



SUCCESS STORY

Global Leader Replaces Salesforce.com with Microsoft Dynamic CRM

ENTERPRISE

FINANCIAL SERVICES

HEALTHCARE

PROFESSIONAL SPORTS
& ENTERTAINMENT

PUBLIC SECTOR

Global Leader in Indexing and Asset Allocation Strategies Replaces Salesforce.com with Microsoft Dynamics CRM to Build Stronger Connections with Clients and Clear a Path for Growth

CHALLENGE

Find a CRM solution that would improve usability, visibility, reporting, and security while lowering TCO through an extensible platform that could be supported internally.

Research Affiliates' competitive edge lies in the way they do business—from their entrepreneurial culture that continually strives for new ways to help their clients succeed to their ability to blend deep academic research and real world experience in advising them. The firm's Salesforce CRM software, implemented several years earlier and adopted by few in the firm, was not doing the job. And, in their business, not understanding the client to the deepest level is not a good position to be in.

There were several other issues. The rigidity of Salesforce continually forced Research Affiliates to fit their business to the software. They needed an agile CRM solution to address their mission-critical goals and one that supported their way of doing business. In addition, Salesforce was becoming too expensive to support. A move to Microsoft Dynamics CRM would lower costs and improve usability. From an IT perspective, migrating to Dynamics CRM also meant it would be easier to integrate data and other systems. From a business perspective, the seamless integration with Outlook would be a huge benefit to staff performance. The decision was made: Salesforce needed to go, and so did the Salesforce partner who had been unwilling to help.

Goals for the new solution:

- Track and analyze relationships with investors and their interrelationships to provide better researched, more intelligent advice.
- Clean, user-friendly interface that fit with business processes so they could spend less time searching for information and more time serving clients.
- Track and analyze activities, including the appointments handled by the firm's partners, while keeping that data secure to better understand costs associated with each client and prospect.
- Gain more internal control over the CRM system to lower the cost of ownership and dependence on outside IT resources.
- Replace disparate systems with a platform that would eliminate silos of information and:
 - Make it easier to find, analyze and report on data
 - Eliminate data duplication
 - Reduce the time spent on data entry and the errors associated with it



ABOUT THE CLIENT

Research Affiliates is a global leader in innovative indexing and asset allocation strategies. Built on a strong research base and led by industry experts, this dynamic firm delivers solutions in partnership with some of the world's foremost financial institutions that offer mutual funds, ETFs, separately managed and commingled accounts.



Our migration from Salesforce to Microsoft Dynamics CRM remains the only consultant-led project that finished on time and on budget.

Brent Leadbetter
Vice President of Client Strategies
Research Affiliates



Gold Customer Relationship Management
Gold Enterprise Resource Planning
Gold Cloud Customer Relationship Management

SOLUTION

Clients introduced the firm to AKA, who had earned a reputation for helping companies in the investment management community achieve excellent results with Dynamics CRM. AKA's collaborative, flexible approach focusing on operationalizing strategies was exactly what they were looking for—a partner who would listen to them to understand their culture and goals, and empower them to function independently once the project was completed. To ensure this collaboration was successful, Research Affiliates was a part of the team, involved in every step of the project that the sales organization would pilot.

“The AKA team did a great job of gathering requirements and understanding our needs from the start,” said Brent Leadbetter, Vice President of Client Strategies at Research Affiliates. “They listened to what we wanted and offered ways to streamline the solution where it made sense, rather than making it more complex and expensive with a lot of unnecessary recommendations, like so many consultants do. In other words, they implemented what we wanted, and nothing we didn't need.”

APPROACH

The key was coupling Dynamics CRM with Research Affiliates' custom data model. Dynamics CRM's power and flexibility, combined with AKA's expertise in financial services, produced a solution that met the firm's requirements and more.

- First, they leveraged the power of choice that Dynamics CRM offers by selecting the on-premise option, allowing their internal IT staff to make their own modifications, also lowering TCO.
- After mapping current processes and data management challenges, the team designed robust activity tracking to allow for more effective marketing and sales opportunity management.
- The system was integrated with Outlook and the firm's website for real-time communication, automatic prospect creation and mailing list capabilities.
- The team designed a new user interface that was cleaner and more efficient, consistent with the firm's business processes, and with a Microsoft look and feel.
- To help Research Affiliates provide intelligent advice, the new system not only included the ability to track, but also the ability to get the data needed to understand client interrelationships.
- The new solution provided the ability to track partner activities while keeping this information secure so that it could be seen only by those specified by management.

RESULTS

The Microsoft Dynamics CRM solution delivered as promised, putting Research Affiliates' strategy into operation. The entire organization utilizes it to onboard new clients and to track and manage all client activities and investment profiles. Cross-team communication and the ability to upsell have improved, increasing efficiency, new business, and customer satisfaction.

The quality of marketing and sales data has improved, and difficult scenarios have been addressed, including partner resource utilization, client interests, and security. On-premise was also the right choice. With AKA's guidance and knowledge transfer, development was taken on internally, giving them the independence they wanted, saving on operating expenses, and putting them in charge of their plans for growth. As for their experience with AKA, Leadbetter says, “They did a great job managing expectations and made the implementation seamless by getting the specifications up front, eliminating all the back and forth. Our migration from Salesforce to Microsoft Dynamics CRM remains the only consultant-led project that finished on time and on budget.”



Usage has increased by 30%

Reporting takes 75% less
time and effort—
and is far more robust

ABOUT AKA ENTERPRISE SOLUTIONS

AKA helps clients transform the way they do business by providing world-class, practical solutions built on Microsoft Dynamics CRM and ERP, as well as Office 365, business intelligence, and mobility.

By combining deep technical expertise with years of experience in a range of industries—from the public sector to financial services—we work closely with organizations to put their strategies into operation. This highly collaborative approach has earned us an unmatched reputation for delivering ongoing return on investment.



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