



CASE STUDY

Using Microsoft Dynamics 365 to redefine the funeral plan provider's security model and prepare it for new industry-wide financial regulation

Golden Charter 



Objectives

Golden Charter uses Microsoft Dynamics for almost all of its line-of-business systems, from sales and marketing to HR and finance.

Through many years of use, the system's access control model had become convoluted and disordered.



Challenges

Golden Charter captures sensitive customer information relating to funeral arrangements and personal details.

New financial services industry regulations were coming into force and they needed a degree of control over their data to gain clarity for auditing purposes.



Solutions

The Golden Charter team didn't have the skills in-house. So they asked Proximo 3 to carry out the access control work ahead of the FCA's regulatory changes.

As a result, they now have a coherent, well-organised security model. They are also in a great position for future auditing which is critical for FCA compliance.

OUR BENEFITS

Benefit One

Lower risk of security breaches and enables GDPR and FCA compliance

Benefit Two

Quicker, easier and more productive experience for employees

Benefit Three

Audits are more manageable and smoother



"We have renewed confidence in our security and compliance. PROXIMO 3 were outstanding."

**VICKY LAMONT, CRM
PRODUCT OWNER**
Golden Charter