

“From having a limited work flow process system before, Streamline now takes care of our client database, portfolio allocation and client records – all at a reasonable price”, says Matthew Wray of Statucor, part of auditing firm BDO.



Statucor provides company secretarial services, ensuring that clients comply with the relevant legislative requirements that are required for the day-to-day running of a business - such as attendance at board meetings, annual returns and attending to all of the necessary statutory amendments. Accurate client information is therefore an important aspect of what Statucor requires from Streamline. Clients are allocated to portfolios to ensure consistent client communication and all jobs are tracked and monitored in Streamline to ensure follow-through and timeous execution of the required services.

Statucor has a customised process that measures the values of jobs per portfolio against expected income to assist in the management of portfolio size (allocation of clients to a consultant) and monitor income levels per portfolio. The customised reports provide Statucor with up-to-date information on the status of the business, providing information at a glance that enables Statucor to determine the effectiveness of the consultants and whether targets will be met.

Streamline's core functionality provides the client database that is the essential part of Statucor's solution. Thus, the additional customisation was easily accomplished by adding the custom fields to the database that allocates the client to a consultant. The next step was to replace manually produced reports with auto-generated reports in Streamline that provide all the same information, in the required format. This saves time and ensures that the reports are always available on request – no-one has to first go and update the report, it's simply there.

Customer relationship management starts with ensuring that ownership for the relationship is allocated to a staff member. Thus, when a client phones Statucor, it is an easy process to put them through to the right person.

Different businesses have different requirements based on the depth of the customer relationship but utilising Streamline ensures that those relationships are nurtured and the client experience is a positive one.