

Case Study: Citri

Project: Microsoft Office SharePoint Server (MOSS)

Citri

Citri is a national broking firm for financial services able to access the entire mortgage market providing one to one professional advice to consumers. They also offer a refreshing solution to financial business administration for independent financial advisors.



Key Challenges

Citri was a start up company specialising in mortgage advice and solutions. With field based consultants working in a number of locations, Citri wanted an information portal for all mortgage advisors that could communicate news, events and announcements. In addition they needed the portal to change the information made available based on a person's role and responsibility. As an advertising tool Citri also wanted to include a website as part of the project that detailed their information and products.

Some of the specific issues that the system had to address were:

- Deliver a highly efficient and cost effective solution.
- Promote and support the recruitment and retention of the best consultants.
- Deliver a secure and robust solution that is also future proof.

The Solution

As part of Citri's business plan, one of their priorities was to thoroughly support their Mortgage Advisors. This meant that all Mortgage Advisors needed to have access to important pieces of information on a regular basis.

This included:

- Research from the financial services industry
- Ability to communicate with other Mortgage Advisors

- Training materials
- Industry News
- Lead information and commission statements
- Product information and links to external sources

Access needed to be restricted to those given permission and included Business Consultants who needed to see the information provided by the Mortgage Advisors they were supporting. Content could be created and uploaded by a number of authorised individuals.

Citri were aware that the needs of those with access may change in the future as the business grew and therefore they needed a solution that would allow them to add additional functionality in the future.

Client Testimonial

"From first meeting at Perfect Image I was confident and reassured that this was a company who could provide the technology solution for Citri. Over a six month period we have worked closely together and I am delighted to say they have provided us with an implemented solution for our business. I am confident that we have established a strong relationship which will prove fruitful for both parties as Citri grows"

Keith Atkinson
Chief Executive

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Citri asked Perfect Image to work on the capture of all requirements and then design, develop and deploy both the software and the infrastructure. Through a number of workshops we were able to provide an innovative solution that met the requirements and we designed a system based around Microsoft Office SharePoint Server.

Perfect Image recommended a Microsoft solution as it met Citri's request to use recognised standard technologies, and benefited Citri through its:

- Reliability
- Future proofing
- Cost effectiveness
- Extensive suppliers support community

Perfect Image and Citri staff members worked closely together as a team to ensure the rapid development, testing and deployment of a complex and far reaching system. A key focus on skills transfer ensured that they could provide their own support and training moving forward and undertake day to day operations.

The Result

Perfect Image developed a portal using Microsoft Office SharePoint 2007 (MOSS) which was integrated into Microsoft BizTalk and Dynamics GP. This provided the functionality that enabled a commission facility to display targets, commission and performance for each Mortgage Advisor. The intranet created was permission based and dependent upon log in details and position in the company; the content of site changed for each group of users. Both the internet and the intranet site were built from the same MOSS installation.

Citri Mortgage Solutions now provides quick easy access to all their information which is effortlessly dispersed throughout the company. The solution not only allows access to all news and announcements but also provides a tool for open communication paths that strengthen contact between and throughout the field based employees. This has been achieved with very little end user

training as the software is based on familiar Microsoft products.

