



Harris Fraser Group (“HFG”) became a wholly owned subsidiary of Mason Group Holdings Limited (MGHL) in 2018. The Harris Fraser Group specialises in wealth and investment management. It is one of Asia’s largest and oldest Wealth Advisors. It has a Pan-Asian footprint services more than 14,000 clients.

1st Financial Service Cloud Implemented in Hong Kong

Challenge

1. The existing in-house contact system was not user-friendly and lack of access right control.
2. It was difficult to do cross-selling & up-selling.
3. It was hard to keep track of the feedback and response rate on the eDMs delivered.
4. Data was unstructured and had no segmentation, a lot of effort was needed in filtering; making it difficult to generate product and customer reports.

Laputa Services

Riding on Laputa’s past implementation experience for the FSI, it incorporated the best practices to speed up the overall implementation process for HFG into 8 weeks with high customer satisfaction

Salesforce Solution

1. Financial Service Cloud (FSC) is user-friendly with other extended functions, e.g. access right can be granted to different levels of users.
2. The unique feature of Household relationship of FSC can identify family relationship of different clients via providing the entire household investment amount and list of products for cross-selling opportunity.
3. Pardot enables better view and tracking of eDM response as well as facilitates the lead nurturing and follow-up.
4. Better customer segmentation and reporting let customer focus on high value customers.



Financial Service Cloud



Pardot

8 Weeks

Implementation

