



## Case Study Overview

Birch Gold Group, a precious metals business located in Sherman Oaks, California, was seeking an electronic solution to track and manage their Customer Relation Management (CRM) process. The system would help them attract, win new clients and facilitate the retention of existing ones. It would also reduce the costs of marketing and client service. Their experience with implementing Intellect at their previous company, provided them the confidence at the launch of the new company that Intellect would be the right solution to manage their Customer Relationship Management (CRM) processes.

Intellect offered Birch Gold Group the flexibility, scalability, control, ease of use and ease of configuration critical to meeting their new business process needs.

## Birch Gold Group

Birch Gold Group, a precious metals company based in Sherman Oaks, California, helps first time precious metals investors as well as experienced, high-end platinum investors, invest their capital in the best precious metals according to their economic needs.

The company is committed to their clients' satisfaction. They keep their clients updated on the growth of their portfolio by providing them with a monthly analysis of precious metals.



## Challenges

**Birch Gold Group was seeking an electronic solution to track and manage their Customer Relation Management (CRM) process.**

## Challenges

When they launched the business in 2012, the founders of Birch Gold Group knew they needed to automate their Customer Relationship Management (CRM) processes in order to help them scale their business quickly. They needed the best technology they could find to organize, automate and synchronize their business processes.

The company needed to handle processes like implementing and tracking their call back system. They needed to simplify their shipping and purchase orders to keep transparency throughout the process, avoiding confusion and loss of time. The problem with most off the shelf CRM Software solutions was their complexity and difficulty to understand by non-technical users. However, the most challenging problem for Birch Gold Group, was the lack of flexibility and workflow management in other CRM solutions. They needed a BPM solution that would offer them the flexibility and scalability to customize and maintain their processes, in house and as needed.

## Solution

Having had the success and experience of implementing Intellect in their previous company, it was a clear and easy decision for Birch Gold Group to repeat that success. They had already enjoyed the flexibility, ease of use, speed of configuration and capabilities of the platform.

The company deployed their core and custom CRM processes with Intellect in just a couple of months. They molded the platform to fit their specific business model. They were also able to rapidly iterate multiple times, improving their processes as they identified bottle necks and process improvement areas.

## Results

Today, Birch Gold Group continues to manage and update their processes in the platform to ensure they keep up with their business model. Intellect offered Birch Gold Group the flexibility, scalability, control, ease of use and ease of configuration critical to meeting their new business process needs.

“We were able to mold the Intellect platform to meet the exact requirements we needed for our company’s CRM processes.”

- Andrew Manke, CRM Technician.