Barn  
Ramsdean  
Petersfield GU32 1RU  
Tel: +44 (0)1730 823300  
Fax: +44 (0)870 1269910  
[reallysimplesystems.com](http://reallysimplesystems.com)

**Really Simple Systems Pty Ltd**  
19 Willoughby Rd  
Crows Nest NSW 2065  
Australia  
Tel: +61 2 8987 1909  
Fax: +61 2 9439 2157  
[reallysimplesystems.com.au](http://reallysimplesystems.com.au)