

Global Investment Management Authority Lowers TCO While Adding Real-Time Reporting, Portfolio Modeling, and More with Microsoft Dynamics CRM

CHALLENGE

Find a new CRM solution and partner to implement it without risk—from planning to go-live—and improve reporting, analysis, and portfolio modeling along the way

Possibly the most recognizable brand in the bond market and manager of the largest mutual fund in the world, this firm has earned its reputation through a strong culture of risk management. With every decision made, potential risk is assessed.

The firm had been using a highly customized version of Onyx, which was supporting many business processes, including: relationship management, portfolio generation, account onboarding and

management, client risk management, and reporting for 800 employees around the world. However, it is not in compliance with regulatory standards, prohibitively expensive to upgrade and support, and could not provide improvements. This added up to a great deal of risk—being out of compliance and the possibility of losing clients.



Although there were possible risks with switching to a new system—disruption in operations and loss of data—the firm needed a new system and a reliable partner to implement it. The firm needed a CRM solution with:

- > The flexibility to fit existing business processes—mirroring them so closely that employees would not know they were working with new software
- > Real-time access to data for on-demand reporting, analysis, and portfolio modeling
- > A strong support network and upgrade path, without the concern of obsolescence

The firm also needed a partner that understood the importance of minimizing risk at all levels. This partner would need to:

- > Have a deep understanding of the CRM software
- > Understand the financial services business inside and out
- > Quickly gain an understanding of their unique business processes
- > Possess strong project management expertise, a proven delivery method, and a collaborative approach

SOLUTION

The firm chose Microsoft Dynamics CRM because of its proven ability to easily model financial business operations, flexibility, ease of use, and price. AKA was selected to implement it, offering

ABOUT THE CLIENT

Founded in 1971, this leading global investment management firm has more than 2,400 professionals in 12 countries dedicated to helping millions of investors worldwide. The firm's goal is to provide attractive returns while maintaining a strong culture of risk management and long-term discipline.



We needed a partner whom we could trust and who could deliver, on time and on budget. We ultimately chose AKA Enterprise Solutions because of the diligence, commitment and exceptional experience they demonstrated.

experience with both Onyx and Microsoft CRM, as well as a reputation for helping investment management firms achieve excellent results.

“We are known for our conservative and low-risk approach to investments that deliver consistent and dependable returns,” said the firm’s executive vice president of CRM. “Abandoning Onyx CRM was a high-risk project; we needed a partner whom we could trust and could deliver, on time and on budget. AKA was that partner.”

APPROACH

The goal was to migrate to a new system completely without risk. AKA modeled existing business processes precisely and added new functionality, all without exposing the firm or its clients. To limit the disruption during the migration, Microsoft CRM was customized to mirror each process already in place, even down to the interface, eliminating the need to re-train hundreds of employees.

“It required an understanding of both CRM products, a detailed plan, and coordination between experienced project managers and 20+ professionals,” said Luke Magnus, a Senior Delivery Manager for AKA. “The collaborative effort was nearly flawless.”

RESULTS

Serving as the operational platform and integrated with their financial system, SYBASE, Dynamics CRM provided:

- > **Financial Account Management** – Track portfolio managers, account balances, and historical performance in six-month, five-year and ten-year increments, providing a 360-view of clients.
- > **Client and Account Risk Management** – Evaluate performance of client investments and account interactions to assess risk of loss to identify and correct issues before accounts are in jeopardy.
- > **Financial Account and Portfolio Modeling** – Create custom portfolios and allow institutional investors to define client portfolios and analyze their performance against benchmarks.
- > **Account Activity Tracking (Integrated with Microsoft Outlook)** – Efficiently track meetings, calls, status, and satisfaction levels of their accounts.
- > **On-Demand Reporting** – Report in real-time on accounts, performance, customer wins, and other factors easily to better service clients.
- > **Contact Management** – Track individual investors and group investments, including tracking customer relationships, reporting on portfolios and accounts, and identifying, nurturing, and managing new investments.
- > **Mobile Availability** – Business users regardless of location could access the system, allowing them to service customers anytime, anywhere.

“With Dynamics CRM, we have a completely customized, well-supported solution that will drive business management and scale with the company as we grow,” said the company’s executive vice president. “Because the project was of the utmost importance, we chose AKA because of the diligence, commitment and exceptional experience they demonstrated. Given the complexity of the project, it is a true testament to AKA that it went as smoothly as it did.”



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ABOUT AKA ENTERPRISE SOLUTIONS

AKA specializes in making it easier to do business, simplifying processes and reducing risks. With agility, expertise, and original industry solutions, we embrace projects other technology firms avoid—regardless of their complexity. As a true strategic partner, we help organizations slay the dragons that are keeping them from innovating their way to greatness.

