



## CASE STUDY

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

### 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 systems access control model had become complex and reactive to personal needs.

## 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

### 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.

## Golden Charter

### 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.



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

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