



- Saxo Bank A/S is a fully licensed and regulated Danish bank specializing in online trading and investment across global financial markets. With clients worldwide, Saxo Bank is recognized for excellence in service and technology
- When Saxo Bank transitioned to Microsoft CRM, the bank needed a solution that was able to direct calls to the sales team quickly and targeted precisely at the correct account manager.
- It was important that the solution could be integrated with Saxo Bank's CRM system, so employees would be able to view the customer's data on the screen before answering the call.

Zyline's Solution

- After having implemented standard solutions, Saxo Bank realized that in order to integrate with Microsoft CRM, Zyline ID was the most efficient standard solution.
- With Zyline ID, all calls to a specific number are recognized instantly and sent by URL to Microsoft CRM database. The system retrieves the customer data, locates the customer's personal advisor, and relevant data is displayed on the screen before the call is answered.
- Zyline ID also triggers the collection of data in connection with the call, such as the time it began and ended, its duration, the topics covered, etc.

Benefits – Enterprise

- Zyline ID improved Saxo Bank's service to its customers and improved support of each employee.
- With Zyline ID, Saxo Bank feels that their employees have the best tools at their disposal, which is imperative for the company.
- Zyline ID has been implemented in all of Saxo Bank's departments worldwide and is used by approx. 300 employees in sales and sales training.

Benefits – User

- Customers get through to the right employee faster, and they no longer need to provide account numbers and other details in order to be served.
- The sales representative can deal immediately with the customer's query and no longer has to ask for details that the bank already knows.
- Employees know with whom they are speaking, and they have an easy overview of any information they will need in order to offer the best advice and guidance to the customers.

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